

D5

# Communications Training:

*Empowering people in philanthropy to take action on DEI*



# Background on D5: Four Big Goals in 5 Years



Recruit diverse **leaders**



Increase **funding** for diverse communities



Improve **data** collection and transparency



Motivate voluntary **action**

# D5 Funders & Leadership Team

## Funders

The California Endowment

Annie E. Casey Foundation

Marguerite Casey Foundation

Lloyd A. Fry Foundation

Evelyn and Walter Haas, Jr. Fund

Robert Wood Johnson Foundation

W.K. Kellogg Foundation

Jessie Smith Noyes Foundation

David and Lucile Packard Foundation

The Prudential Foundation

Rockefeller Brothers Fund

The Rockefeller Foundation

Rosenberg Foundation

## Leadership Team

**Maricela Espinoza-Garcia**, AriGoio Communications

**Carly Hare**, Native Americans in Philanthropy

**Mae Hong**, Rockefeller Philanthropy Advisors

**Michael Litz**, Forum of Regional Associations of Grantmakers

**Lawrence McGill**, Foundation Center

**Ericka Plater-Turner**, Council on Foundations

**Kristopher Smith**, Funders' Network for Smart Growth and Livable Communities

**Sylvia Zaldivar**, Maestro Cares Foundation

## And Growing...

# Resources for Implementing DEI

ANALYSIS OF POLICIES, PRACTICES, AND PROGRAMS  
FOR ADVANCING DIVERSITY, EQUITY, AND INCLUSION

## Full Report



Models for change

Analysis of activity and resources

On-ramps to get started

What animates DEI work:

- Mobilizers
- Missions
- Money
- Moments
- Movements

# Advancing DEI: Audiences & Objectives



# Research-Based Message & Strategy

- 7 D5 Foundation & Infrastructure Organization Leaders
- 6 Philanthropic Thought Leaders
- 5 Non-D5 Foundation Leaders
- 4 Non-D5 Infrastructure Organizations Leaders
- 3 Non-Philanthropic Leaders (Business, Academic, Public)



# Audiences

Champions:

**Fatigued Fighters**

Emerging Champions:

**Recent Enthusiasts**

Persuadables:

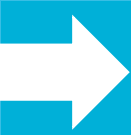
**Heartfelt Pragmatists**

Skeptics 1:

**Pro-Diversity Regulators**

Skeptics 2:

**Rugged Individualists**



# Road Map to Impact



**Be Aware  
of the Need**

AWARENESS



**Care About  
the Cause**



**Understand  
the Problem**

ATTITUDES



**Feel a Sense  
of Urgency**




**Know How  
to Help**

ACTION





# Champions: Fatigued Fighters




**Define Equity Differently**

Establish common definition and train the field.

**Common Language on Equity**



**Care**





**Care**


**Field is Stuck**

Show field is doing something new.

**New Hope**



**Willing to Help**




**Willing to Help**

**Unsure How to Help**

Engage in Take5.

**Act or Encourage Others to Act**


# Emerging Champions: Recent Enthusiasts




**Unaware of DEI Efforts**

Highlight progress & potential of current efforts.


**DEI Movement is Cutting Edge**




**Care**




**Care**




**Understand Problem**




**Understand Problem**



**Willing to Help**



**Willing to Help**



**Unsure What to Do**

Direct to resources and offer peer guidance.

**Have Tools & Support to Make Change**

# Persuadables: Heartfelt Pragmatists



**Aware of D&I,  
Not Equity**

Define equity consistently in all communications.

**Understand Equity**



**Care**



**Care**



**Don't See Relevance  
of DEI to Mission**

Prove effectiveness case with research and stories.

**Understand  
Relevance to Their  
Foundation**



**Don't See Urgency**

Highlight surprising information about changing constituencies.

**Recognize Change,  
Feel Peer Pressure**



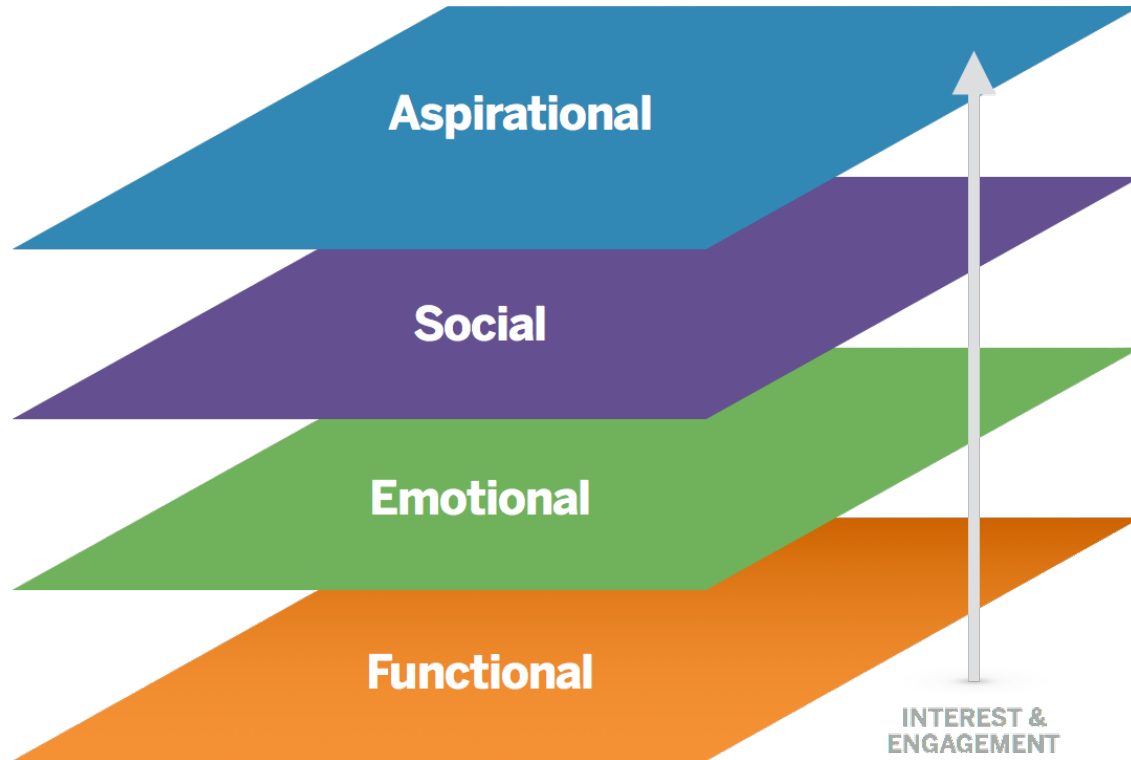
**Not Sure How to  
Approach DEI**

Connect to resources and seasoned peers.

**Have Tools & Support  
to Make Change**

# A Message to Inspire Action

# Approach: Aspirational Communications Model





# Overarching Message

Philanthropists seek to promote the **common good**. Advancing diversity, equity, and inclusion in our organizations and grantmaking helps us live up to our values and achieve **greater impact**.

Our **constituencies** and our partners are becoming more diverse. We need to reflect these perspectives to be **effective**.

This is **hard work**, but philanthropy has a track record of tackling tough challenges—and we again have an opportunity to lead the way.

We are a **growing movement** in philanthropy striving to ensure that those who have been historically excluded are at the decision-making table and reflected in our portfolios. By bringing **new voices** and expertise to the table, we can make our foundations more effective.

We've got four big goals: recruit diverse leaders; inspire foundations to take action; increase funding for diverse communities; and improve data collection to measure our progress.

How can greater diversity, equity, and inclusion benefit your foundation? Commit to an **action** plan. Go to [D5coalition.org](http://D5coalition.org) for ideas and inspiration.

*\*Visit <http://www.d5coalition.org/communication-tools/> to access the full Message Manual – and many more communications resources.*



# Winning Words

**Common good**

*Universal value*

**Advancing**

*Suggests progress*

**Greater impact**

*Better advance the mission*

**Constituencies**

*Relevant to all foundations*

**Perspectives**

*Expansive, suggests effectiveness*

**Growing movement**

*Part of something larger*

**New voices**

*Stay ahead of the curve*

**Effective**

*Ties to mission, not good nature*

**Opportunities**

*Makes equity less scary*

Questions?





## Exercise

Practice using the message to tackle a scenario.

# Story Templates

Lessons Learned Story

Impact Story

# → Example: Kelly Brown



# Mobilizing Champions for Action

# TAKE5

A movement to take action

2015 Goal

500  
actions



100 champions  
commit to Take 5

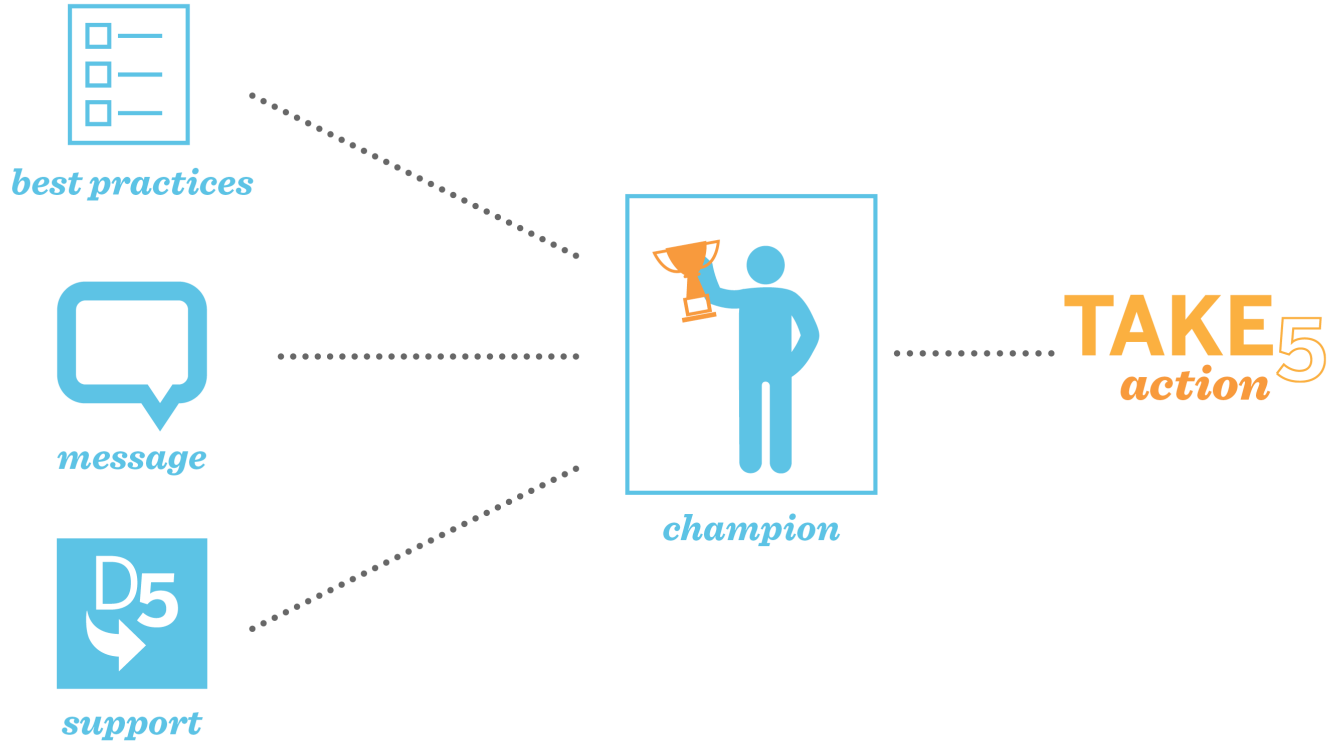


Each champion  
takes 5 actions to  
advance DEI



D5 plays the role  
of helpful guide

# Take 5: Encouraging & Supporting Action



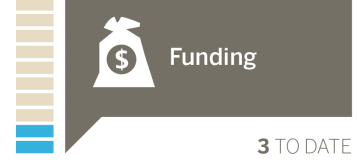
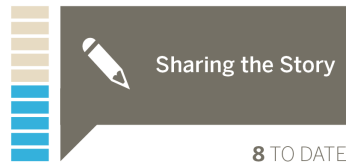


**CHAMPIONS** COMMITTED TO TAKE 5 **9** **100**

**CHAMPIONS** EXPRESSED INTEREST IN TAKE 5 **22** **100**

**ACTIONS PLEDGED** (SEE BELOW) **41** **500**

**ACTIONS PLEDGED**



# Tools for Champions

**Communications training** (in person or webinar) for your organization or network

**Self-assessment** for identifying areas of success and opportunities for growth

**Pocket-sized booklet** with key messages about DEI

**Action card** with ideas for actions you or other leaders can take

**PPP scan** with guidance on effective policies, practices, and programs

**Lots more** tools & resources at <http://www.d5coalition.org/take-5-tools/>

Questions?

What can you do to advance  
diversity, equity, and inclusion?

**TAKE<sub>5</sub>**

Visit <http://www.d5coalition.org/the-take-5-campaign/> today!