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

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
Care About the Cause
Understand the Problem
Feel a Sense of Urgency
Know How to Help

AWARENESS
ATTITUDES
ACTION
Champions: Fatigued Fighters

Define Equity Differently
Establish common definition and train the field.
Common Language on Equity

Care

Field Is Stuck
Show field is doing something new.
New Hope

Willing to Help

Willing to Help

Act or Encourage Others to Act

Engage in Take5.
Emerging Champions: Recent Enthusiasts

Unaware of DEI Efforts
Highlight progress & potential of current efforts.

Care

Understand Problem

Willing to Help

Unsure What to Do
Direct to resources and offer peer guidance.

DEI Movement is Cutting Edge

Care

Understand Problem

Willing to Help

Have Tools & Support to Make Change
Persuadables: Heartfelt Pragmatists

- Aware of D&I, Not Equity
  - Define equity consistently in all communications.
  - Understand Equity

- 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

- Aspirational
- Social
- Emotional
- Functional

Interest & Engagement
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 for ideas and inspiration.

<table>
<thead>
<tr>
<th>Winning Words</th>
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<tr>
<td><strong>Common good</strong></td>
<td>Universal value</td>
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<td><strong>Advancing</strong></td>
<td>Suggests progress</td>
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<td><strong>Greater impact</strong></td>
<td>Better advance the mission</td>
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<tr>
<td><strong>Constituencies</strong></td>
<td>Relevant to all foundations</td>
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<tr>
<td><strong>Perspectives</strong></td>
<td>Expansive, suggests effectiveness</td>
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<td><strong>Growing movement</strong></td>
<td>Part of something larger</td>
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<td><strong>New voices</strong></td>
<td>Stay ahead of the curve</td>
</tr>
<tr>
<td><strong>Effective</strong></td>
<td>Ties to mission, not good nature</td>
</tr>
<tr>
<td><strong>Opportunities</strong></td>
<td>Makes equity less scary</td>
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Questions?
Practice using the message to tackle a scenario.
Story Templates
Lessons Learned Story

Impact Story
Example: Kelly Brown
Mobilizing Champions for Action
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

- best practices
- message
- champion
- support

TAKE5 action
2015 Take 5 Goals

Champions
Committed to Take 5: 9 out of 100
Expressed Interest in Take 5: 22 out of 100

Actions Pledged (see below): 41 out of 500

Actions Pledged

- Starting the Conversation: 16 to date
- Changing Policies and Practices: 4 to date
- Shift in Grantmaking: 4 to date
- Data Collection: 6 to date
- Sharing the Story: 8 to date
- Funding: 3 to date
**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/](http://www.d5coalition.org/take-5-tools/)
Questions?
What can you do to advance diversity, equity, and inclusion?

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