Empowering People in Philanthropy to Take Action
Before we begin...

• Please mute your lines (*6 to mute your line)

• Please use the chat box for questions and comments

• At the conclusion, please take the time to fill out the survey

• We are recording this webinar to share online at www.d5coalition.org
Forum – D5 Webinar Series

Starting at 1:00 p.m. EST

December 10: Building Momentum for Data Standards to Tell Philanthropy’s Full Story
Learn how regional associations and their members are using data conversations and tools to spark efforts to advance diversity, equity, and inclusion in philanthropy, and to strengthen their grantmaking and impacts in communities.

Email to register: homar@d5coalition.org

Previous webinars available at www.d5coalition.org
Imagine philanthropy...

- achieves lasting impact by drawing on the power of diverse staffs and boards
- forges genuine partnerships with diverse communities
- increases access to opportunities and resources for all people.
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
Regional associations are leading and connecting efforts across the country and within their communities to advance DEI.
The Forum is an integrated philanthropic network comprised of 34 regional associations of grantmakers with more than 5,500 participating foundations and nonprofits.

With deep regional roots and a broad nationwide reach, the Forum Network facilitates effective philanthropy that strengthens communities and improves lives throughout the U.S.
**Substance:**
Determine what policies, practices or programs to change.

**Communications:**
Mobilize the allies & convince the decision-makers to make change.
A message to persuade

is different from

A strategy to force someone’s hand
WHAT WE DO

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

- 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.

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
Audience Mapping

Who’s the decision-maker that needs to be convinced?

Who influences that person?

What allies inside or outside the organization can you mobilize?

How can you tie DEI to something the decision-maker cares about?

When is the right moment to bring this up?
A Message to Inspire Action
Approach: Aspirational Communications Model

- Aspirational
- Social
- Emotional
- Functional
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.

*Visit http://www.d5coalition.org/communication-tools/ to access the full Message Manual – and many more communications resources.
<table>
<thead>
<tr>
<th>Winning Words</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Common good</td>
<td>Universal value</td>
</tr>
<tr>
<td>Advancing</td>
<td>Suggests progress</td>
</tr>
<tr>
<td>Greater impact</td>
<td>Better advance the mission</td>
</tr>
<tr>
<td>Constituencies</td>
<td>Relevant to all foundations</td>
</tr>
<tr>
<td>Perspectives</td>
<td>Expansive, suggests effectiveness</td>
</tr>
<tr>
<td>Growing movement</td>
<td>Part of something larger</td>
</tr>
<tr>
<td>New voices</td>
<td>Stay ahead of the curve</td>
</tr>
<tr>
<td>Effective</td>
<td>Ties to mission, not good nature</td>
</tr>
<tr>
<td>Opportunities</td>
<td>Makes equity less scary</td>
</tr>
</tbody>
</table>
Questions?
Story Templates
What goal were you trying to achieve?

How did DEI relate to that goal? Did you miss making the connection?

When did you realize you had made a mistake?

How did you respond?

What lesson did you learn that affects your work today?
Describe the foundation who chose to advance DEI: What is their mission?

What aspect of DEI did they focus on – and why?

How did they do it?

How did it impact grantees?

How did it help them better achieve their mission?
Mobilizing Champions for Action
A movement to take action
Take 5: Encouraging & Supporting Action

- Best practices
- Message
- Support

champion

TAKE action

D5
I PLEDGE TO

Check the boxes next to the actions you pledge to take to advance diversity, equity, and inclusion in the field of philanthropy.

☐ Schedule a formal conversation, such as putting DEI on the agenda of an upcoming board or staff meeting

☐ Arrange a panel dedicated to advancing DEI at an upcoming conference

☐ Conduct a DEI organizational audit and set goals based on the results

☐ Make my commitment to DEI explicit in mission and external communications

☐ Improve my DEI data collection and be transparent about the results

☐ Make DEI an explicit criterion for recruiting staff, board members, consultants, or investment managers

☐ Use my social media channels to promote examples I see of organizations advancing DEI

☐ Participate in a training, such as a cultural competency training, conducted by D5 or a partner organization

☐ Make a grant to support the work of an organization working to advance DEI

☐ Share DEI success stories through blogs and op-eds

☐ Make DEI an explicit part of my grantmaking policies

☐ Create or contribute to a population-focused fund

☐ Recruit diverse donors

☐ Meet with a colleague at another foundation to discuss ways to advance DEI

☐ Participate in efforts to strengthen field-wide data collection systems

OTHER
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/
What can you do to advance diversity, equity, and inclusion? TAKE5

Visit http://www.d5coalition.org/the-take-5-campaign/ today!
Questions?
Visit www.D5coalition.org:
- Access a wide range of supportive resources
- Learn about and get involved with Take 5
- Sign-up for our mailing list, newsletter and e-alerts

Visit www.givingforum.org:
- Access resources

Next (and final) Webinar – Starting at 1 p.m.
Dec. 10: Building Momentum for Data Standards to Tell Philanthropy’s Story

Email Hafizah Omar for more information or to rsvp: homar@d5coalition.org
谢谢  Maraming salamat  Merci  Gunalcheesh  Thank you  Gracias

For follow-up inquiries or to register for the next webinar, please contact Hafizah Omar with the D5 Coalition at: homar@d5coalition.org.