



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**

➔ Vital Partners for D5 & the Field

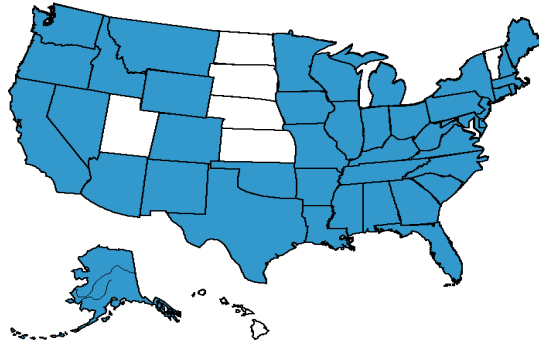
Regional associations are **leading** and **connecting** efforts across the country and within their communities to advance DEI.





The Forum

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.



How Communications Supports Change

Substance:

Determine what policies, practices or programs to change.

Communications:

Mobilize the allies & convince the decision-makers to make change.

How Communications Supports Change

A message to persuade

is different from

A strategy to force someone's hand

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**



Audience Mapping

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

Who influences that person?

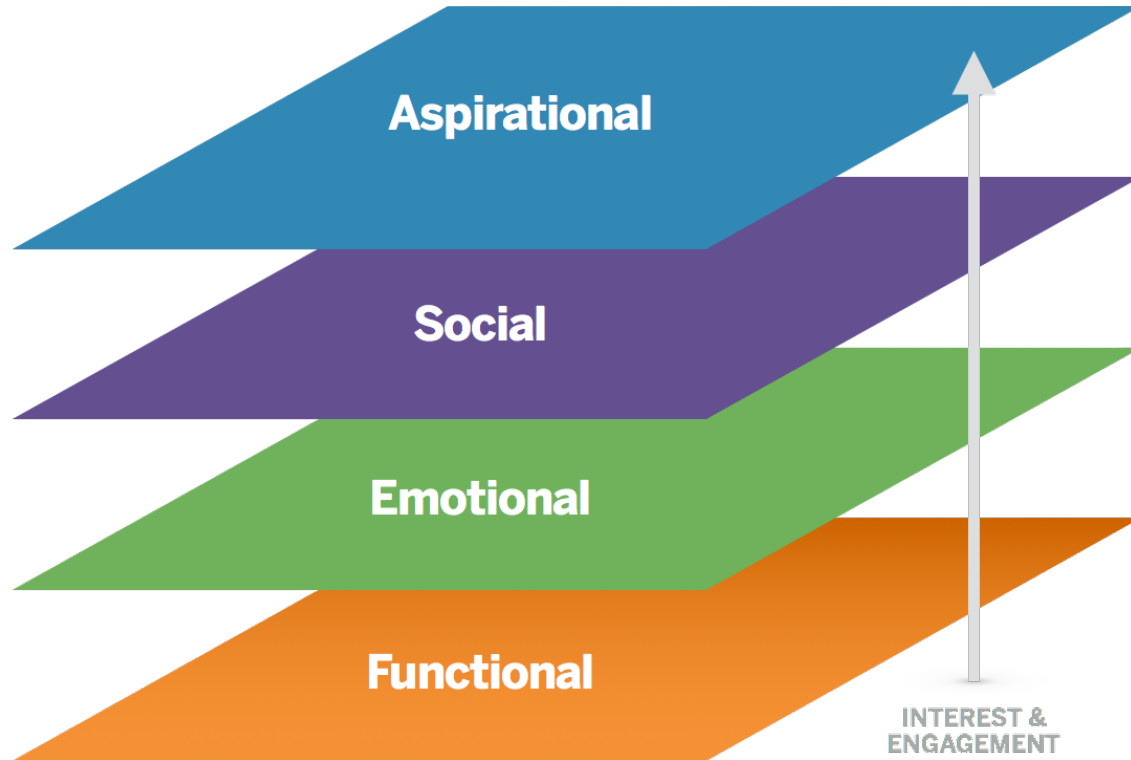
What allies inside or outside the organization can you mobilize?

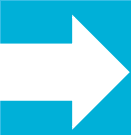
How can you tie DEI to something the decision-maker cares about?

When is the right moment to bring this up?

A Message to Inspire Action

Approach: Aspirational Communications Model





One-Minute 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 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?

Story Templates



Lessons Learned Story

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?

Impact Story

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?

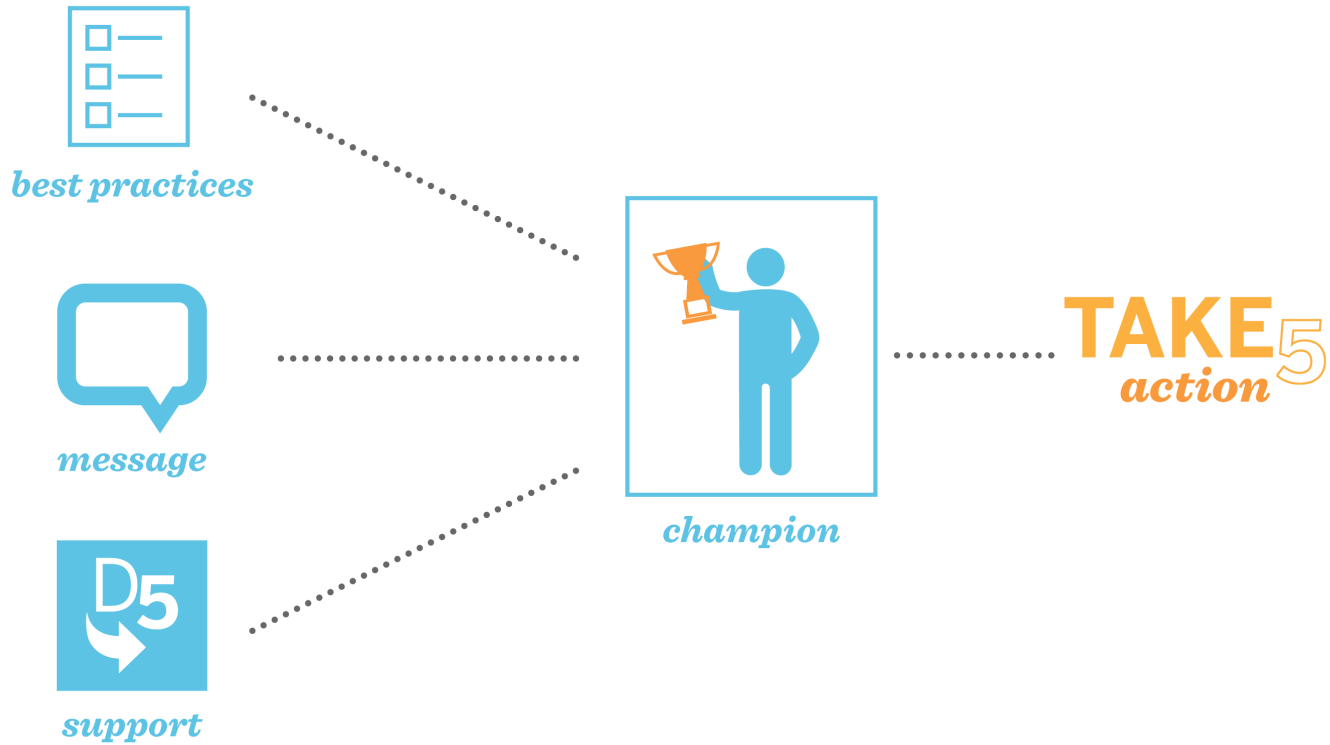
How did it help them better achieve their mission?

Mobilizing Champions for Action

TAKE5

A movement to take action

Take 5: Encouraging & Supporting Action



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



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/>

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.