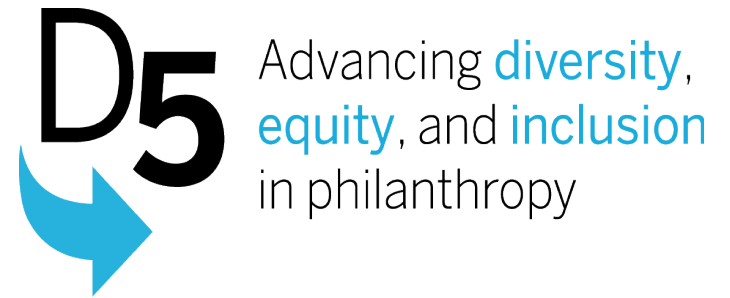




Building Momentum for Data Standards to Tell Philanthropy's Full Story

Presented by:

- | | |
|--------------|--|
| Kelly Brown | D5 |
| Mike Litz | Forum of Regional Associations of Grantmakers |
| Larry McGill | Foundation Center |
| Evan Paul | GuideStar |
| Joyce White | Grantmakers of Oregon and Southwest Washington |



Kelly Brown
Director, D5 Coalition

Before we begin...

- Please mute your lines (*6 to mute your line)
- Please use the chat box to ask questions
- 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

All available at D5coalition.org

September 24, 2014: Regional Associations Advancing Issues at the Core of All Philanthropy

Many regional associations have taken leadership roles in initiating and sustaining efforts to advance diversity, equity, and inclusion (DEI). This webinar will explore work that regional associations have done in this area and some of the lessons learned, including how DEI work enhances the leadership role of regional associations and the benefits they offer to members





October 22: Vision and Voice: The Role of Leadership and Dialogue in Advancing Diversity, Equity, and Inclusion

Philanthropy Northwest will share its findings from a research study that explored the complex factors and opportunities that foundation leaders navigate to advance diversity, equity, and inclusion in their foundations.

November 19: Empowering People in Philanthropy to Take Action

This webinar will draw upon research conducted by D5 that sheds light on how change happens, specific strategies and resources for taking action, and winning words to start and sustain conversations about diversity, equity, and inclusion.

Four Big Goals

-  1. Recruit diverse **leaders** for foundations—including CEOs, staff, and trustees
-  2. Increase **funding** for diverse communities and ensure that foundations offer all constituencies equal opportunity to access the resources they need
-  3. Improve **data** collection and transparency so we can measure progress
-  4. Identify the best **actions** we can take in our organizations to advance diversity, equity, and inclusion



D5's Focus

- D5 is knitting together a variety of efforts to ensure alignment and coordination, and keep the momentum moving forward and aligned
- Three areas of work:
 1. Developing and piloting diversity data standards
 2. Aligning with other philanthropic data efforts
 3. Increasing the will and commitment to collect demographic data

D5's data partners include:

- Foundation Center
- Forum of Regional Assoc. of Grantmakers
- GuideStar
- Green 2.0
- Regional associations, including Donors Forum, GOSW, Indiana Philanthropy Alliance, and Philanthropy New York
- Council on Foundations
- Grants Managers Network
- Cultural Data Project
- Marga, Inc.
- Joint Affinity Groups
- Range of foundations (Chicago Community Trust, Rockefeller Brothers Fund, The California Endowment, among many others)

Today's Conversation

- [Joyce White](#)
Grantmakers of Oregon
and Southwest Washington
- [Mike Litz](#)
Forum of Regional
Associations of
Grantmakers
- [Larry McGill](#)
Foundation Center
- [Evan Paul](#)
GuideStar



GRANTMAKERS
of Oregon and Southwest Washington



FORUM
OF REGIONAL
ASSOCIATIONS
OF GRANTMAKERS



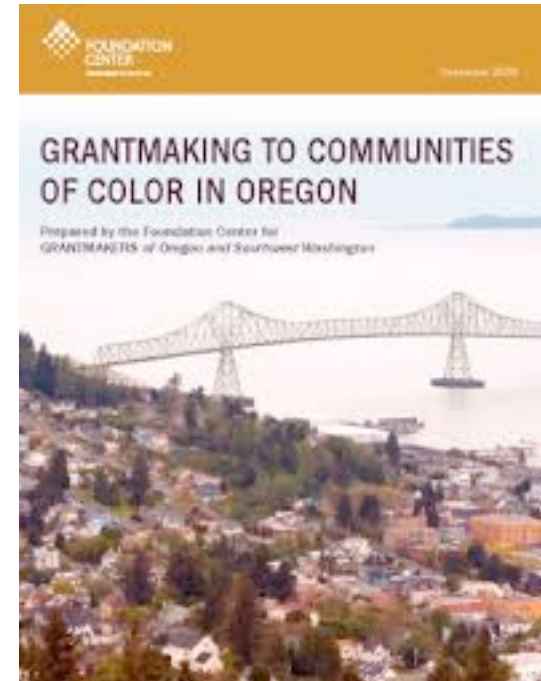
FOUNDATION
CENTER



GUIDESTAR®

Grantmakers of Oregon and Southwest Washington

- Use race, equity, and inclusion lens in all program work and governance activities
- Data work focused on constituent data grew out of report on Giving to Communities of Color:
 - Report revealed significant racial inequality; served as basis to expand support for equity initiative
 - Changed the conversation across the community
 - Shifted funding and programs toward equity issues



"The visual representation of disparities in the report's graphics was a powerful wake-up call – it was shocking and gave us a sense of urgency around equity issues."
- Data Work Group Member

Grantmakers of Oregon and Southwest Washington

- Data work has built considerable momentum, leading most recently to a meeting with our Governor's office to discuss standardizing data in the public and private sectors
- Some of our lessons learned:
 1. Data can be a driver of change
 2. Change efforts need a backbone organization – GOSW played the role of convener and communicator, linking to the national sector and dedicating time to the effort
 3. Common taxonomy - that is adaptable to the specific needs of an organization – makes it possible to get an accurate picture

"I think asking an organization to measure their diversity, equity, and inclusion is an intervention. It's not the whole intervention, but just asking the questions starts people thinking about it."
- Foundation CEO

[HOME](#) » [HOW GOSW'S QUEST FOR DATA LED TO A NEW FORUM NETWORK PARTNERSHIP](#)

How GOSW's Quest for Data Led to a New Forum Network Partnership

TUESDAY, OCTOBER 7, 2014

Joyce White of [Grantmakers of Oregon and Southwest Washington](#) (GOSW) has authored a guest blog post on the Foundation Center's [Philantopic blog](#) detailing GOSW's history working with the Foundation Center and the steps that lead to yesterday's [announcement](#) of a strategic alliance between the Forum Network and the Foundation Center. In her post, White says:

"Simply put, regional associations of grantmakers can play a critical role in building the information infrastructure that supports a more vibrant and effective nonprofit sector. We can help to harness the grants data of nearly six thousand funders and centralize it in a way that makes it more readily available to inform every aspect of our work – from collaborations, to research, to due diligence, to strategic investments."

That clarion call has resonated with the Forum Network as yesterday's announcement was greeted with hardy congratulations, excitement, and plenty of re-tweets. After considering GOSW's successful collaboration with the Foundation Center to capture and visualize giving in Oregon, she asks, "What have we accomplished?" The answer:

"What started out as a single regional association trying to provide its members with better data turned into a great and mutually beneficial collaboration with Foundation Center. It's a great example of the stars aligning, the right people showing up at the right time, and everyone working together to get it done. Given the difference in our organizational sizes, budgets, missions, locations, and resources, we might seem an odd group. But it worked, and we're not done figuring out how to build on what we have learned.

"In fact, today we are announcing a strategic alliance between the Forum of Regional Associations of Grantmakers and Foundation Center to improve the quality and effectiveness of grantmaking through the strategic collection and sharing of data on philanthropy. We are truly excited to see partnerships that regionals like my organization have individually developed with Foundation Center broaden into a collaboration around philanthropy data, research, and tools that are national in scope and that will introduce efficiencies to the field and increase its impact."

Read White's full post [here](#).

FIND MORE BY:



Recent News

[Remembering Ernie Gutierrez](#)

Monday, November 10, 2014

We are saddened to announce that Ernie Gutierrez, former Acting President of the Forum, passed away on November 3, 2014 of... [more](#)

[NCG Announces Expansion in Membership](#)

Monday, November 10, 2014

Over the past year, Northern California Grantmakers (NCG) has been implementing a new strategic direction that has emphasized the... [more](#)

[Hot Topics for RA Staff Members](#)

Wednesday, November 5, 2014

It's planning season at most regional associations. Each month, we take a look at the resources most frequently accessed by... [more](#)

[Ms. Moore Goes to Dreamforce](#)

Tuesday, November 4, 2014

by Courtney Moore, Member Services Manager During the week of October 13-16, over 135,000 descended upon downtown San Francisco... [more](#)

[More News](#)

“Get on the Map” Campaign



Doing Good, Done Better

REGIONAL TOOLKIT

Messaging

DIY instructions

DIY checklist/goal sheet

Communications calendar planning tool

eReporting instructions

eReporting cheat sheet/phone list

Website language

Presentation talking points

Introductory remarks for public events

Calls from podium

Email content

Newsletter content

Premade FB posts, tweets

Map launch messaging

Testimonials

Graphics

Campaign logo (color and b&w, eps and jpg)

Foundation Maps screenshots

Website marquee

Email header and footer

Brochure/one-pager

Mail insert/post card



Who is interested so far?

- Associated Grant Makers
- Association of Baltimore Area Grantmakers
- Connecticut Council for Philanthropy
- Council of Michigan Foundations
- Council of New Jersey Grantmakers
- Donors Forum (Illinois)
- Donors Forum of Wisconsin
- Florida Philanthropic Network
- Grantmakers Forum of New York
- Grantmakers of Oregon and SW WA
- Grantmakers of Western Pennsylvania
- Indiana Philanthropy Alliance
- Iowa Council on Foundation
- Maine Philanthropy Center
- North Carolina Network of Grantmakers
- Northern California Grantmakers
- Philanthropy Network Greater Philadelphia
- Philanthropy Ohio
- Philanthropy New York
- Philanthropy Southwest
- Philanthropy West Virginia
- San Diego Grantmakers
- Southeastern Council of Foundations
- Southern California Grantmakers
- Washington Regional Association of Grantmakers

Vital Partners for D5 and the Field

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

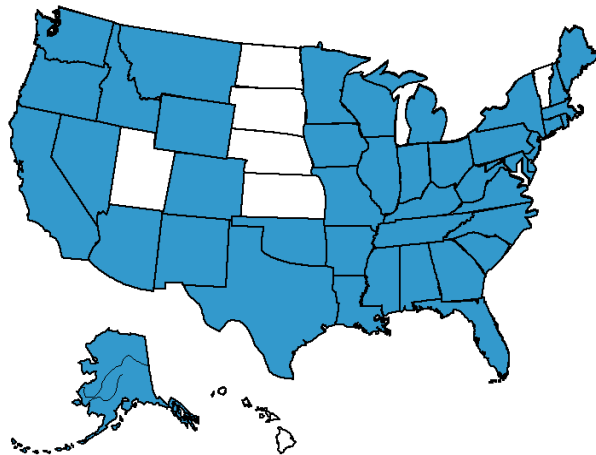


Informing Grantmakers, Improving Our Community



The Forum

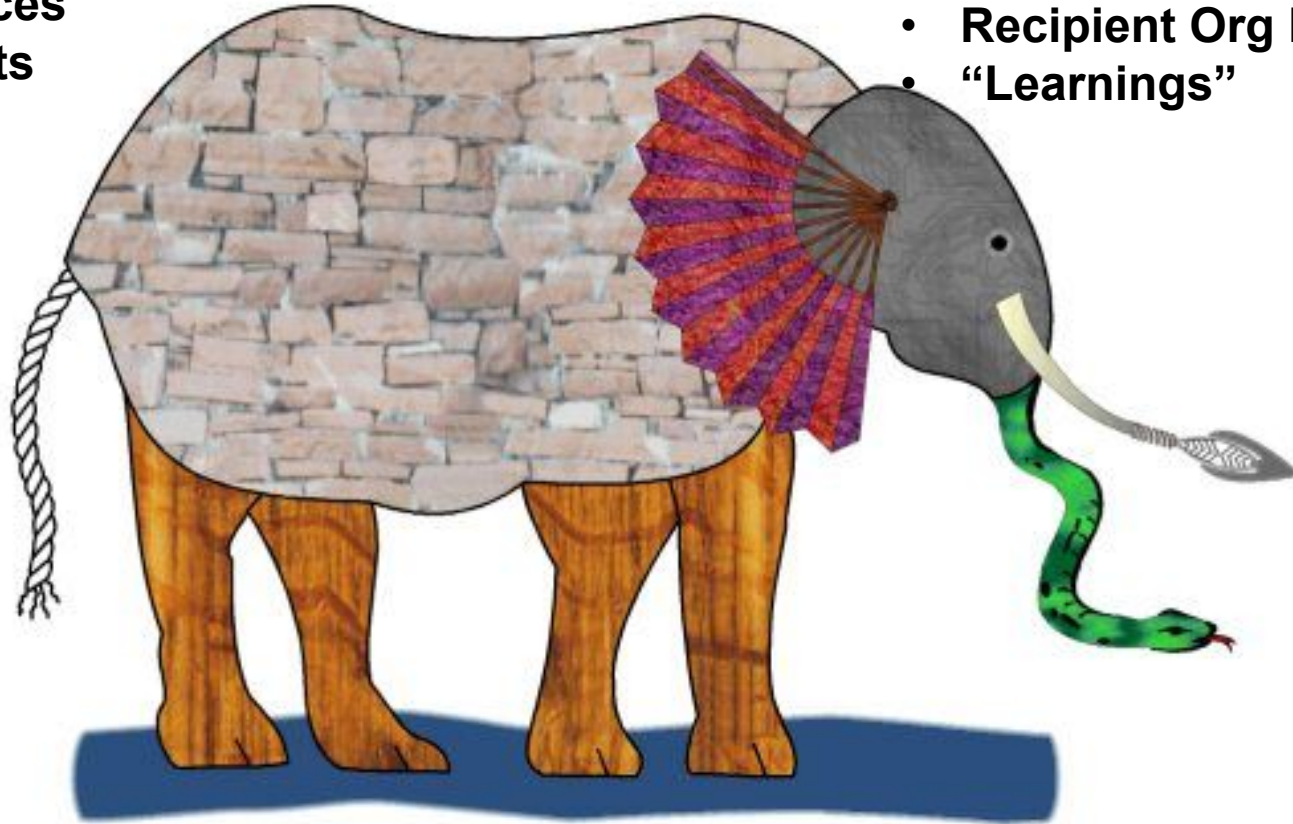
The Forum is an integrated philanthropic network comprised of 34 regional associations of grantmakers with more than 5,500 participating foundations and nonprofits.



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.

COUNCIL ON FOUNDATIONS

- **Staff & Board Composition**
 - Some foundations
- **Salaries & Benefits**
- **Mgt Practices**
- **Investments**



FOUNDATION CENTER

- **Foundation Profiles**
 - All foundations
- **Processed Grants Data**
 - Selected Foundations
- **Recipient Org Data**
- **“Learnings”**

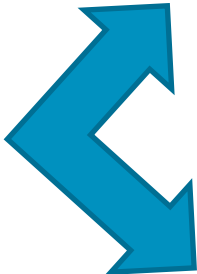
REGIONAL ASSOCIATIONS

- **Member Data**
- **Idiosyncratically-processed Grants Data**
 - Regional Foundations
- **“Learnings”**

INTERNAL REVENUE SERVICE

- **Raw Financial Data**
- **Raw Grants Data**
- **990's & 990-PF's**

Idea: What If We Worked Together?



2007 2008 2009 2010 2011 2012 2013 2014



**Populations Served Demographic Data Collection Template:
Where Do Foundation Grants Go?
May 29, 2014**

Introduction

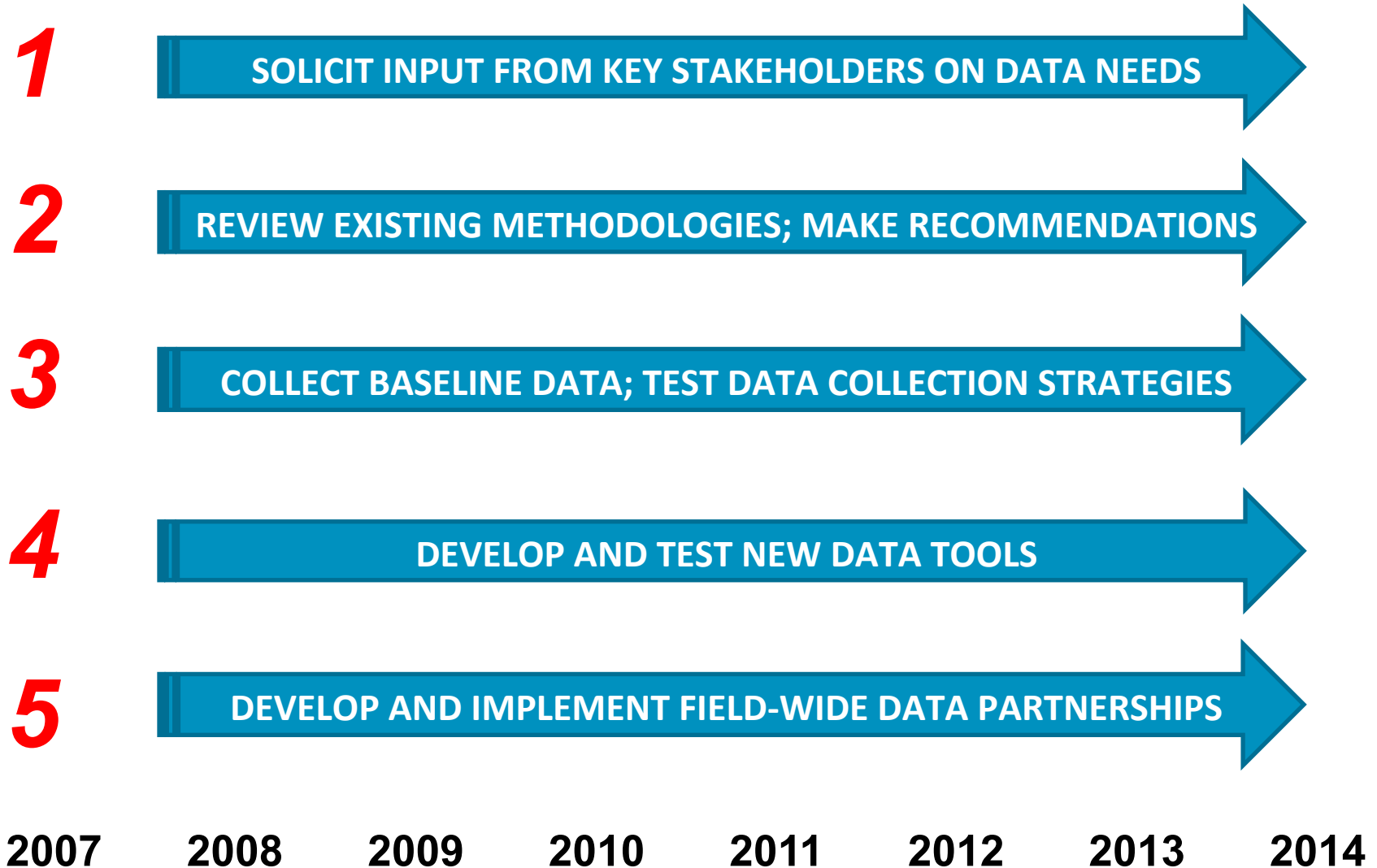
D5 is charged with facilitating the development and adoption of demographic data standards. This template offers an approach for collecting data about the *populations served* by foundation grants, and was compiled with the input of a broad constellation of foundations.¹ It is one step toward achieving the larger goal of a systemic approach for collecting and disseminating standardized demographic data of grant recipient organizations and the communities they serve.

Employing a *set of standard categories* for the collection and reporting of data will ensure broad comparability of data across a consistent set of basic categories, enabling foundations to *benchmark* their activities relative to peers. A separate template has been prepared to collect demographic information on who works in and leads nonprofit organizations and foundations.

Principles

The template provides a structure for foundations to collect individual data in a way that can be fed into a widely shared national taxonomy. The data collection template offered in this document has been designed with the following principles in mind:

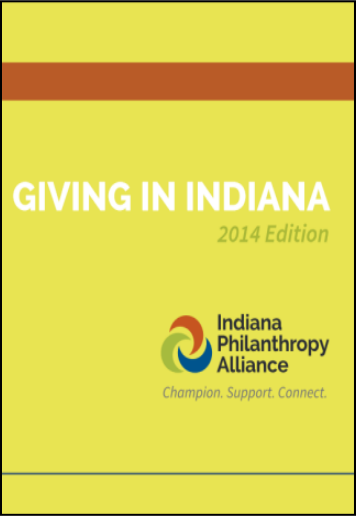
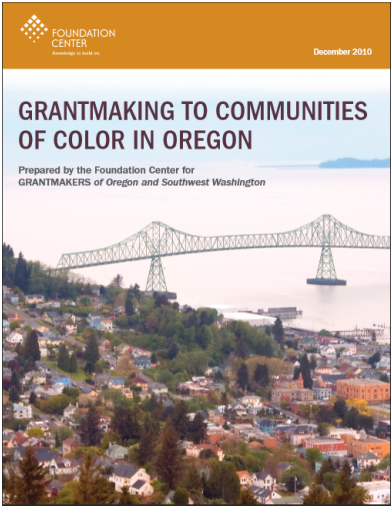
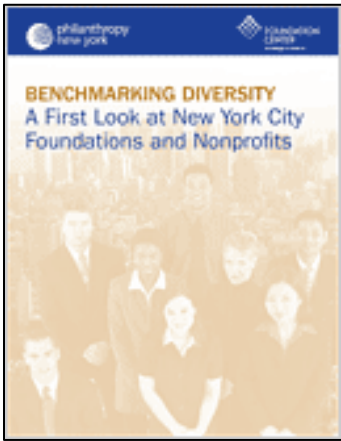
How We Got to This Point



3

COLLECT BASELINE DATA; TEST DATA COLLECTION STRATEGIES

National
Baseline
Study
(2008)



2007

2008

2009

2010

2011

2012

2013

2014

GuideStar's Diversity, Equity, and Inclusion (DEI) Data Collection Efforts

Evan Paul
VP, Products
December 2014

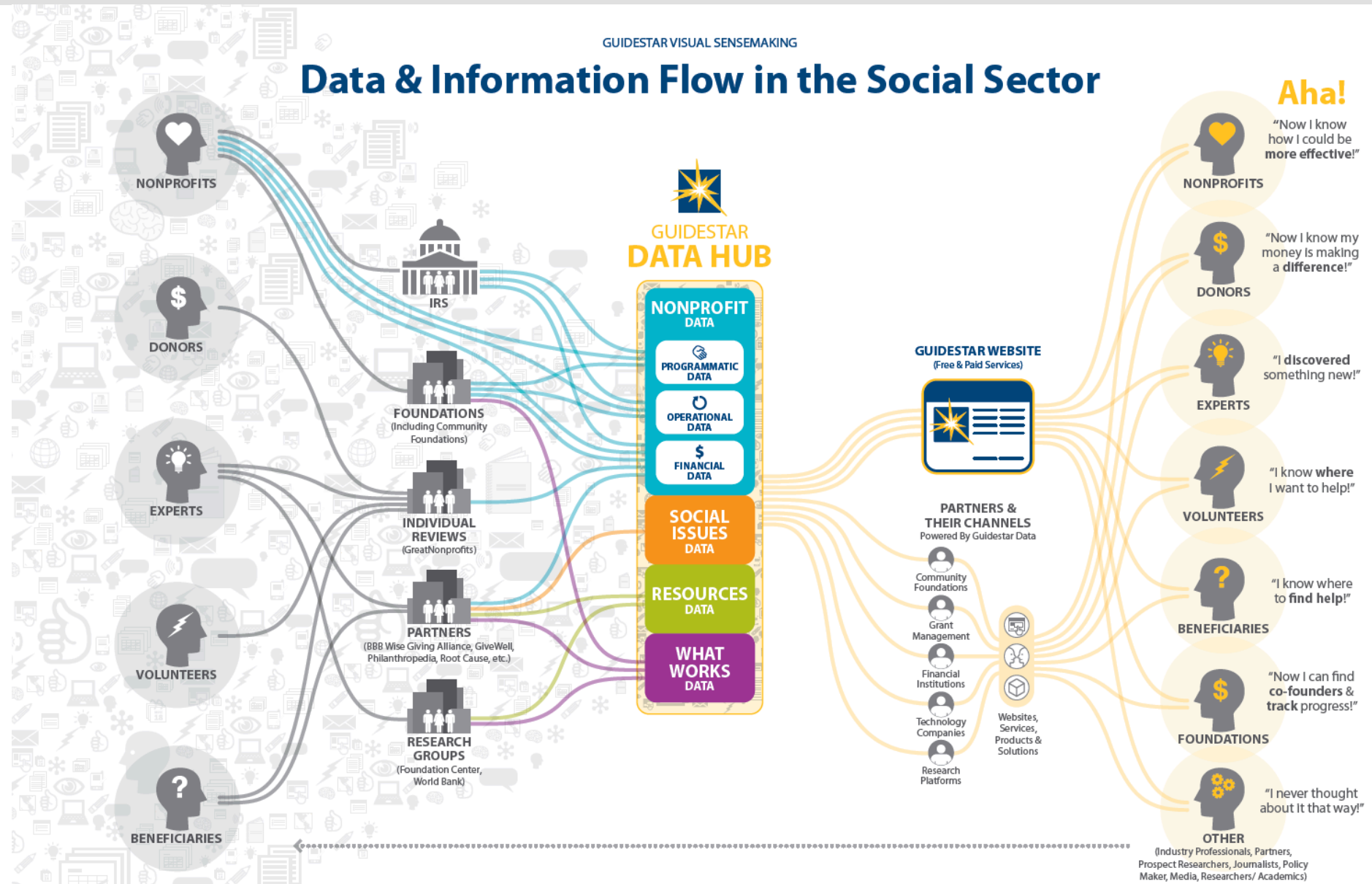


GUIDESTAR'S STRATEGIC PLAN

GuideStar is working to create a field-wide infrastructure for nonprofit data collection and sharing

GUIDESTAR VISUAL SENSEMAKING

Data & Information Flow in the Social Sector



THE GUIDESTAR EXCHANGE

We created the GuideStar Exchange program to enable nonprofits to self-report and launched a new 3-tier system in June 2013



Quantitative programmatic impact and effectiveness data



Qualitative impact and effectiveness information



Financial information



Basic information such as contact information, mission statement, etc.

Key Partners:



Here's what the D5 data entry interface looks like:



GUIDESTAR

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Welcome Sarah Madden! [Sign Out](#)

[Update Nonprofit Report](#)

[Analyze Nonprofit Data](#)

[Give to Charity](#)

[Review A Charity](#)

GuideStar Exchange Form for

GuideStar USA, Inc.

EIN: 54-1774039

Live Chat offline - [Send Message](#)

[How to Update Your Nonprofit Report](#) [FAQs](#)

[Review](#)

[General](#)

[Financials](#)

[People & Governance](#)

[Mission & Programs](#)

[Additional Documents](#)

[Impact](#)

[Confirm & Submit](#)

[Primary Contact](#)

[Leadership](#)

[Board Members](#)

[Board Leadership Practices](#)

[Other Staff](#)

[Organizational Demographics](#)

Organizational Demographics

Organizations need to understand how populations are changing, and change with them. This section enables the sharing of information about the demographics of who works in and leads organizations, which can be used to spark conversation, reflection, and action about how best to ensure that organizations are responsive to everyone in our society. GuideStar worked with D5, a five-year initiative to advance diversity, equity, and inclusion in philanthropy, to create this section, which enables organizations and donors to transparently share information about staff, board, and volunteer demographics.



How many Board Members, Staff Members [?], Senior Staff, and Volunteers does your organization have in the following categories?

	Board Members	Staff Member (full time)	Staff Members (part time)	Senior Staff (full time)	Volunteers
Female	# <input type="text"/>	# <input type="text"/>	# <input type="text"/>	# <input type="text"/>	# <input type="text"/>
Male	# <input type="text"/>	# <input type="text"/>	# <input type="text"/>	# <input type="text"/>	# <input type="text"/>
Transgender [?] /Unspecified non-conforming	# <input type="text"/>	# <input type="text"/>	# <input type="text"/>	# <input type="text"/>	# <input type="text"/>
Unknown/declined to state	# <input type="text"/>	# <input type="text"/>	# <input type="text"/>	# <input type="text"/>	# <input type="text"/>
Total	0	0	0	0	0

Here's what the D5 data entry interface looks like:

How many Board Members, Staff Members [?], Senior Staff, and Volunteers in your organization identify as the following?

	Board Members	Staff Member (full time)	Staff Members (part time)	Senior Staff (full time)	Volunteers
Lesbian, gay, bisexual	<input type="text" value="#"/>	<input type="text" value="#"/>	<input type="text" value="#"/>	<input type="text" value="#"/>	<input type="text" value="#"/>
Unknown/declined to state	<input type="text" value="#"/>	<input type="text" value="#"/>	<input type="text" value="#"/>	<input type="text" value="#"/>	<input type="text" value="#"/>

How many Board Members, Staff Members [?], Senior Staff, and Volunteers in your organization identify as the following?

	Board Members	Staff Member (full time)	Staff Members (part time)	Senior Staff (full time)	Volunteers
Person with a disability	<input type="text" value="#"/>	<input type="text" value="#"/>	<input type="text" value="#"/>	<input type="text" value="#"/>	<input type="text" value="#"/>
Unknown/declined to state	<input type="text" value="#"/>	<input type="text" value="#"/>	<input type="text" value="#"/>	<input type="text" value="#"/>	<input type="text" value="#"/>

How many Board Members, Staff Members [?], Senior Staff, and Volunteers in your organization identify as the following?

	Board Members	Staff Member (full time)	Staff Members (part time)	Senior Staff (full time)	Volunteers
Asian/Asian American	<input type="text" value="#"/>	<input type="text" value="#"/>	<input type="text" value="#"/>	<input type="text" value="#"/>	<input type="text" value="#"/>
Black/African American	<input type="text" value="#"/>	<input type="text" value="#"/>	<input type="text" value="#"/>	<input type="text" value="#"/>	<input type="text" value="#"/>
Hispanic/Latino/Latina	<input type="text" value="#"/>	<input type="text" value="#"/>	<input type="text" value="#"/>	<input type="text" value="#"/>	<input type="text" value="#"/>
Native American/American Indian/Alaska Native/Native Hawaiian	<input type="text" value="#"/>	<input type="text" value="#"/>	<input type="text" value="#"/>	<input type="text" value="#"/>	<input type="text" value="#"/>

Here's what the D5 data entry interface looks like:

Native American/American Indian/Alaska Native/Native Hawaiian	# <input type="text"/>	# <input type="text"/>	# <input type="text"/>	# <input type="text"/>	# <input type="text"/>
White	# <input type="text"/>	# <input type="text"/>	# <input type="text"/>	# <input type="text"/>	# <input type="text"/>
Multi-racial or multi-ethnic (2+ races/ethnicities)	# <input type="text"/>	# <input type="text"/>	# <input type="text"/>	# <input type="text"/>	# <input type="text"/>
Unknown/declined to state	# <input type="text"/>	# <input type="text"/>	# <input type="text"/>	# <input type="text"/>	# <input type="text"/>
Other: please specify <input type="text"/>	# <input type="text"/>	# <input type="text"/>	# <input type="text"/>	# <input type="text"/>	# <input type="text"/>
Add another category					
Total	0	0	0	0	0

Do you track retention of staff, board, and volunteers? Yes No

Do you track income levels of staff, senior staff, and board? Yes No

Do you track the age of staff, senior staff, and board? Yes No

Do you track the diversity of vendors (e.g., consultants, professional service firms)? Yes No

Do you have a diversity committee in place? Yes No

Do you have a diversity manager in place (i.e. designated personnel responsible for overseeing or coordinating organizational diversity efforts)? Yes No

Do you have a diversity plan? Yes No

Here's what the D5 data entry interface looks like:

In the space below, please explain anything about your demographic profile that would provide insights about the context of your work and/or organization.

Please limit your response to between 100 and 1000 characters (including spaces). Characters used: 0

Save

Save and Continue

Skip

Confirm and Submit

Why Collect Organizational Demographics?

This matrix presents **recommended standards for collecting data about the internal demographics** of organizations. The standards are recommended for nonprofits and foundations to collect data about themselves, and for foundations to collect data about the organizations they fund.

D5 worked with a wide range of partners to develop the data collection standards with the following principles in mind:

- **Scope:** The recommended standards must strike an appropriate balance between simplicity and breadth/depth of data collection. The standards are designed with a domestic focus, and do not include recommendations for international grants.
- **Adaptability:** The data standards are meant to cover a core set of demographic metrics that should be adaptable/expandable/customizable to meet the more specific data needs of specific regions or organizations. Individual organizations may choose to expand on the fields and data collection, and the fields included in the recommended standards reflect the baseline data that should be collected and shared across organizations.

A Work In Progress

While the standards have been developed with the broad participation of numerous partners including The Foundation Center, the Race and Equity in Philanthropy Group, regional associations, GuideStar among others, they are **a work in progress**. As part of the development process, several areas surfaced that need continued discussion and development, including:

- Should foundations code demographic information based on the projects funded or the organizations?
- How should universities, research grants, fiscal sponsors, and hospitals be coded?

Why collect demographic data?

Under almost all circumstances, the constituents of nonprofits and foundations are diverse across a broad spectrum of parameters. Organizations need to understand how populations are changing, and change with them. This data can be used to spark conversation, reflection, and action about how best to ensure that organizations reflect, and are responsive to, everyone in our society.

Why collect this information in a standardized way?

Unless organizations ask questions and share information in the same way, we will not be able to produce a comprehensive picture of the nonprofit and foundation sectors, or understand trends, gaps, overlaps, and opportunities. Once we start using the same language and approach to data, we will be able to strengthen our individual and collective strategies and better serve all populations in the future.

How do I collect data using the recommended standards?

D5 is presenting recommendations about the content of information to collect (i.e., gender, sexual orientation, disability), fields within those categories (e.g., male, female, transgender for gender), and about whom to collect it (i.e., board, senior staff, staff, populations served). This information may be collected in a variety of ways.

This may include voluntary surveys, annual assessments, or intake forms for clients. It is up to the individual organization to determine the best mechanism and timing for collecting the data while complying with individuals' rights to privacy

We understand that some data may be incomplete, yet we are confident that over time more individuals and organizations will become comfortable with sharing data as it becomes more common and as the benefits become clear.

Here's what the D5 data entry interface looks like:

between simplicity and comprehensiveness of data collection. The standards are designed with a domestic focus, and do not include recommendations for international grants.

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- Should foundations code demographic information based on the projects funded or the organizations?
- How should universities, research grants, fiscal sponsors, and hospitals be coded?
- How should immigrant population data be coded?
- What is the best way to capture disaggregated data for populations with meaningful internal diversity (e.g., the diversity of Asian/Asian American and tribal communities)?
- What is the best way to make the data standards compatible with grants management systems?
- How do arts and cultural institutions with broad based audiences understand their populations served?
- For future consideration, should data be collected in a standard way about age, income, staff retention, and consultant demographics? And if so, how?

D5 will continue to facilitate conversations about these issues and others as they are surfaced, and welcomes input and feedback. In recognition of the ever-changing nature of data and our understanding of how communities change, D5 recommends that demographic data standards be considered a continual work in progress and an opportunity to engage in constructive and inclusive conversations across communities and organizations.

Unless organizations ask questions and share information in the same way, we will not be able to produce a comprehensive picture of the nonprofit and foundation sectors, or understand trends, gaps, overlaps, and opportunities. Once we start using the same language and approach to data, we will be able to strengthen our individual and collective strategies and better serve all populations in the future.

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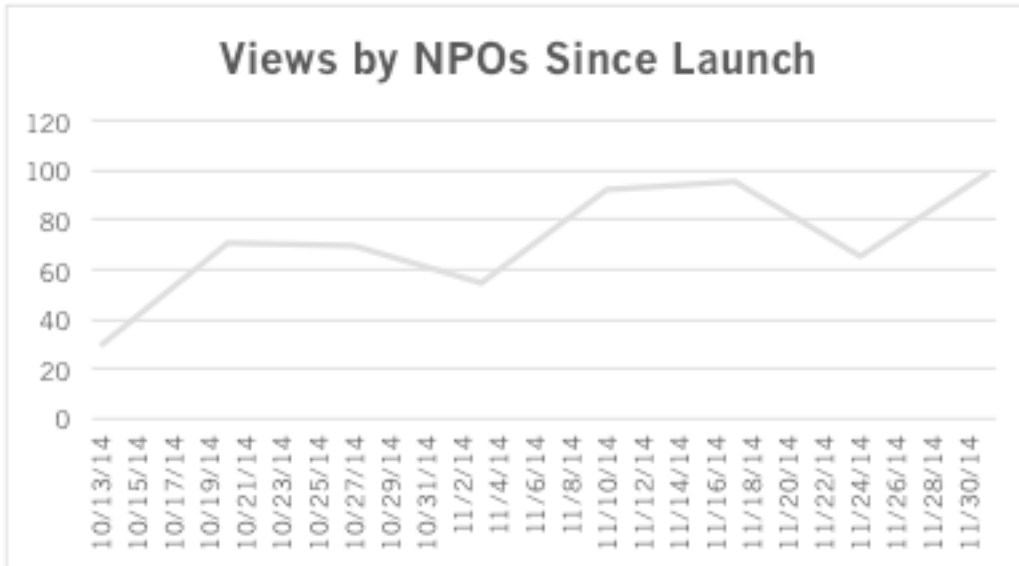
We understand that some data may be incomplete, yet we are confident that over time more individuals and organizations will become comfortable with sharing data as it becomes more common and as the benefits become clear.

Is collecting and sharing this data voluntary?

Collecting and sharing this information is voluntary - and strongly encouraged as a best practice. In an era of big data, nonprofits and philanthropy have the opportunity to use data to do their work more effectively, and we can only take advantage of this opportunity if we have consistent and comprehensive data. The more organizations that choose to share this data, the more effective our work will be.

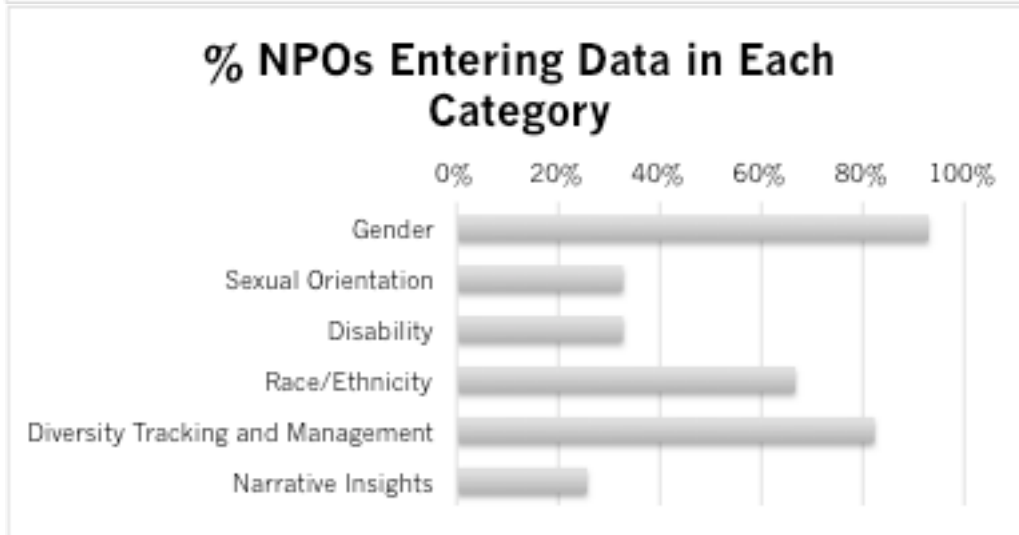
3 D5 DATA COLLECTION

Launched the D5 data fields on 10/16/14.
Here are the early results.



Participating Nonprofits to Date:

412



4 D5 DATA SHARING

Data can be used to pre-populate grant applications through the major grant management vendors. This effort is the Simplify Project.



Attend our quarterly impact calls to keep tabs of what we're doing DEI data and beyond.



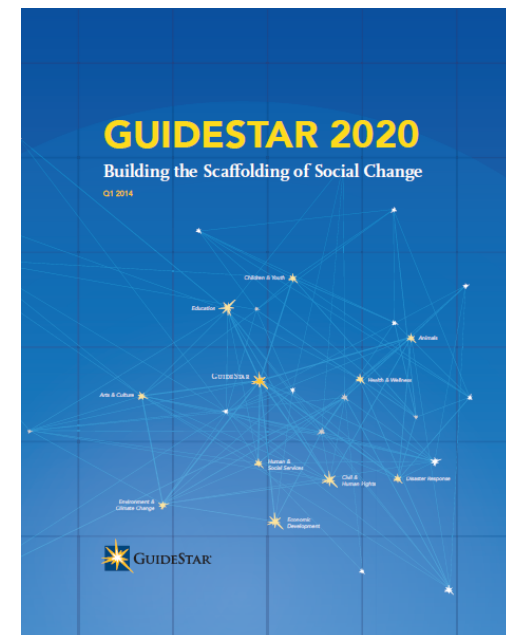
Next GuideStar Quarterly Impact Call:

February 23, 2015

2pm EDT / 11am PDT

Download our Strategic Plan at:

<http://www.guidestar.org/rxg/about-us/guidestar-strategic-plan.aspx>





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 a wide range of supportive resources
- Learn about upcoming events



谢谢 Maraming salamat Merci
Gunalcheesh Thank you
Gracias

For follow-up inquiries, please contact Hafizah Omar with the D5 Coalition at homar@d5coalition.org.