D5 Coalition: Fueling a Movement
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.
Diversity, equity, and inclusion help foundations…

- Advance the common good & achieve greater impact
- Keep up with changing consistencies
- Increase effectiveness
Better Together

D5 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

And Growing…

D5 Leadership Team

Maricela Espinoza-Garcia, AriGioio Communications
Carly Hare, Native Americans in Philanthropy
Mae Hong, Rockefeller Philanthropy Advisors
Lawrence McGill, Foundation Center
Mary O’Neill, Forum of Regional Associations
Kristopher Smith, Funders’ Network for Smart Growth and Livable Communities
Ericka Plater-Turner, Council on Foundations
Sylvia Zaldivar, Maestro Cares Foundation

And Growing…
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
Four Big Changes by 2015

1. Diverse leaders
2. More funding
3. Better data
4. Voluntary action

2015 GOAL:
- New foundation CEO, staff, and trustee appointments more closely reflect U.S. demographic trends

WORK TO DATE:
- Leadership networks in Chicago, Michigan, Pacific Northwest, Philadelphia
- Study of career paths of people of color in philanthropy
- Directory of pipeline programs

WORK UNDERWAY:
- Engagement of search firms and HR professionals
- Census of diverse trustees

progress & outcomes
Four Big Changes by 2015

1. Diverse leaders
2. More funding
3. Better data
4. Voluntary action

2015 GOAL:
• Annual funding for diverse communities increases substantially

WORK TO DATE:
• Donor Gatherings in Chicago and LA
• Population-Focused Funds (PFF) Directory
• PFF Analysis report and convening
• “We Are Philanthropy” film series

WORK UNDERWAY:
• PFF Analysis strategic dissemination
• “We Are Philanthropy” expansion and strategic dissemination
• LGBTQ donor research
Four Big Changes by 2015

1. Diverse leaders
2. More funding
3. Better data
4. Voluntary action

WORK TO DATE:
• Internal data collection profile piloted
• “Insights on Diversity” research projects launched

2014-2015 PLANS:
• Internal data collection expanded
• Non profit data collection system launched
• Constituent and grants data collection underway

2015 GOAL:
• Philanthropy has the research capacity to be more transparent about progress on DEI
Organizational Demographics

We live and work in a diverse world. In an era of infused with data, nonprofits and funders have an opportunity to use data to work more effectively. In order to support nonprofits and gain valuable insight for the sector, GuideStar worked with D5—a five-year initiative to advance diversity, equity, and inclusion in philanthropy—in creating this questionnaire.

We would like to emphasize that each of the following questions is voluntary [1]. We encourage you to view this as a tool for sharing whatever data you would like to share, not a survey where you must answer every question.

When collecting identity information, please be sure all staff and volunteers have the opportunity to self-identify on the various demographic categories anonymously. It is a best practice to always provide a “decline to state” option. No person can legally be required to complete any survey related to identity. [Click here for more guidance on responsible data collection]

<table>
<thead>
<tr>
<th>How many Board Members, Staff Members (full and part-time), Senior Staff, and Volunteers does your organization have?</th>
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<tbody>
<tr>
<td>Board Members</td>
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<tr>
<td>Total</td>
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Gender Identity

How many Board Members, Staff Members (full and part-time), Senior Staff, and Volunteers in your
Four Big Changes by 2015

1. Diverse leaders
2. More funding
3. Better data
4. Voluntary action

2015 GOAL:
- More foundations take meaningful action to address diversity, equity, and inclusion issues in their organizations

WORK TO DATE:
- Message for the field on DEI developed
- Comprehensive scan of best programs, policies, and practices (PPP)

WORK UNDERWAY:
- PPP scan dissemination
- Communications trainings
- Research on DEI consultants and resource development
- Affinity group engagement
Policies, Practices, and Programs Resource Guide

The following resources have proved useful for foundation leaders who have taken steps to advance diversity, equity, and inclusion in their institution. They are organized by task to help you: 1) make the case that DEI is important; 2) write DEI into your policies; 3) implement strong DEI practice into your programs and your operations; and 4) monitor your work to ensure accountability.

These resources and more can be found in D5’s Tools & Resources Library.

Making the case
- Crafting policy
- Implementing operational and programmatic practice
- Monitoring for accountability

Translating Complexity Into Effective Practice

Tags: action; human resources; OMG Center: policies and practices

This 2013 issue brief by philanthropic advisor OMG Center for Collaborative Learning describes the process undertaken by this 30-year old consulting practice to institutionalize organizational policies that build and support staff to carry out work that is committed to diversity, equity, and inclusion.
D5 Work with Regionals

7 Original Regional Assoc. Partners
- Philanthropy Northwest
- Philanthropy New York
- Council of Michigan Foundations
- Ohio Grantmakers
- Minnesota Council of Foundations
- Donors Forum
- Associated Grantmakers

Emerging Partners
- Grantmakers of Oregon and Southwest Washington
- Tampa Bay Funders
- Philanthropy Southwest
- Northern CA Grantmakers

And counting......

Range of work
- Major Research
- Member programs and presentations
- Communications trainings
- Data Collection Pilots
- Leadership Networks
Discussion
• What are the pressing diversity, equity and inclusion issues for Tampa funders?

• What are the perceived barriers?
Inspiring Action: Motivating Message & Take 5 Campaign
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)
Audience Segments

Champions: Fatigued Fighters
Emerging Champions: Recent Enthusiasts
Persuadables: Heartfelt Pragmatists
Skeptics 1: Pro-Diversity Regulators
Skeptics 2: Rugged Individualists
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
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
- support

champion

TAKE5 action
Where are the opportunities to move work on these issues?

Who are the allies?
Things you can do ……

1. Consider joining Take 5 Campaign to get support to further specific action within your foundation

2. Look at resources and trainings to go deeper on data, equity, leadership or communications

3. Urge your foundation to participate in data collection efforts such as Get on the Map and the GuideStar Exchange to strengthen and streamline philanthropy’s capacity to understand its impact

4. Brainstorm potential non-traditional allies and engage them in strategic conversations

5. Take the next step……..

Learn more and access more resources at www.d5coalition.org
STRUCTURING THE CONVERSATION

1. Introduce D5 and say why this work is important to you personally.
2. Define diversity, equity, and inclusion.
3. Ask them what they've done so far.
4. Brainstorm possible next steps.
5. Seek a commitment.

GUIDING QUESTIONS

1. Build on Success
   - What has your foundation done to advance DEI? What would you like to do next?
2. Identify
   - How can you get these challenges into your first few meetings?
3. Create a Plan to Tackle These Challenges
   - How can you get these challenges into your first few meetings?
4. Offer Assistance
   - How can you get these challenges into your first few meetings?

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

NAME
TITLE
ORGANIZATION
EMAIL
I COMMIT TO:

ACTION MENTOR

While a key goal of your conversations will be to identify and engage the person you're talking with, here are a few ideas for action:

- Schedule a focus conversation, such as a meeting or small meeting with an upcoming sponsor or partner.
- Conduct a DEI organizational audit and set goals based on the results.
- Make your commitment to DEI explicit in processes and external communications.

- Participate in a training, such as a cultural competency training or a DEI training.
- Make a grant to support the work of an organization working to advance DEI.
- Make DEI an explicit part of your grantmaking policies.
- Create or contribute to a population-focused fund.
- Recruit diverse donors.