

Before we begin...

- **Please mute your lines**
- **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**

D5


TAKE5
Campaign

Empowering people in philanthropy to take action on DEI

➔ 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, San Antonio Area Foundation

Carly Hare, Native Americans in Philanthropy

Mae Hong, Rockefeller Philanthropy Advisors

Lawrence McGill, Foundation Center

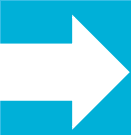
Ericka Plater-Turner, Council on Foundations

Kristopher Smith, Funders' Network for Smart Growth and Livable Communities

Sylvia Zaldivar-Sykes, Lake County Community Foundation

Michael Litz, Forum of Regional Associations of Grantmakers

And Growing...



What is Take 5?

TAKE5

A principle-based 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

Potential Actions to Advance DEI

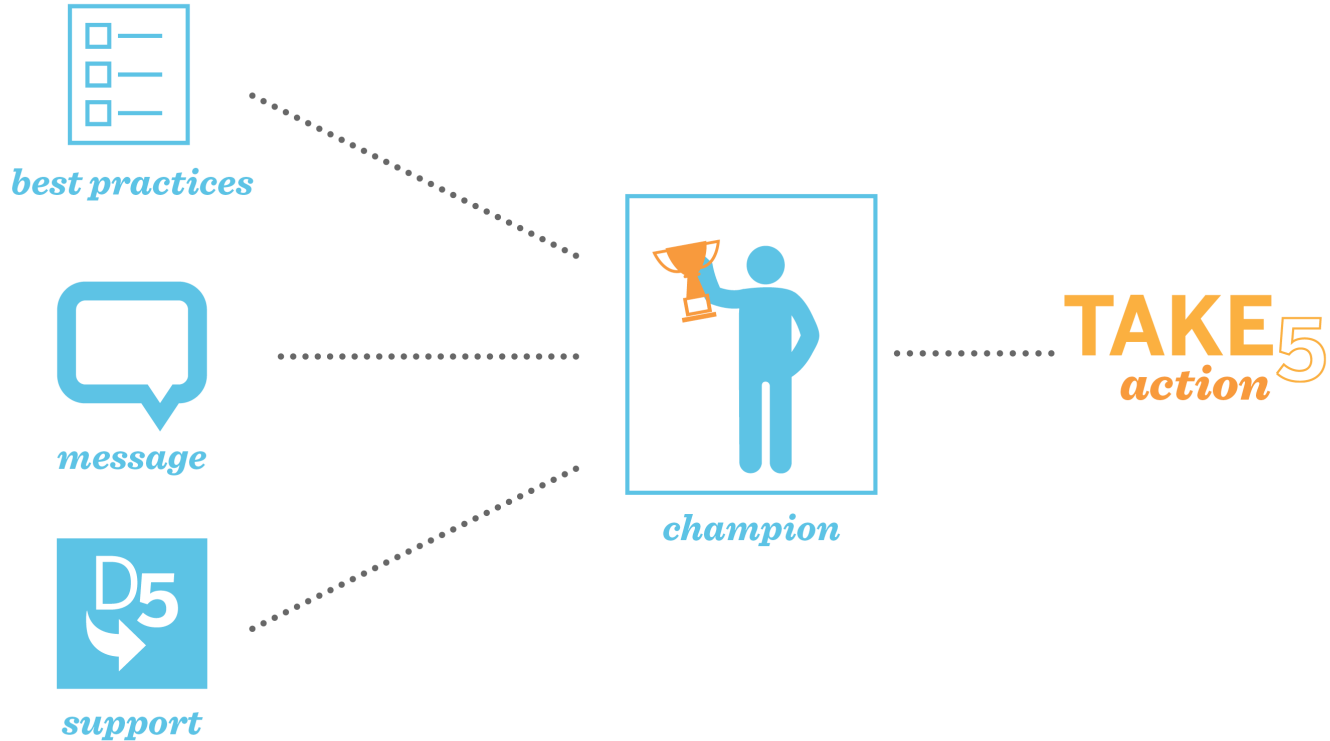
I PLEDGE TO

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

Take 5: Encouraging & Supporting Action



Questions?

Audiences & Objectives



Audiences

Research helped identify key audiences...

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

Persuadables: Heartfelt Pragmatists

AWARENESS



Current State:
Don't understand equity/ Don't know who my portfolio serves

Desired State:
Common understanding of equity and how it applies to my constituency

Strategic Action Items:
Define equity in every communication, and show surprising facts about changing communities.

ATTITUDES



Current State:
Care about diversity & inclusion



ATTITUDES



Current State:
Don't see how DEI is relevant to my foundation's work

Desired State:
DEI is relevant to effectively carrying out my mission

Strategic Action Items:
Prove the effectiveness case through research and tell (surprising) stories about foundations that became more effective because of DEI.

ACTION



Current State:
Don't see the urgency for action

Desired State:
Recognize my constituency is changing, feel peer pressure

Strategic Action Item:
Ask questions about constituencies to prompt thinking, showcase the commitments of other foundations, and mobilize peers to ask for commitment (i.e. Take 5).

ACTION



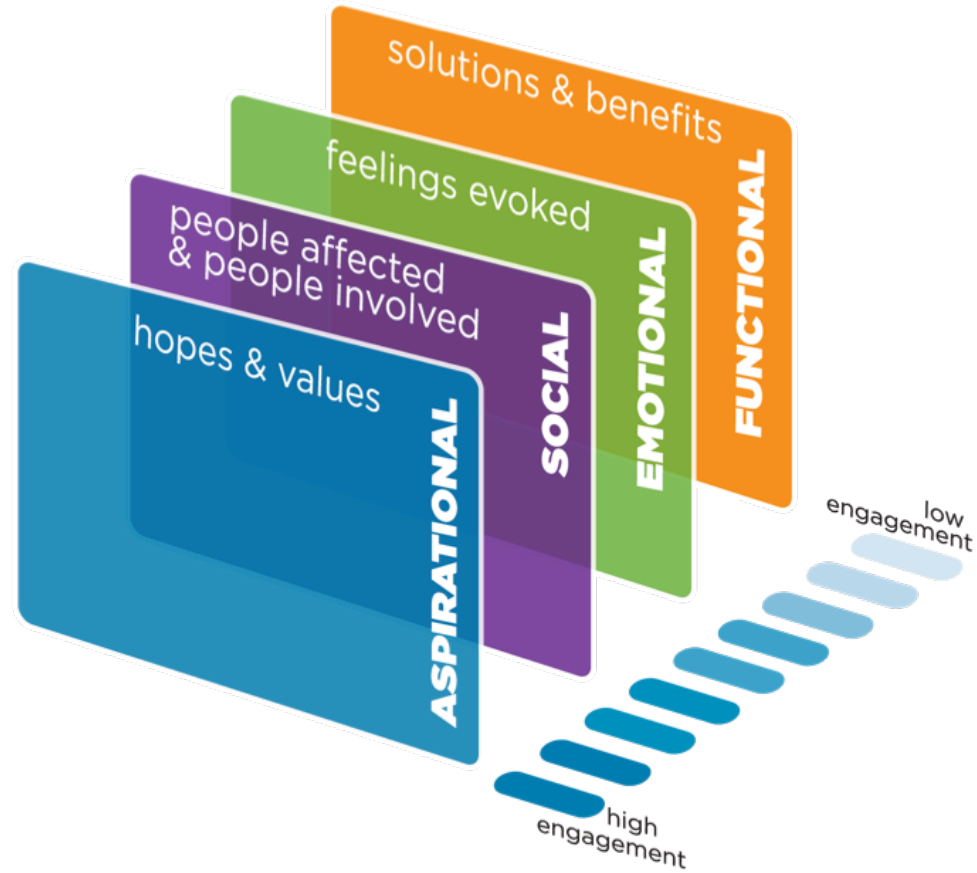
Current State:
Not sure how to approach DEI in my foundation

Desired State:
Have the tools, resources & support to make change

Strategic Action Item:
Be a clearinghouse of resources; connect the persuadables to successful peers.

A Message to Inspire Action

Aspirational Communications Model





One-Minute Message

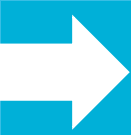
Philanthropists seek to promote the **common good**. Advancing diversity, equity, and inclusion in our organizations and grantmaking helps us live up to our values and achieve **greater impact**.

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.



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?

Equipping Champions for Action



Role of a Take 5 Champion

Commit to becoming a champion and taking 5 actions

Report what you plan to do to D5

Act

Ask D5 if you need help

Tell us about your successes and challenges

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/>

Resources: Communications & Outreach

Booklet on Moving the Conversation Forward



Resources: Communications & Outreach

Take5 Action Card

Those of us in philanthropy have dedicated ourselves to promoting the common good. Advancing diversity, equity, and inclusion in our organizations and grantmaking helps us live up to our values and achieve greater impact.



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Take a moment to think about what you can do to advance diversity, equity, and inclusion—and let us know! Fill out your information and send this postcard back to D5 so that we can track progress throughout the field. Your information will remain confidential.

FOR MORE INFORMATION, VISIT
WWW.D5COALITION.ORG

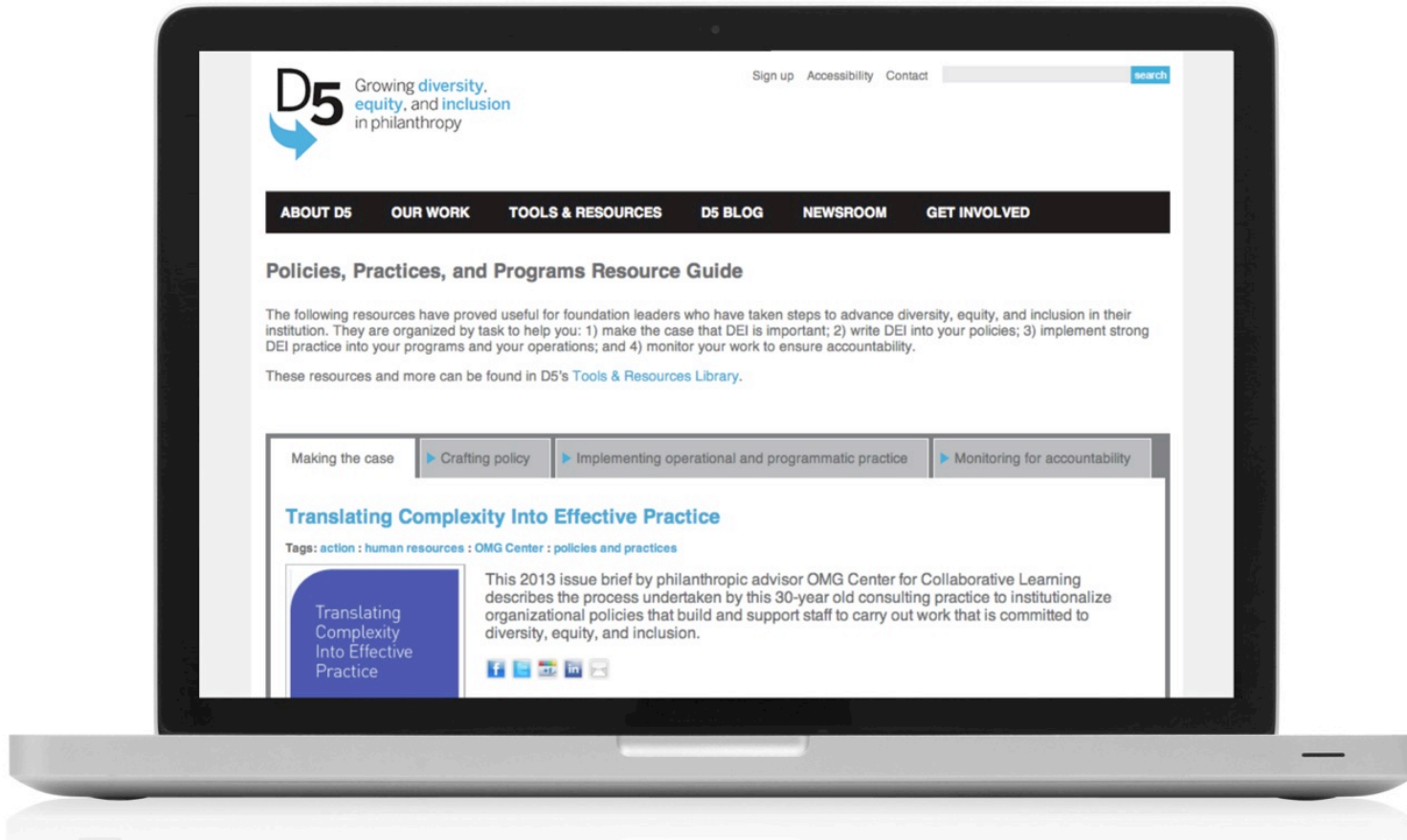
NAME

TITLE

ORGANIZATION

EMAIL

Resources: Policies, Practices & Programs Scan





- Connections
- Best policies & practices
- Capacity building
- Tracking progress

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

TAKE₅

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