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
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?

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

best practices

message

support

champion

TAKE 5

action
Questions?
Audiences & Objectives
Research helped identify key audiences...

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

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**ATTITUDES**

**Current State:**
Care about diversity & inclusion

**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.

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**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.

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**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.

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**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).
A Message to Inspire Action
Aspirational Communications Model
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
- Advancing
- Greater impact
- Constituencies
- Perspectives
- Growing movement
- New voices
- Effective
- Opportunities

- Universal value
- Suggests progress
- Better advance the mission
- Relevant to all foundations
- Expansive, suggests effectiveness
- Part of something larger
- Stay ahead of the curve
- Ties to mission, not good nature
- 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/](http://www.d5coalition.org/take-5-tools/)
Resources: Communications & Outreach

Booklet on Moving the Conversation Forward
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.

**Take5 Action Card**

- 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.
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- 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.

*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 share progress throughout the field. Your information will remain confidential.*

For more information, visit [www.d5coalition.org](http://www.d5coalition.org)
Resources: Policies, Practices & Programs Scan
Resources: D5 Support

D5

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!