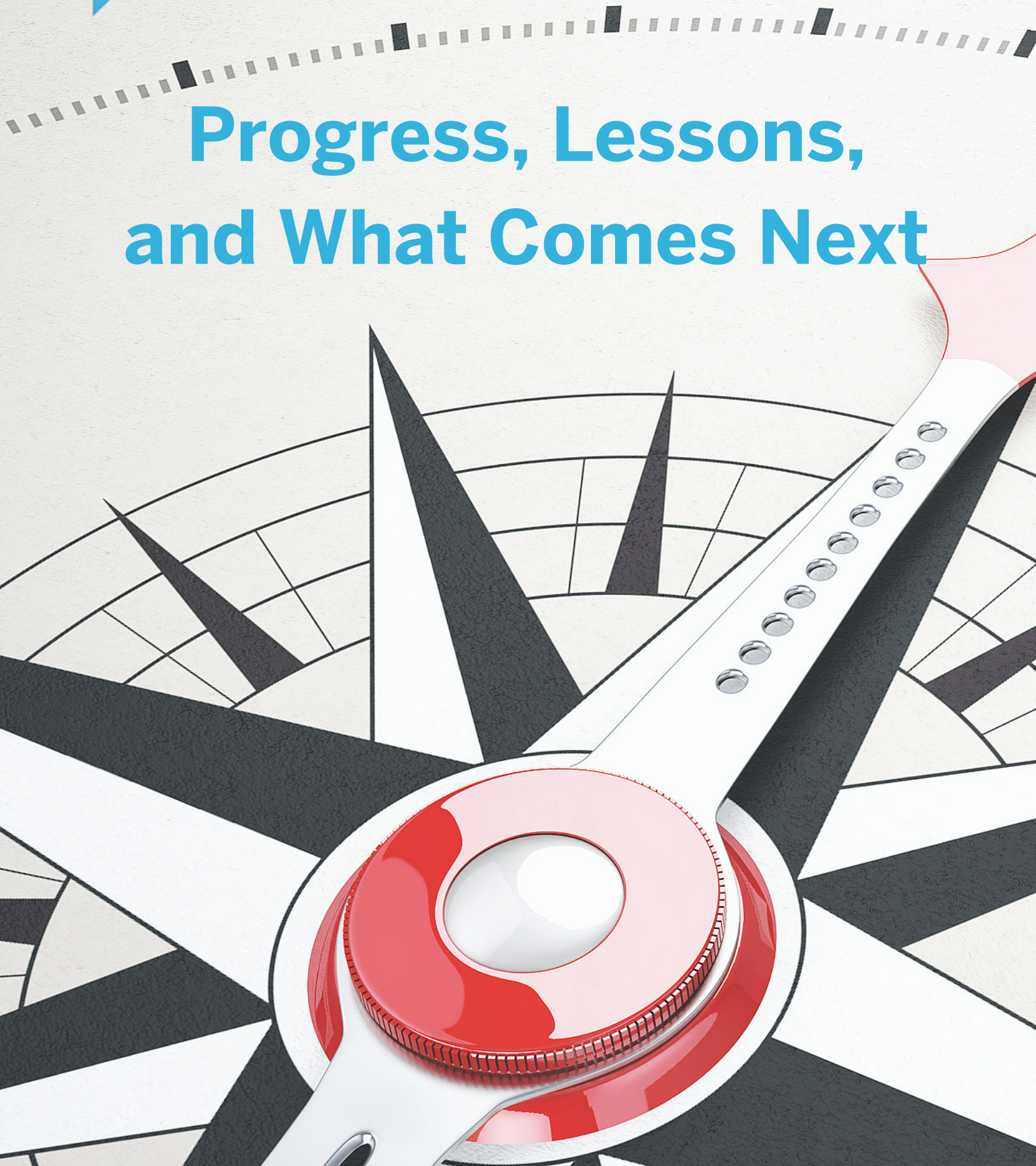




Advancing **diversity**,  
**equity**, and **inclusion**  
in philanthropy

# Progress, Lessons, and What Comes Next





# What We Learned

Over the five years of the D5 Coalition’s tenure, we learned many lessons about how to deepen philanthropy’s commitment to the values of diversity, equity, and inclusion, and how to support foundations’ efforts by practically applying those values. As D5’s tenure draws to an end, and to coincide with our annual presence at the Council on Foundations, we’ve extracted preliminary lessons from our learning partner to share with the field even as a more formal evaluation and assessment is underway.

## LESSONS ON D5'S ROLE AND PROCESS

### What worked

- D5 played a unique role as a neutral, focused “authoritative” party, seen as legitimate to a broad cross-section of philanthropy
- Kept emphasis on broad concepts of DEI; “bridger/connector” role leveraged the work of key partners for deeper substance and expertise
- Developed and executed on an inclusive, aspirational message based on research and a strategic focus on target audiences
- Five-year goal added sense of urgency

### What didn't work

- Initial structure was constraining; needed more flexibility to capitalize on momentum where it surfaced and to engage other key allies
- More time and role clarity was needed at the outset to develop effective collaborative engagement of key partners
- Take Five Campaign to spur action slow to take off; need more segmented and focused call to action
- Five-year goal was too short a timeframe for the size of the agenda

## D5 EVALUATION AND LEARNING

- One-on-one conversations, conferences and meetings, along with word of mouth, are the most effective entry points (rather than social media and broadcast messages) for engagement in DEI work.
- Many found D5’s field-level, inclusive, bridging position across affinity groups and interests beneficial.
- Those new to the work were interested in support for case-making, assessment tools, and peer learning.
- D5 is a valued source of DEI data, resources and research, which foundations and organizations used to back up their case.
- Diversifying trustees and staff is cited as the greatest challenge.
- Many organizations see a continued need for a field-wide, bridging entity to drive the work.



Diverse leaders



Voluntary action



More funding



Better data

# Lessons about Diversity, Equity, and Inclusion in Philanthropy

**D5 started with four goals – here is some of what we did and learned:**



**Goal : New foundation CEO, staff, and trustee appointments more closely reflect U.S. demographic trends**

- CEO engagement takes high touch outreach and messaging, and is effective at surfacing new and unanticipated leaders taking on the work
- Peer cohort groups are effective for supporting individual and collective action
- Interest in “pipeline” issues is high, particularly as it relates to staff diversity
- Trustees need targeted strategies for engagement that are unique from traditional philanthropic programmatic approaches



**Goal: More foundations take meaningful action to address DEI issues in their organizations**

- Reporting on the State of the Work and contributing new research on DEI to the field spurs internal engagement, conversations, and action
- Regional cohorts reflect the power of peer support and accountability
- More arenas are taking action – family foundations, issue-based cohorts, philanthropy support organizations – in ways that are tailored to those specific arenas
- Individuals and organizations in philanthropy need more intensive guidance on DEI practice and building organizational cultures that support DEI



**Goal: Annual funding for diverse communities increases substantially**

- The role of population-focused funds is changing within the larger field of philanthropy, presenting both opportunities and challenges as a vehicle for increasing funding to diverse communities
- Changing the narrative of who is philanthropic is necessary and happens through proactive communications and storytelling
- Without better data, assessing the change in actual dollars going to diverse communities is impossible



**Goal: Philanthropy has the research capacity to be more transparent about progress on DEI**

- Developing one field-wide system or solution to demographic data collection is not only impossible, it is not necessary; demographic data collection and use is being strengthened by an array of platforms, tools, and organizations using common approaches and taxonomies
- Existing and new platforms are integrating demographic data collection and use, and increasing the number and range of organizations sharing and using demographic data
- Making the case and addressing legal and privacy issues are as important as getting the taxonomies and questions right
- Continuing the expansion of partners and networks that are engaged in demographic data – and connected to each other – is paramount for future efforts



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# What's Next

A full evaluation is underway to round out these preliminary learnings, and to identify what is still needed to carry the work forward. This will constitute D5's final evaluation and highlight the implications for what comes next. We hope to engage you in the conversation about how to further this work beyond D5, and how to continue advancing diversity, equity, and inclusion in philanthropy. As the D5 Coalition, in its current form, sunsets, an ever-growing cadre of foundation leaders, philanthropic support organizations, and allies in other sectors are paying more attention to these issues and taking them up. And the larger world in which we operate increasingly reflects the need for philanthropy to be better equipped to operate in a diverse, complex, and changing context.

## RECOMMENDATIONS

### For areas of continued work

- Look beyond traditional philanthropic programmatic strategies to engage foundation trustees
- Assess and deploy mechanisms for connecting foundations to talent and resources that translate to actual practice
- Build capacity to assess organizational culture – the “readiness” for diversity and inclusion – and its relationship to talent pipeline issues
- Continue to advocate for the use of demographic data and for strengthening platforms that allow foundations to understand not only institutional impact but field-level impact
- Consider establishing standards for good practice with respect to diversity, equity, and inclusion so foundations can track and understand progress

### For how to do the work

- Establish a sustainable mechanism to keep up the drumbeat and support the field as a whole to be accountable to these issues
- Facilitate the leveraging and sharing of learnings and resources across organizational and siloed boundaries
- Produce concrete examples that showcase “effectiveness” to substantiate the impact imperative
- Allow for organic collaboration and deploy work with sensitivity to the range of organizational forms, the natural institutional tensions and the inevitable changes and transitions within the infrastructure
- Ground strategies in an analysis of the nuanced mechanisms and networks of influence in philanthropy, particularly at the regional level and using a cohort based approach
- Better integrate the perspectives and capacities of nonprofit organizations



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