

D5

Communications Training:

Empowering people in philanthropy to take action on DEI



Background on 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, AriGoio Communications

Carly Hare, Native Americans in Philanthropy

Mae Hong, Rockefeller Philanthropy Advisors

Michael Litz, Forum of Regional Associations of Grantmakers

Lawrence McGill, Foundation Center

Ericka Plater-Turner, Council on Foundations

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

Sylvia Zaldivar, Maestro Cares Foundation

And Growing...

Resources for Implementing DEI

ANALYSIS OF POLICIES, PRACTICES, AND PROGRAMS
FOR ADVANCING DIVERSITY, EQUITY, AND INCLUSION

Full Report



Models for change

Analysis of activity and resources

On-ramps to get started

What animates DEI work:

- Mobilizers
- Missions
- Money
- Moments
- Movements

Advancing DEI: Audiences & Objectives



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)

Audiences

Champions:

Fatigued Fighters

Emerging Champions:

Recent Enthusiasts

Persuadables:

Heartfelt Pragmatists

Skeptics 1:

Pro-Diversity Regulators

Skeptics 2:

Rugged Individualists

→ Road Map to Impact



**Be Aware
of the Need**

AWARENESS



**Care About
the Cause**



**Understand
the Problem**

ATTITUDES



**Feel a Sense
of Urgency**

ACTION



**Know How
to Help**

Champions: Fatigued Fighters



Define Equity Differently

Establish common definition and train the field.

Common Language on Equity



Care



Care



Field is Stuck

Show field is doing something new.

New Hope



Willing to Help



Willing to Help




Unsure How to Help

Engage in Take5.

Act or Encourage Others to Act


Emerging Champions: Recent Enthusiasts




Unaware of DEI Efforts

Highlight progress & potential of current efforts.


DEI Movement is Cutting Edge




Care




Care




Understand Problem




Understand Problem



Willing to Help



Willing to Help



Unsure What to Do

Direct to resources and offer peer guidance.

Have Tools & Support to Make Change

Persuadables: Heartfelt Pragmatists



**Aware of D&I,
Not Equity**

Define equity consistently in all communications.

Understand Equity



Care



Care



**Don't See Relevance
of DEI to Mission**

Prove effectiveness case with research and stories.

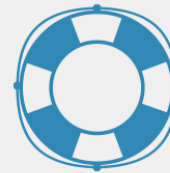
**Understand
Relevance to Their
Foundation**



Don't See Urgency

Highlight surprising information about changing constituencies.

**Recognize Change,
Feel Peer Pressure**



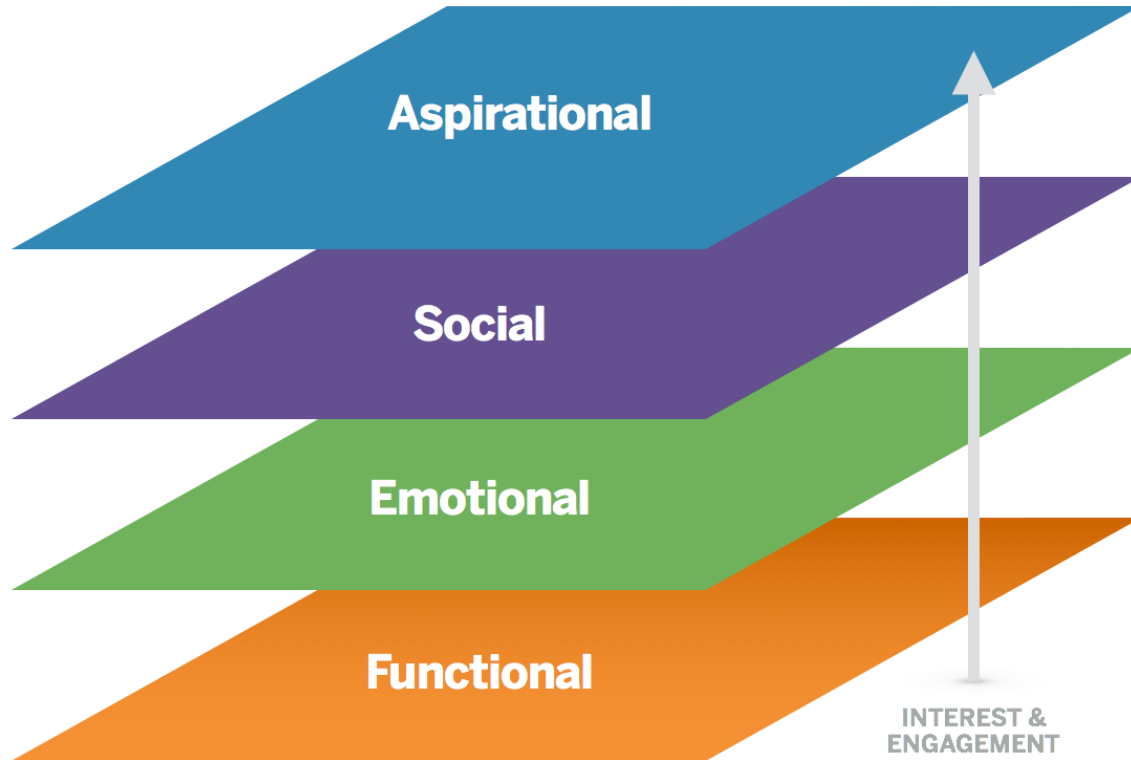
**Not Sure How to
Approach DEI**

Connect to resources and seasoned peers.

**Have Tools & Support
to Make Change**

A Message to Inspire Action

Approach: Aspirational Communications Model



Values

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.

Speaks to a universal value that can connect to all foundations

“Grantmaking” includes equity concept in a tangible way

The Challenge

Our constituencies, from the communities we serve to our partners in business and government, are becoming increasingly diverse. We need to understand and reflect this rich variety of perspectives in order to achieve greater impact.

Advancing diversity, equity and inclusion is hard, but leaders in philanthropy have a track record of tackling many of our country's toughest challenges—and we again have an opportunity to lead the way.

Uses “our constituencies” to make diversity relevant to all foundations

Connects diversity—often seen as a tired issue—to current context

Acknowledges that it’s a difficult issue but that philanthropy is capable of rising to the challenge

The People

To meet this challenge, philanthropic, community and thought leaders are all coming together in an ambitious effort. We are a growing collaboration of foundations large and small, individual donors, regional and national associations, and organizations that focus on diverse communities.

Together, we are a powerful, national network with the potential to impact philanthropy at every level.

Showcases the variety of those involved so everyone can see themselves as part of the effort

Highlights the synergy of this powerful combination

The Solution

We are part of a growing movement in philanthropy to ensure that those who have been historically excluded—women, people of color, people with disabilities, and the LGBT community—are at the decision-making table and reflected in our portfolios. We are working to:

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

Succinctly packages goals for advancing DEI

The Benefits

By bringing new voices and expertise to the table, we have the potential to make our foundations more effective at advancing the common good. Diversity and inclusion can help our foundations better identify creative solutions to our internal challenges, and those faced by the communities we serve. And thinking about equity in our grantmaking can help us create opportunities for all communities.

Shows the tangible benefits of “new voices and expertise,” which audiences found motivating

Uses the word “effective” because it tests well—and is modified by “potential” to avoid overpromising

Defines “equity” in terms of opportunity, which is more readily understood and supported



Call to Action

How can greater diversity, equity, and inclusion in your foundation and funding portfolio enhance your impact? Commit to an action plan for your foundation's hiring, grantmaking, or data collection.

Go to D5coalition.org for ideas and inspiration.

Acknowledges that foundations are in different places and different aspects are more relevant to them than others

Provides a simple call to action—which can be tailored to the specific situation



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



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.

*Visit <http://www.d5coalition.org/communication-tools/> to access the full Message Manual – and many more communications resources.

Questions?

Story Templates



Lessons Learned Story

What goal were you trying to achieve?

How did DEI relate to that goal? Did you miss making the connection?

When did you realize you had made a mistake?

How did you respond?

What lesson did you learn that affects your work today?

Impact Story

Describe the foundation who chose to advance DEI: What is their mission?

What aspect of DEI did they focus on – and why?

How did they do it?

How did it impact grantees?

How did it help them better achieve their mission?



Exercise

Practice using the message to tackle a scenario.

Mobilizing Champions for Action

TAKE5

A movement to take action

500
actions



100 champions
commit to Take 5

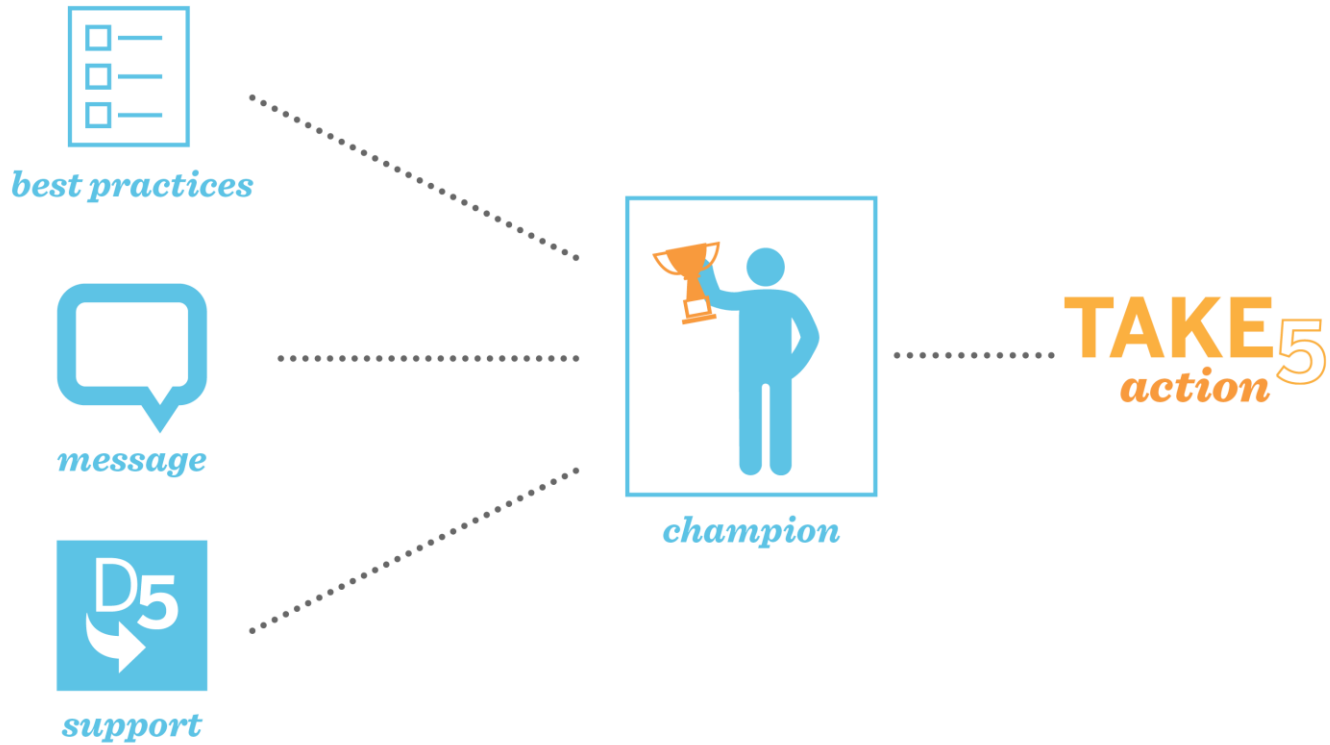


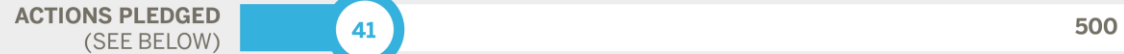
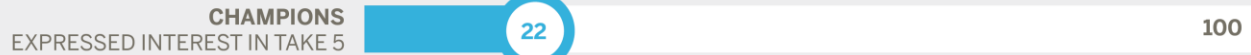
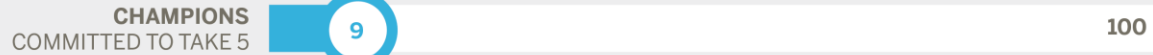
Each champion
takes 5 actions to
advance DEI



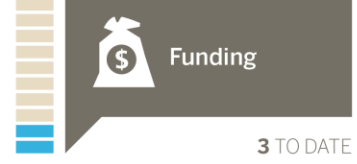
D5 plays the role
of helpful guide

Take 5: Encouraging & Supporting Action





ACTIONS PLEDGED



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/>

Questions?

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

TAKE₅

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