



+ **Diversity, Equity and Inclusion:** Best Practices in Donor Engagement Events

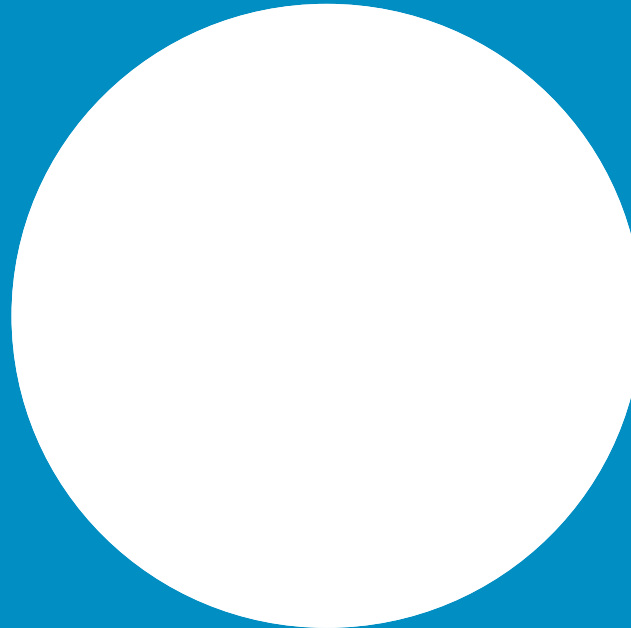
Embracing the values of diversity, equity, and inclusion starts with you!
Learn a framework to help you incorporate these values into your
everyday fundraising activities and donor engagement strategies.





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Agenda

- *Clear the slate and level set*
- *Define diversity, equity and inclusion in philanthropy*
- *Identify best practices*
- Share tangible examples

Learning **Objectives**

- To define diversity, equity and inclusion in relation to your fundraising practices
- To identify how you can better incorporate diversity, equity and inclusion best practices into your own role and responsibilities
- To be able to influence your peers to incorporate diversity, equity and inclusion best practices

Clear the Slate

“DEI” is not a word

Adaptive leadership starts with you

A rustic dining table set for four people. The table is made of light-colored wood and is surrounded by white chairs. The table is set with white plates, woven placemats, silverware, and glasses. In the center, there is a centerpiece of dried grasses and two lit candles. The overall aesthetic is warm and natural.

**Have you prepared your
“table”?**

How does this relate to fundraising practices?

- Avoid “engaging” supporters with a “one-size fits all” approach. Consider an equity lens.
- Acknowledge that supporters have different experiences, understandings and stories as it relates to your work and impact. Consider a diversity lens.
- Recognize opportunities for partnership, the importance of being “seen” and the value of time, talent, testimony and treasure. Consider an inclusion lens.



Defining Diversity

Diversity is the ability for differences to coexist together, with mutual understanding, respect or acceptance present. It includes a range of people's racial, ethnic, socioeconomic, and cultural backgrounds and various lifestyles, experiences, thoughts and interests.

Diversity in philanthropy includes the practice of:

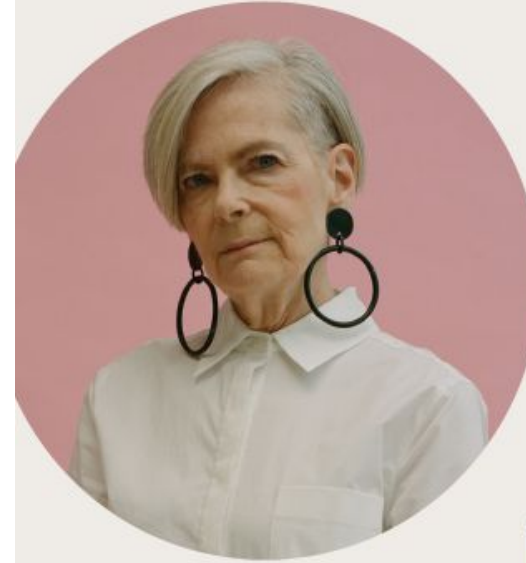
- Using a full range of perspectives, ideas, values, multicultural competencies and knowledge in developing strategies, creating content, cultivating experiences, and decision-making,
- Creating opportunities and space to use various communication vehicles and platforms to connect with constituents, ask for money and receive feedback,
- Valuing all the ways in which people differ, including the different characteristics that make one individual or group different from another; and
- Acknowledging populations that have been—and remain— underrepresented in fundraising and have historically been excluded in the broader society.

Examples: Diversity in Special Events

Your Values Are
In Your Budget

Know Who Is In
The Room
“Just Ask”

Multi-channel
Invitations &
Thank you’s



 | PRESIDENT'S
CIRCLE



Your Values Are
In Your Budget

Budgets are moral documents and show our priorities!



- Ensure that we are being just as generous and competitive in our pricing when it comes to women and minority owned businesses, speakers, etc as we would be otherwise.
- Be thoughtful in compensating said companies or individuals comparable to what you would/have those from majority groups.
- Spread the word! Encourage your broader institution to do this as general best practice, including clear examples, when possible.

Know Who Is In
The Room

“Just Ask”

Event Registration

Explanation of why we are collecting self-reported demographics

In order to hold our organization accountable to reaching a diverse community of advocates, we ask our supporters to share how they self-identify their race, ethnicity, gender identity and sexual orientation. In addition to holding ourselves accountable, this information may be used to invite you to spaces or events dedicated to people of a shared identity. This information is optional to provide.

*We acknowledge and honor the cultural and racial diversity within Hispanic and Latino/a/x communities. For the purposes stated above, PPGNY defines Hispanic or Latino/a/x as any persons of Cuban, Mexican, Puerto Rican, Dominican, South or Central American culture or origin, regardless of race.

**We are committed to creating gender inclusive spaces and affirming diversity around gender identity/expression and sexual orientation. Please check out this link [here](#) to learn more about gender identity/expression and sexual orientation.

SUBMIT

Planned Parenthood | PRESIDENT'S CIRCLE

LOOKING TO THE FUTURE

Cocktails and conversations about the future of Planned Parenthood and care delivery

An exclusive *President's Circle* event
Planned Parenthood Federation of America
Planned Parenthood of New York City, Inc.

Multi-channel Invitations & Thank you's

- Create an integrated strategy
- Use different platforms to communicate and engage
- Email, Phone, Text Message, DM's on Social, Peer to Peer, Ads
- Schedule reminder messages
- Be intentional in choosing your messenger

Who listens to voicemail anymore?





**Equity in
philanthropy
includes the
practice of:**

- striving to identify and eliminate barriers that have prevented the full participation of donor constituents and prospect groups **because of racism.**
- increasing equity within the procedures and processes of organizational systems and the distribution of resources as it relates to fundraising, staff training, strategic planning, and budget creation.
- discerning how you cultivate and steward donors and using research and culturally sensitive messaging to improve how we “engage”, specifically, doing away with a one-size fits all approach.

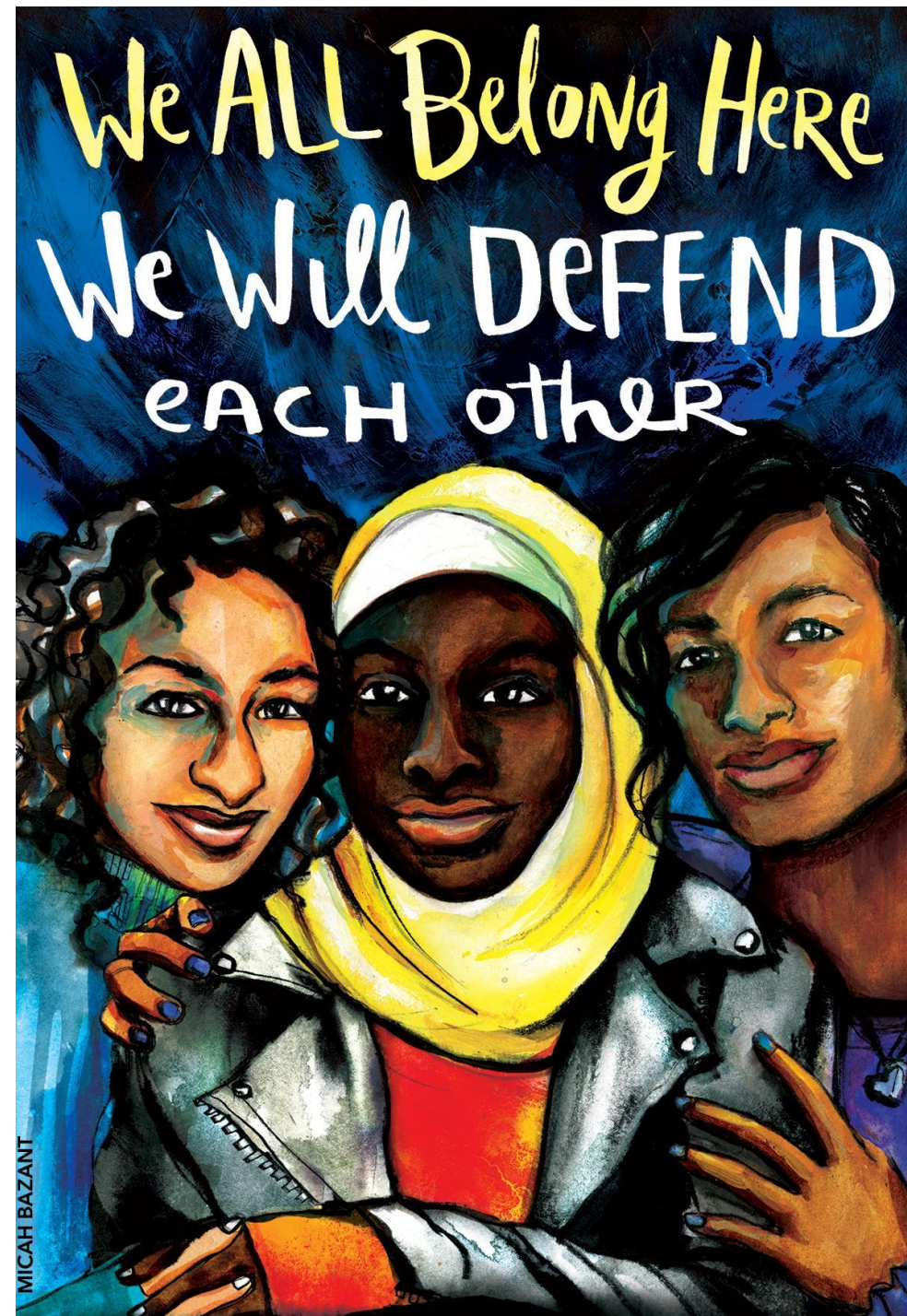
When equity exists, our donors and prospects have equal access to opportunities and experiences that connect them fully to our mission.

Examples: Equity in Special Events

Preparing
Proactively

Thoughtful
Programming &
Signage

Continue the
Conversation
Post-event



Preparing proactively

How are you setting the table for your donors to feel comfortable before they arrive?



- Provide event overview
- Donor Questions
- Can they bring a guest?

Thoughtful Programming & Signage



Ask yourself:

- What are the needs and goals for the event?
- What are you trying to convey?
- Who will be in the room?
- How can you be thoughtful about who is present—what are their needs and expectations? where can they afford to be pushed? how can you make this experience most meaningful and impactful long term?

Continue the Conversation Post-event

Everyone processes information differently.

- Request Feedback / Post event surveys
*** Share what you will use feedback for*
- Email re-caps with take-a-ways and calls to action
- Video recordings with subtitles
- Post-event debrief meetings with internal teams



Defining Inclusion

Inclusion refers to the degree in which we are able to create environments, so everyone is welcomed, respected, supported and valued and individuals with diverse perspectives and backgrounds feel and are able to participate fully in those spaces - especially in the decision making process.

Inclusion in philanthropy includes the practice of:

- seeking individuals from diverse backgrounds and identities as active participants in the planning, design, decisioning, implementation and evaluation of fundraising activities.
- creating space and opportunity for the diversity of our donor file to be seen, heard and considered in our strategic planning and activities.
- asking for an invitation to participate in “other peoples’ spaces”. Be willing to show up to other diverse and inclusive spaces.

Inclusion in special events includes the practice of:



Perhaps more tangible, it considers:

- What development staff are being asked to participate in certain activities?
- How are development staff members being asked to participate?
- How do we select and invite donors/constituents to be part of our special events?
- How do we speak and tell stories so that our donors/constituents see themselves and their lived experiences or aspirations?

Examples: Inclusion in Special Events

Let's "MOCHA" It

by: The Management Center

"The Devil" is in
the Details



Let's "MOCHA" It

by: The Management Center

- **MANAGER:** Assigns responsibility and holds owner accountable.
- **OWNER:** Has overall responsibility for the success or failure of the project.
- **CONSULTED:** Should be asked for input or needs to be bought in to the project.
- **HELPER:** Assists with or does some of the work.
- **APPROVER:** Signs off on decisions before they're final.
- **RACIAL EQUITY ANALYSIS:** Assess impact by race or any other demographic.

Collaboration starts with you!



“The Devil” is in
the Details

Practicing Inclusion in Special Events



Venue Selection

Nametags

Start Your Action Plan

Adopt the
Definitions

Learn and comprehend the D/E/I definitions *in a way* that makes you comfortable and confident to share and introduce them to others.

Brainstorm

Think about how you can apply a D/E/I lens to your actual job responsibilities and your overall event program. Adaptive leadership starts with you.

Identify the
“Why”

As you identify recommendations or opportunities to apply a D/E/I lens, distinguish the “Why” for your effort and your expected outcomes.

Practice

Say in conversation: I am practicing equity by eliminating this barrier for XYZ...Let’s practice inclusion by asking ABC... We can practice diversity by offering LMNOP...

MOCHA(R)

create an implementation plan for each D/E/I opportunity and create a MOCHA(R) so all team members understand their role/responsibilities in practicing D/E/I in fundraising.

Takeaways

- Leading with a diversity, equity and inclusion lens will help you and your teams more authentically and intuitively practice - embrace culture change.
- Everyone on your team should understand and be accountable to how they can incorporate diversity, equity and inclusion into their roles and responsibilities.
- Adaptive leadership is required. You may to be interrupt what you've been doing... We are asking of our teams and systems to change priorities, beliefs, and habits.

Thank you!

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