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Diversity, Equity and Inclusion: Best Practices in Fundraising

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 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

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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

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Clear the Slate

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“DEI” is not a word

This is *not* a conversation about diversifying your donor base

Adaptive leadership starts with you

This is a conversation about “preparing your table”

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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.



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Diversity in philanthropy includes the practice of:

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.

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- 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.

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Examples: Diversity in Fundraising

Let's "MOCHA" It

by: The Management Center

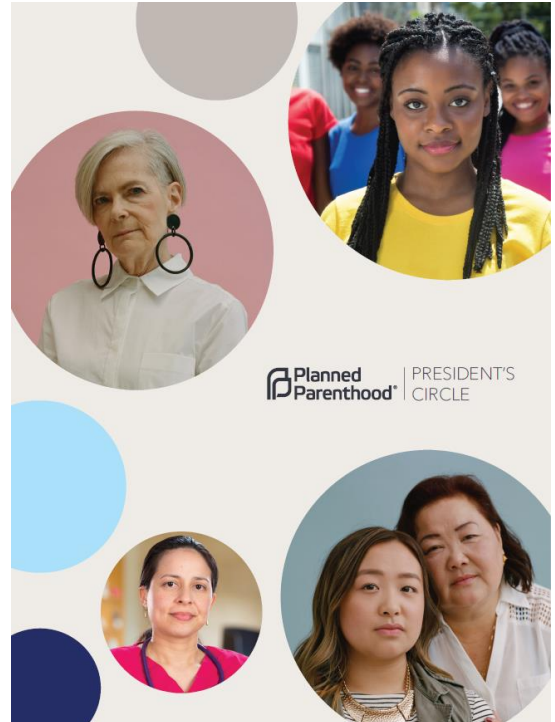
5 Donor Love
Languages

by: Tammy Zonker

Revamp Donor
Focus Groups

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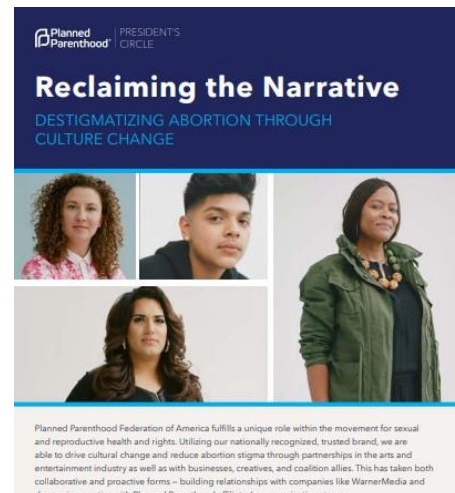
Let's "MOCHA" It

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.

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Practicing Diversity in Fundraising



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5 Donor Love Languages

by: Tammy Zonker

- Hands of Service
- Words of Affirmation
- Tokens of Appreciation
- Quality time
- Proof of impact

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Practicing Diversity in Fundraising



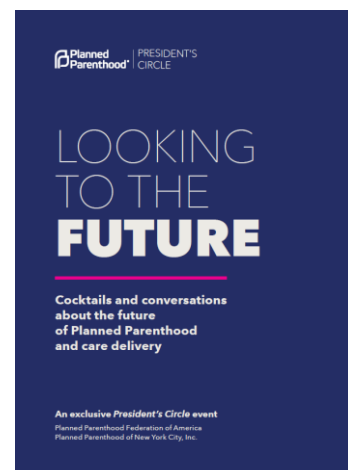
Revamp Donor Focus Groups

- Virtual offerings
- Extended group timeslots: AM, Midday, and PM
- Host committee for personal outreach
- Text, email and phone recruitment
- Targeted underrepresented voices

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Practicing Diversity in Fundraising



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.

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Examples: Equity in Fundraising

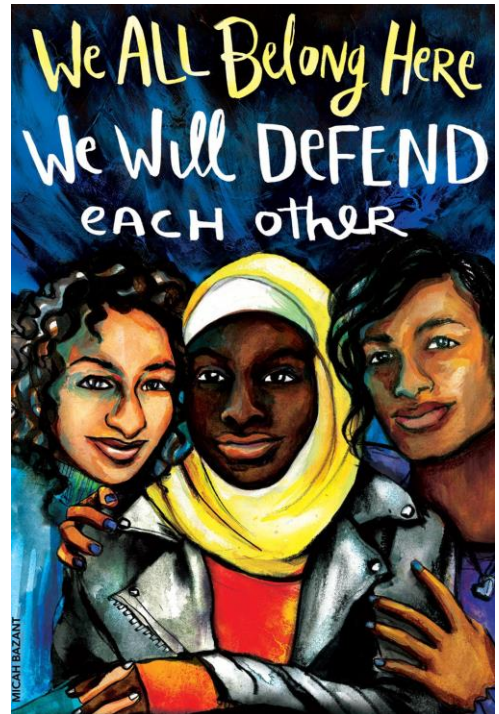
Connect the dots

Put the “R” in the MOCHA

Name systemic oppressions

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Practicing Equity in Fundraising

Connect the dots and bring your donors along

Your work and the organizational mission does not exist in a vacuum. There is a narrative ecosystem, created by media and culture. Are you connecting the dots for your donors? Do they know why it's so important to support your cause?

- Media Recaps
- Donor Questions



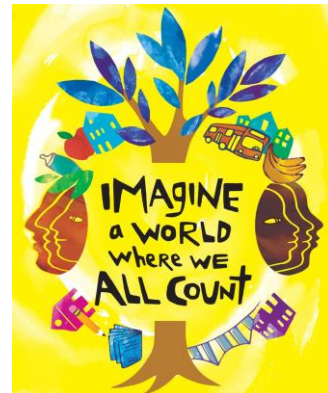
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Practicing Equity in Fundraising

Put the "R" in the MOCHA or whatever project management process you drive

What's the "R"? It's the racial equity lens. And it's just as critical as the manager, owner, consultant, helper, and approver in your process.



- Practice collaboration with other organizations in your issue area.
- Do you send out observance communications, for instance, Black History Month, Latinx History Month?

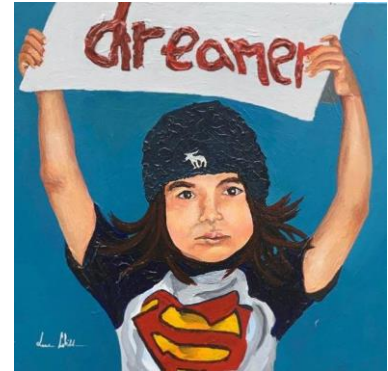
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Practicing Equity in Fundraising

Name systemic oppressions

Option 1: At Planned Parenthood, we know that communities of color face more hurdles than others in accessing quality health care.



Option 2: At Planned Parenthood, we know that communities of color face more hurdles than others in accessing quality health care — due to historic and present-day intersections of racism, classism, immigration status, transphobia, ableism, and other systemic barriers to health care.

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Inclusion in philanthropy includes the practice of:

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.

- 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.

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Inclusion in philanthropy includes the practice of:



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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 donors/constituents to be part of our research/surveys? And how are they invited to events?
- How do we speak and tell stories so that our donors/constituents see themselves and their lived experiences or aspirations?

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Examples: Inclusion in Fundraising

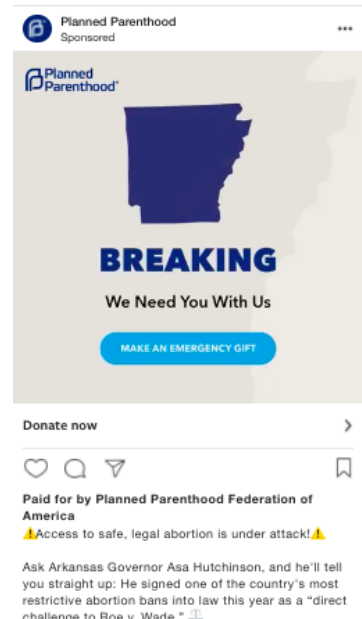
Deliberate
Storytelling &
Creative

New Platform
Exploration

Surveys &
Welcome
Series

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Deliberate Storytelling & Creative

Does the creative focus on real world change?

Who is affected and impacted?

Why are we asking people to act?

Can we communicate without exploiting or othering?

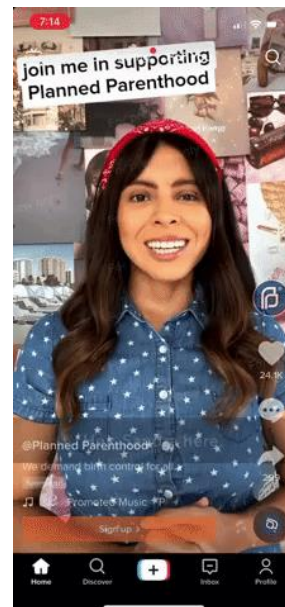
Whose need are we talking about?

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New Platform Exploration

- Meet audiences where they are
- Consider where new audiences over-index
- Evolve and expand



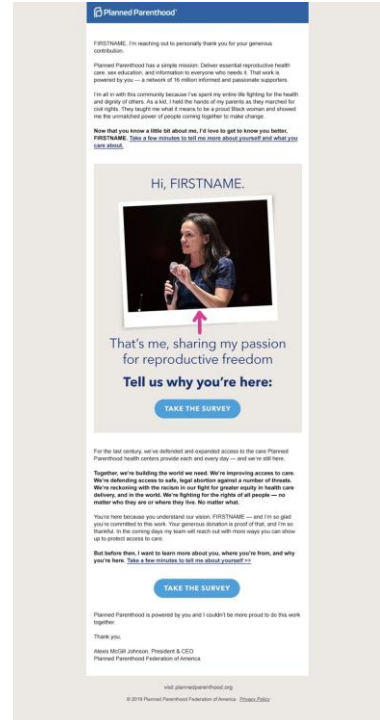
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Surveys & Onboarding

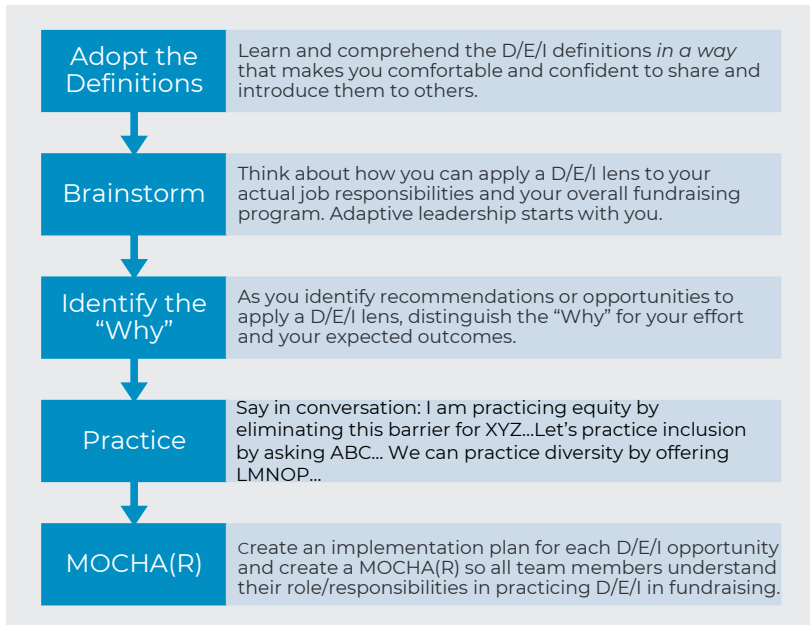
- Establish an onboarding experience
- Solicit input from your supporters
- Allow your audience to identify

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Start Your Action Plan



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Takeaway S

- 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. We are asking of our teams and systems to change priorities, beliefs, habits, and loyalties.

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Thank you!

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