



Diversity In Fundraising Resources

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Presented By



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Thank you for participating in our presentation at the 2021 National Association of Economic Educators Conference. This e-book includes our remarks and a DEI at a Glance Survey you can use with your colleagues.

First let us say we salute your work, your advocacy, and your profession. Promoting economics, personal finance, and entrepreneurial education in the classroom impacts the next generation. We each were impacted by this type of education during our early – and continuing – education, and it has shaped who we are today in very positive ways.

Your work has become even more important as we – as a nation – embark on a path towards increased equity: Economics, personal finance, and entrepreneurship are important individual and collective components of an equitable society.

This path towards increased equity is an opportunity for all of us to grow beyond who we are, and into who we want to be. It is also a time of challenges as we look around at what we have built and notice our limitations. Intentionally or unintentionally, many of us have built meaningful organizations that impact so many in positive ways. And yet when we look at who we are and who is supporting our work we can find a lack of diversity. That lack of diversity can reflect inequity; it can create inequity; it can blind us to what we cannot see.



A Public Secret

We'll start with a public secret: diversity – or a lack of diversity – in fundraising is often tied to the extent to which an organization is diverse. By organization, we mean: Who is providing leadership at the board, staff, and advisory levels? Who is funding your organization? Who are you serving? As it relates to the National Association of Economic Educators, diversity also relates to the extent to which economic education ties to the lived experiences of students. Who is teaching, who is learning, and what are the examples used to illustrate concepts?



Sometimes when organizations approach us on the topic of diversity and fundraising, they are looking for a “quick fix.” There is always no such thing. Depending on your organization – its history and its vision – there will be steps to take; some quickly, and others will take more time.

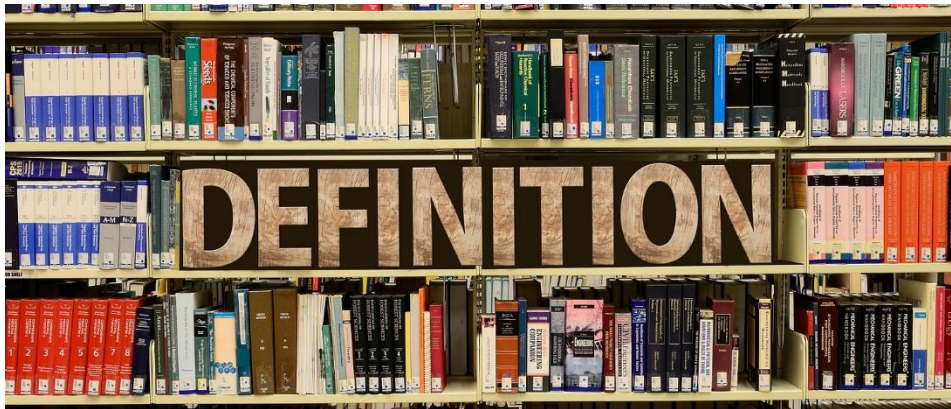
We don't have a magic wand or prescription you can use to increase diversity in your fundraising. But we can share questions, experience, and a process with you.

What Are We Talking About?

Before we fall into the trap of defining diversity as solely related to race and ethnicity, let us take a moment to define our terms. And before we do that, let us be really clear that more and more people are members of “blended” families. There are multiple races, ethnicities, abilities, experiences, and immigration statuses all living under one roof or gathering as an extended family for picnics or holidays. As we move from notions of “Black and white” we understand that none of us can tell who a person is “just by looking at them.” We have to get to know each other, our cultures, our shared points of reference, and ways in which we are different from each other.



Now onto definitions. The following is drawn from [The Power of a Shared Language for Advancing Racial Equity, developed by The Race Matters Institute of JustPartners, Inc.](#)



Diversity refers to the presence of different groups and/or different perspectives. Different people and perspectives are shown to produce better organizational results.

Inclusion is when voices are valued from the diverse people present and they have organizational power. Inclusion is a core feature of a respectful organizational culture; it is manifested in the setting itself and the dynamics of that setting. **A diverse setting without inclusion is not likely to remain diverse.**

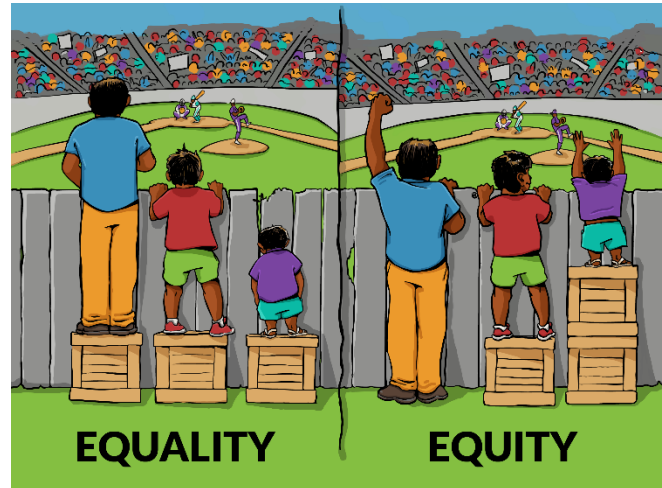
Equity is the outcome where all people can achieve a valued goal or circumstance. It is grounded in policies and practices that are informed by, and inclusive of, diverse people.

An equitable setting, by definition, will be inclusive and is more likely to be and remain diverse. A growing number of organizations pay attention to diversity, but far fewer pay attention to inclusion and equity. These do not substitute for one another. For example, **having diverse personnel is not the same as having equitable policies.**

Equality v. Equity

Most often “equality” is used to refer to inputs – people receive the same resource, with the expectation that the outcome will be the same. However, if people are situated differently when receiving the same resource, equal input will only reinforce existing inequalities.

On the other hand, “equity” refers to outcomes: all people can achieve a valued goal or circumstance through the application of differential resources because groups are not situated similarly at the outset. Racial equity is measurable, as seen when disparities are declining, or gaps are closing across racial groups on a given indicator of well-being.



[Interaction Institute for Social Change](#) | Artist: [Angus Maguire](#).

For an example provided by [Brothers Academy](#)--in an equal classroom, students will more or less be treated all the same. They will have the same supplies, same assignments, same amount of interaction with the teacher, and learn the same way. As you can see, this isn't a bad standard to strive for, but it falls short in many ways.

Equity, on the other hand, strives to achieve the best possible outcome for each individual student. Equity isn't the easy route; instead of giving every kid equal treatment, you now need to look at each student as an individual and adjust your treatment of them accordingly.

Why Diversity Matters in Philanthropy

In terms of philanthropy and fundraising, there is a perception that only one segment of our community is in a position to give money and set policy. The truth is that people of color continue to position themselves as donors because of our increased education, wealth, and changes in the dominant culture.

When it comes to fundraising, we have to think about the different cultures that comprise our community: how they think, what they value. We need to get to know their leadership, and to understand what is important to them. We need to build platforms that allow us to hear voices different from our own and to engage those voices in our work...even when that means our work might change by including “someone else’s” priorities.



It Starts at the Top

A commitment to inclusion, diversity, equity, and access starts with an organization’s vision and is made manifest through policies and practices. Our commitment is made manifest through who we hire, the projects we focus on, the collaborations we create, and how we develop our boards.

As leaders, we need to check our “tolerance for intolerance.” We need to examine our implicit and explicit biases. We need to examine and modify our policies and practices. It is time for us to increase the ways in which we hold each other accountable — within our organizations and within our sector. There are no easy answers — there is only a way forward that is together.

Inclusive fundraising invites more people to the table. Inclusive practices encourage us to ask who is missing, and to take action to invite others in. And it means we follow up on our invitations with actions that encourage new members to share their highest talents, their relationships, their experiences, and priorities.



Where Do We Go from Here? ... Into Action

Here are six specific actions that you can consider as you move forward.

1. When seeking to increase diversity, **look at the composition of the organization as a whole, not just the fundraising team.** Take time to consciously build a qualified and diverse team. Think about your expectations. Do you want someone to be the “gay employee”? Or do you want an accountant who brings his top game to work on a daily basis? Think about the match — or mismatch — between who you hire and who you serve. For many, their “team” includes a small core group of staff that is complemented by contractors, consultants, bookkeepers, accountants and tax preparers, editors, curriculum designers, attorneys, vendors, and volunteers. When looking at the composition of your organization “widen the lens.” When you engage people, look at how they contribute to the diversity within the whole of your organization.
2. **Build pipelines for advancement within your organization and within the schools you work with.** This can be in terms of curriculum development, and teacher development, as well as fundraising. Take time to think about who you engage and how increased diversity can impact your curriculum and how it is received. Keep in mind that building a diverse team strengthens the individuals who interact with each other. It builds skills and a shared experience. And it provides you with concrete examples of how you are addressing the needs of an increasingly diverse student population.

As it relates to fundraising, those who are vested in your organization can be invited to lend their experience and relationships to the work of securing the funds you need. Creating pipelines to leadership that include authority, decision-making, fundraising, and other forms of revenue generation can strengthen your organization and increase its relevance.

3. **Engage people from diverse backgrounds** to participate as board members, advisers, and fundraising volunteers. Bring new members onto the board in diverse cohorts and beware of creating a situation where one person becomes representative of a race, gender, or ethnicity. Create an onboarding process that shares information about the organization, its

priorities, fundraising, and finances so that all members have access to information, not just those who already know someone on the board. Create “board buddies” so that each new board member has someone who can help them navigate and understand the written and unwritten rules of the board.

4. **Review policies and practices** to learn what formal or informal barriers to employment may be in place. For example, are the educational requirements for specific positions a job-related requirement or a barrier? What about years as a “fundraising professional?” Could sales experience, volunteer fundraising, or entrepreneurial experience provide comparable skills? Does the time or location of meetings create barriers for fundraising volunteers?
5. **Engage our donors.** As we build the diversity within our staff and boards, we need to engage our donors as well. Share your vision for inclusion, diversity, equity and access with your donors, especially your major donors. Talk about why it is important and the steps you are taking. Encourage them to ask questions. Ask for their guidance, suggestions, and participation. Don’t let silence pass for acceptance. Create opportunities for long time donors to meet with and get to know your new donors. As you bring on new staff leadership make sure that your board schedules time for your major donors to meet your new leaders. As we increase the diversity of our organizations, we must retain the long-time support of donors who have invested in our organizations.
6. **Growing Resources.** As fundraisers we want to increase the diversity of our donors so that we increase support for the mission and vision of the organizations we represent. We want to build a spirit of inclusion, a valuing of diversity, and a welcoming spirit amongst all our donors. With opportunities to “truly know each other” across differences, donor circles, donor receptions, and nonprofit activities can be a unique space where one of the “benefits of giving” is the ability to participate within a diverse community of peers. We want to live our values in how we treat our donors, how we bring them together, and in how we create equity when offering opportunities and visibility.

Look at the Money

We have primarily focused on encouraging inclusion, diversity, equity, and access amongst our donors, staff, and leadership. Equally important, but often overlooked, is the economic impact of our decisions and how inclusion, diversity, equity, and access need to be included when we spend the money we raise. Who are our accountants, building contractors, endowment managers, event planners, real estate agents, and insurance representatives? Who provides graphic design services, janitorial services and supplies, technology equipment, services, training, and support? Who do we buy office supplies from? Who provides the food or snacks? Who do we bank with?



In closing, inclusion, diversity, equity, and access have to be at the heart of who we are — these are not an additional area to check in on. They are vital to our sustainability — and the sustainability of our region and country. ***These are human values.***

NAEE Individual Take Home Exercise Your DEI at a Glance

Yes	No	Not Yet	Not Sure	In Process	Our DEI at a Glance
					1. We value diversity, equity, and inclusion and seek to integrate these into all our work.
					2. We have defined our mission and goals for our diversity, equity, and inclusion program. <i>(if yes, insert below)</i>
					3. We have specific areas where we focus our DEI work. <i>(if yes, insert below)</i>
					4. We know our areas of strength. <i>(if yes, insert below)</i>
					5. We know where we have challenges. <i>(if yes, insert below)</i>
					6. We are working on solutions. <i>(if yes, insert below)</i>
					7. We have a timeline and action plan we use to guide our progress. <i>(if yes, attach these to this document)</i>

Yes	No	Not Yet	Not Sure	In Process	Our DEI at a Glance
					8. We know the qualitative and quantitative impact we want to achieve, and we have systems in place to measure this. <i>(if yes, attach these to this document)</i>
					9. We have agreed upon a person to manage this focus for our organization and have allocated so they can provide the management needed. <i>(if yes, please share the name and position of this person)</i>
					10. We have developed a team that focuses on this work and encourages us all.
					11. Incorporating diversity, equity, and inclusion into our economic education work has created a culture shift within our organization. <i>(if yes, please describe the culture shift)</i>
					12. We have the capacity, infrastructure, and people to integrate DEI into all our work. <i>(please describe what you have, or what you need)</i>
					13. We have secured buy-in from all parties across our organization – leadership, board, local educators, volunteers. <i>(please share names of those who support your DEI work)</i>

Notes and Comments:
