



## **Inclusive Philanthropy: Who gives, how, and with what impact?**

AFP ICON 2023 | New Orleans | April 16-18

### **HANDOUT: Principles and Checklist for Growing Diverse Philanthropy**

#### **6 Key Principles to Successful Diverse Philanthropy\***

##### **1. Strategy begins with insight.**

- Pausing to learn, while seemingly counter-intuitive, is essential to gain the awareness that effective strategy is dependent upon. Successful organizations resist the urge to jump in, and instead pause to review industry research, their own donor data, and how their practices could better resonate with donors.

##### **2. Donor input is key.**

- The most valuable insights come from donors themselves. Successful organizations ask diverse donors about their motivations, preferences, and goals. Organizations that intentionally solicit input discover that diverse donors share ideas and strategies that can accelerate fundraising.

##### **3. Diverse donors give more than money.**

- Diverse donors embrace a broad definition of philanthropy. In addition to finances, they bring their talents, time, networks, and voice to the causes they care about. Successful organizations engage diverse donors, volunteers, and leaders in ways that acknowledge this holistic approach to philanthropy.

##### **4. Leadership involvement is pivotal.**

- Successful organizations have leadership involvement that fundamentally alters the path and scope of success. Organizational decision makers control the vision, strategic priorities, and ability to move resources that allow for real transformation and big outcomes.

##### **5. Starting reveals the path forward.**

- Successful organizations realize they are creating something new with few precedents, so they start with a first initiative. They know that the success of their initial diverse philanthropy effort opens up awareness of other areas where support from diverse donors can help their mission flourish.

##### **6. The work is evolutionary.**

- The most valuable insights come from donors themselves. Successful organizations ask diverse donors about their motivations, preferences, and goals. Organizations that intentionally solicit input discover that diverse donors share ideas and strategies that can accelerate fundraising.

---

\* Developed by Kathleen Loehr, [kathleenloehr.com/how-it-works](http://kathleenloehr.com/how-it-works)



**IUPUI**

INDIANA UNIVERSITY  
Lilly Family School of Philanthropy

## **Checklist for growing diverse philanthropy:**

### **LEARN about...**

- ✓ Research on how gender, race/ethnicity, and other measures of diversity matter in philanthropy

### **ANALYZE...**

- Diversity in your database of annual givers
- Diversity in your database of leadership givers
- Diversity in the images and stories you share?
- Your data collection process – are you recording when women or other diverse constituents are giving?

### **ONBOARD your staff and leadership about...**

- The importance of engaging women donors, donors of color, and other diverse donors
- The opportunity gap identified by not engaging in efforts to fundraise from diverse donors
- Integrating growing connections to/support from diverse donors into development staff metrics

### **CONSIDER ways to take your fundraising from diverse donors to the next level...**

- Interview individuals or create a focus group of diverse donors to provide feedback and ideas for engaging these donors and donors like them
- Host a workshop so that your whole team can learn how to adapt processes and connect with diverse donors in ways that better resonate