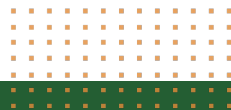




Equity & inclusion in outreach

A model for nonprofit leaders, fundraisers and communications professionals to expand their impact

An Engagement Architecture Community Report



Introduction

“**Why aren’t our supporters more diverse?**

How can we make our communications more equitable and inclusive?”

If you work in nonprofit communications, fundraising, or other outreach roles, you’ve probably heard a team member or leader at your organization ask some variation of these questions. You’ve likely also felt some pressure to solve this important, but vaguely defined, challenge.

However, reaching a diverse audience with inclusive outreach strategies is not a challenge that can be solved solely by the outreach arm of an organization. It requires partnership with internal leadership and operational functions, as well as the program and implementation staff who execute on your mission

every day. This ensures equitable practices are implemented throughout the organization, and any external efforts reflect the realities internally.

In this report, we provide a model that spans these three pillars of your organization, ensuring the outreach professionals on your team have the tools they need to do their work in a way that is inclusive, equitable, accessible and helps you reach a more diverse range of supporters. We hope you find some inspiration in these pages, or it sparks interesting conversation among you and your colleagues.

We welcome feedback, resource ideas, and open dialogue – you can always reach out to us at createchange@parsonstko.com if you want to discuss inclusive outreach practices!

How to use this guide

A few notes on usage, language, and navigation



Notes on language

What's the big IDEA?

There are multiple definitions and acronyms related to diversity, equity and inclusion. Boston University maintains a [glossary of DEI concepts](#) that aggregates various definitions.

For our research and practices, we use **IDEA** – Inclusion, Diversity, Equity & Accessibility. Accessibility is often considered separately from other DEI efforts – the IDEA acronym ensures it's at the forefront of all efforts towards inclusion.

As you read this report, consider how your organization might evolve your work in each area through the distinct lenses of inclusion, diversity, equity and accessibility.

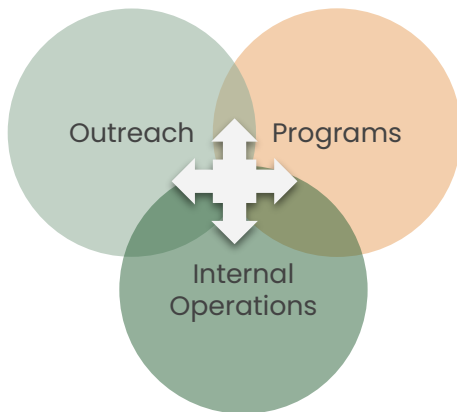
What are outreach & engagement?

We use outreach and engagement interchangeably to refer to any type of interaction with your supporters, whether they are email subscribers, members, donors or other audiences you regularly communicate with. The teams responsible for outreach and engagement functions vary by organization, but typically include teams and departments such as:

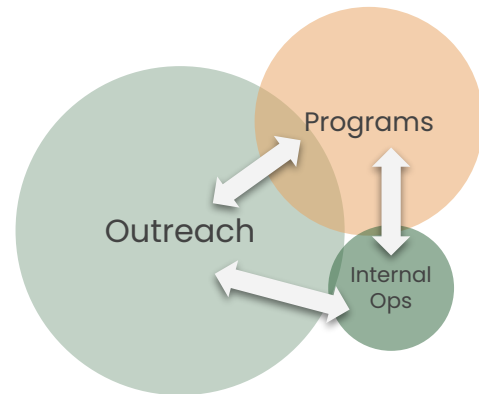
- Fundraising or Advancement
- Marketing or Communications
- Public Relations
- Membership
- Enrollment or Alumni Engagement
- Digital or IT

Who is this guide for?

IDEA initiatives are often reactive instead of proactive. Organizations respond to events in the news, or requests raised by supporters or staff. Unfortunately, this can disproportionately burden outreach teams with an organization's positioning, such as: issuing a press release, updating workflows, or auditing public facing systems for compliance. These all prioritize the external view of idealized IDEA practices. If the outreach teams are collaborating with the internal leadership and operational departments, or with programs, it is often in a siloed fashion.



Our hope is that this guide facilitates conversations between staff across all areas of an organization, to understand their respective roles in advancing IDEA initiatives, build alignment on goals, and mutually reinforce the work being done by each team. For any organization to advance IDEA values through their work, it requires equal effort and intention coordination across these three core areas of the organization.



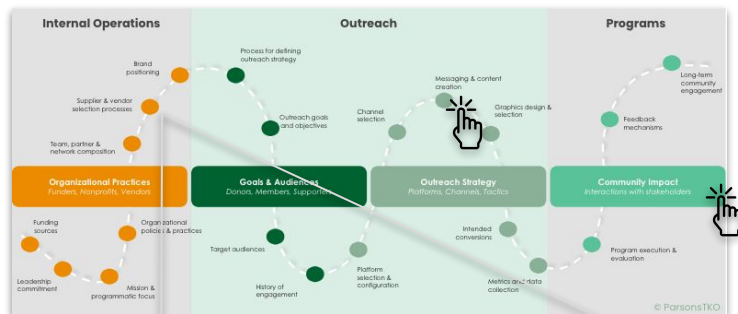
How should I use this guide?

As you read through the content in this report, consider how the ideas and examples presented here might spur action within your own organization. You might use this guide as:

- a **conversation starter** to break down silos between outreach, program, and operational teams at your organization
- a **framework to develop concrete actions**, if you already have a clear outreach goal in mind
- a **self-assessment tool**, to evaluate which areas you are already strong in, or which need work
- an **accountability tool**, to ensure your programs and operations are aligned with the messaging you're projecting externally

Check out the worksheets at the end of this document to spur some thinking!

Navigating this report



The remainder of this guide is oriented around a model for IDEA practices in outreach, including how that expands into program and internal functions. It includes four sections (rectangles in the graphic at left), that span internal operations, outreach, and programs. Each of those sections has multiple potential impact areas (dots in graphic at left). You can click on the chevrons or dots (on page 10) to jump to that part of the guide.

Each impact area has its own page with an overview, some resources for further exploration, and some include a brief case study from a nonprofit organization. When on the page for a particular impact area, icons in the top right will orient you to which section of the model you're exploring. Click on the arrow in that graphic to return to the main model if you'd like to jump to a different part of the guide.

Funding sources

Your funding may come from a variety of sources: government, private foundations, corporations, individual donors, an endowment, or even revenue streams. If your funding sources are public, you'll likely get questions about them from current/prospective staff, donors or funders, and program participants, making it critical to align funding to your values.

The philanthropy sector is seeing **increases in unrestricted grants and reduced administrative burdens**, two practices that can drive equity. However, many funders and donors still lag in their own approach to inclusion. As you evaluate current or potential funding sources or donors, consider:

- Does your funder have a public stance or brand that is antithetical to your mission or IDEA values?
- Is your funder requesting an unrealistic level of service that will adversely impact staff (e.g. a high case load)?
- Is your funder demanding data that could compromise the privacy or security of your program participants?
- What impact will donor restrictions have?
- Do you have an investment policy for your endowment that reflects IDEA values?
- Are revenue-generating services following IDEA practices?

Putting it into practice
Our Grants Management team works closely with Fundraising to manage donor restrictions. We don't accept requests for designations that are misaligned with our values - for example, to exclude a particular geography or demographic. We are accountable to our grantees, and need to ensure our funding sources don't inhibit our goals for responsive, trust-based grantmaking.

Resources for further exploration

- Social equity and Climate investing** (Intentional Endowments Network)
- Race and Equity in Philanthropy Group** (Marga, Inc)
- Values-Aligned Philanthropy** (Council on Foundations)
- Advancing Diversity, Equity, and Inclusion in Grant Making** (Open Society Foundations)
- Nonprofit Diversity Efforts, Current Practices and the Role of Foundations** (Center for Effective Philanthropy)

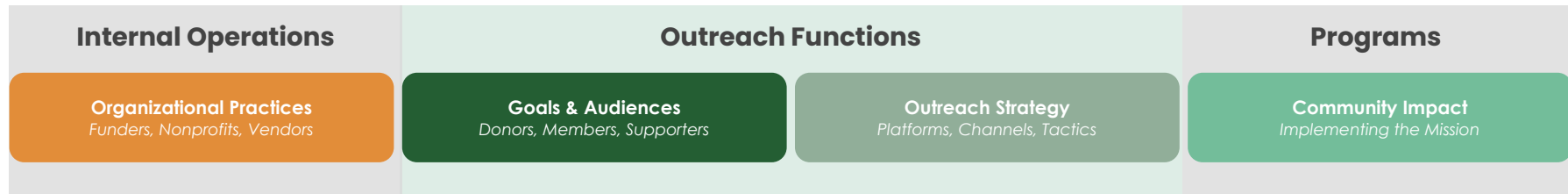
12



A model for equity and inclusion in outreach

Why another equity model?

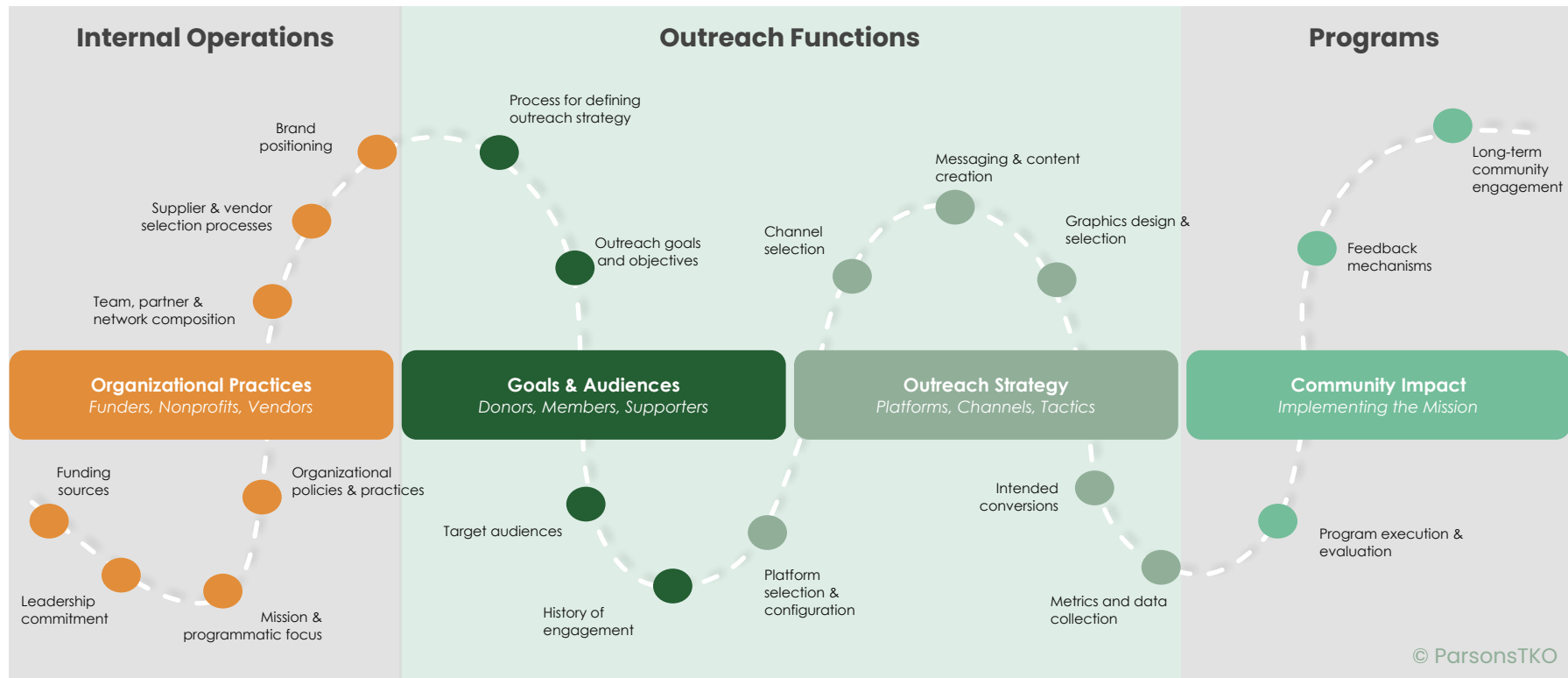
We are certainly not the first to think about IDEA in outreach practices. However, we wanted a tactical model that not only spanned all aspects of fundraising and communications functions, but also provided a framework for how other organizational practices affect outreach work. Outreach teams are a critical external face of any organization, yet often have little insight or control over operational or programmatic practices that they may be accountable for with external stakeholders.



In this report, we outline areas of impact that any organization can use to drive IDEA alignment among:

- **Internal Operations:** the organizational practices of your nonprofit, and its funders, vendors or partners
- **Outreach Functions:** the goals and audiences you target with your donors, members, or other supporters, and the strategies, platforms, channels and tactics you use to reach them
- **Programs:** the day to day work your organization does to implement its mission, and how that impacts the communities you serve

A model for equity & inclusion in outreach



Organizational Practices

Impact area overviews





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Rachel Kimber, Vice President, Grants Management, [Smile Train](#)



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[Values-Aligned Philanthropy](#) (Council on Foundations)

[Advancing Diversity, Equity, and Inclusion in Grant Making](#) (Open Society Foundations)

[Nonprofit Diversity Efforts: Current Practices and the Role of Foundations](#) (Center for Effective Philanthropy)



Leadership commitment

While it's crucial for any organization's leadership to value IDEA principles, it's even more important what they do to live out and execute against those values. Corporations, for example, notoriously pledged billions to racial justice in 2020, but have [done little to live up to those promises](#).

What does a leadership commitment to IDEA look like?

- Leveraging organizational resources (budgets, time, etc.) to advance IDEA initiatives
- Budgeting for IDEA initiatives as part of operations
- Living IDEA values in interpersonal interactions
- Sponsorship of IDEA initiatives as key to organizational success (not distractions from “real” work)
- Awareness of their own bias, and commitment to proactively educating themselves
- A willingness to publicly challenge non-inclusive behaviors, and to be challenged themselves
- Championing IDEA principles to their peers
- Mentorship to ensure individuals from underrepresented demographics receive equal access to leadership
- Accountability to public metrics and results

Resources for further exploration

[The Key to Inclusive Leadership](#) (HBR)

[Leaders Who Authentically Embrace DEI](#) (Nonprofit Leadership Center)

[Creating Cultures and Practices for Racial Equity Toolkit](#) (Race Forward)

[The Six Signature Traits of Inclusive Leadership](#) (Deloitte)

[Board Diversity Training Toolkit](#) (Pillar Nonprofit Network)



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Jeffrey Williams, Director of Communications, [Interact for Health](#)



Putting it into practice

Our cross-departmental equity committee really took off under new leadership in our organization. Since a reinvigoration of the committee, we've: created an inclusive style guide, hired a consultant to assess organizational equity, started measuring vendor diversity, built an ADA compliant office, and created a survey of staff demographics. Leaders sponsoring the initiative with investments of both money and staff time has been crucial.

Resources for further exploration

[The Key to Inclusive Leadership](#) (HBR)

[Leaders Who Authentically Embrace DEI](#) (Nonprofit Leadership Center)

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Mission & programmatic focus

Many nonprofits have missions and programs that seek to address the inequities in our society, making the values of IDEA core to the organization's purpose. However, it's also important to examine how those were developed, and how organizational priorities evolve over time, ensuring that process is accessible and inclusive of all. Consider:

- Who had input when defining the mission and focus of the organization? When was it last reviewed?
- Are the communities you seek to serve engaged on an ongoing basis in defining organizational priorities?
- How can you reduce barriers to community involvement involvement (e.g. time, money, access)?
- Can you explicitly call out your commitment to IDEA values in your mission statement?
- Are your programs driven by community-led priorities, or reactive to funder requests and opportunities?
- Have you evaluated the likely program impact to demographics with different needs and experiences?

Waldo Mikels-Carrasco, Director - CHSI, Illinois Public Health Institute



Putting it into practice

Given the structural inequities and racism in our healthcare, public health, social and human services systems, it's important that the those we serve have a seat at the table in making programmatic decisions. We engage community members in our program planning, ensuring the priorities and solutions we invest in are defined by those they will benefit. We also compensate participants for their time, and provide assistance with needs like transportation and child care.

Resources for further exploration

[How to Write an Awesome Nonprofit Mission Statement](#)
(Donorbox)

[Racial Equity Impact Assessment Toolkit](#) (Race Forward)



Organizational policies & practices

There are, of course, numerous laws that guide minimum standards for equitable hiring, accessibility, compensation, and benefits. Beyond that, an organization's internal operations and related policies say a lot about your values to your external supporters and stakeholders, and also have significant day-to-day impact on staff. Just about any department or function could be examined in detail for how to apply best practices that reflect IDEA values. While it may seem daunting to tackle them all, what is important is the practice of constant evaluation, open feedback, and willingness to evolve your practices across the organization, such as:

- Recruiting and hiring practices
- Compensation, benefits, and employee recognition
- Organizational structure
- Training & professional development
- Company policies and employee handbooks
- Employee resource groups (ERGs)
- Internal communication practices
- Information technology and data management
- Budgeting and financial management
- Legal and risk management

Resources for further exploration

[IT Accessibility Toolkit](#) (CBM)

[DEI Trainings](#) (Candid Learning)

[A Toolkit for Transformative ERGs](#)

[Building Equity into Nonprofit Finance](#) (CLA)

[Awake to Woke to Work](#) (Equity in the Center)

[A toolkit to mitigate bias in recruiting and hiring](#) (Avarna)

[Diversity & Inclusion: The 10 Policies You Need](#) (EW Group)

[Building an Anti-Racist Workplace](#) (Time's Up Foundation)



Team, partner & network composition

Research continues to show that [diverse teams perform better, are more productive, and are more engaged](#) with their team and work. Yet as humans, we all tend to have a [bias towards people like us](#). To overcome this bias takes intentionality in how we build, manage, and run any team, whether that is your staff, organizational partners, grantees, members, or any other network actively involved in your work. And for organizations aiming to portray an inclusive and equitable approach in their outreach, the composition of your team is one of the most immediately visible ways you can demonstrate your commitment to IDEA values to external stakeholders. Consider:

- What is the current makeup of our team, based on a variety of demographics, abilities, and experiences?
- What are the gaps in perspective in the group?
- Do we have a process in place for monitoring the diversity data of this group?
- Does whoever leads or manages the group establish an inclusive culture?
- Are there opportunities for training on IDEA values?
- Do we have feedback mechanisms in place to understand the experience of each person?

Resources for further exploration

[Diversity & Inclusion Toolkit](#) (Brown University)

[A Framework for Building a Disability-Inclusive Organization](#) (EARN)

[How to Build a Diverse Nonprofit Staff Toolkit](#) (The Chronicle of Philanthropy)

[Accountability Principles Assessments](#) (Puget Sound Cohort/Race Forward)

[How to Receive Feedback: Power, Difference, and Inequity](#) (The Management Center)



Supplier & vendor selection processes

Your organization likely procures a variety of goods and services from external vendors: enterprise software, merchandise, travel services, consulting or professional services, etc. There is a lot to consider when selecting a vendor, including pricing that meets your budget and the quality of what you purchase. But does your internal procurement process also include guidelines to ensure your suppliers and vendors are aligned with the values of your organization?

There is no one set of criteria that will “check all the boxes” for any single procurement. However, over time, it’s important to consider the holistic set of vendors you use. You might consider monitoring factors like:

- Diversity of the leadership and/or staff
- Fair labor practices or unionization
- Accessibility of their technology or services
- Inclusiveness of their products (e.g. size inclusivity of apparel, or inclusive gender options on order forms)
- Environmentally friendly products or practices
- Use of small, women-, minority-, or veteran-owned businesses

Reese Jimenez, Operations Manager, [Jobs with Justice](#)



Putting it into practice

It’s important that we use vendors aligned with our values – those that are unionized or otherwise known for fair labor practices. We also avoid purchasing from companies we have active campaigns against. I’ve developed internal guidance for our staff on what companies to use/not use when booking travel or hotels, ordering merchandise, and selecting enterprise communications or other service providers.

Resources for further exploration

[Fair Hotels](#)

[Guide to Responsible Sourcing](#) (ICC)

[Supplier Diversity Quick Start Guide](#) (SEMI)

[The power of inclusive procurement](#) (Wharton)

[Why you need a supplier diversity program](#) (HBR)



Brand positioning

While many communications teams have style guidelines for their work, an organization's brand positioning has impact well beyond outreach. Merriam-Webster defines brand as: *a public image, reputation, or identity conceived of as something to be marketed or promoted.*

Brand is any external perception of your organization, and inclusive branding should be considered across all aspects of an organization, such as:

- Leadership or staff's public presence
- Program names and participant experiences
- How others (donors, staff, former program participants, etc) speak about your organization
- The partners you engage with
- How media covers your organization
- Physical locations (office, event space, etc)
- ...and of course, the logo, graphics, and messaging of outreach (website, emails, social media, fundraising appeals, etc)

While outreach teams often lead on creation of style guides, consider engaging your leadership and program staff in a joining set of brand guidelines focused on inclusivity.

Ryan Yoch, Assistant Communications Manager, [The Tow Foundation](#)



Putting it into practice

We adhere to the principles of Asset-Framing, created by Trabian Shorters. This framework defines people by their potential, not just their challenges. Our programs and communications teams work together to continually update our internal style guide based on these ideas, and we incorporate feedback from our grantee partners as the best practices for inclusive, aspirational language continue to evolve. We even renamed one of our program areas, Justice & Community Wellness, to better align with these values.

Resources for further exploration

[A Progressive's Style Guide](#) (SumOfUs)

[Asset-Framing](#) (Trabian Shorters, BMe)

[Sample Inclusivity Style Guide](#) (American Chemical Society)

Goals & Audiences



Impact area overviews



Process for defining outreach strategy

It's not enough to simply have inclusive goals and strategies – the *process* through which you create them also warrants examination. Who does the this work and how it gets done directly impacts outcomes, and if biases creep into your planning process, it's hard to execute an inclusive strategy.

Whether your planning process is something done in a day, or is part of a structured annual process, it's worth asking yourself a few key questions before you start to ensure your IDEA values are top of mind:

- Are there organization-wide IDEA goals to consider?
- Does the team participating represent diverse perspectives and experiences?
- Are there potential biases in any reference materials we may be using?
- How can we be intentional about encouraging counter opinions, and avoid groupthink?
- Are any group exercises or input sessions designed with accessibility in mind?
- How will we get input from program and internal operations staff to ensure mission alignment?

Nicole Cozier, SVP, DEI & **Elizabeth Bibi**, Sr. Director of Communications, Human Rights Campaign



Putting it into practice

We incorporate equity and inclusion into goal setting processes with the SMARTIE framework. Each department receives templates, an overview presentation, and review sessions with our DEI team to ensure these values permeate every aspect of our work. This has really helped shift our communications focus from messaging *about* a particular community, to outreach that is *in coordination with* the communities we are trying to reach.

Resources for further exploration

[Designing an Inclusive Brainstorming Session](#) (Slido)

[SMARTIE Goals Worksheet](#) (The Management Center)

[Five Ways that Nonprofits Can Make Decision Making More Inclusive—and More Effective](#) (Bridgespan)

[Strategic Planning with an IDEA Lens](#) (PENN Creative Strategy)

[Crafting an intentionally inclusive marketing strategy](#) (Google)



Outreach goals and objectives

Like any goal, if your fundraising or communications team has goals and objectives around equity and inclusion in outreach, it helps to have them clearly documented. One way to achieve this, is to ensure all your outreach goals have an IDEA component to them (the SMARTIE framework on the prior page can help here). That might look like:

- Speak at three conferences....ensuring our panelists are diverse at each one
- Raise \$1M for our capital campaign...with targeted communications for donors at all giving levels

Another approach is to develop specific goals for expanding diversity or inclusion of your outreach. For example:

- Increase the participation of donors under 40 by 20%
- Add translation and accessibility accommodations to all our events

Clearly documented goals align your team around a target, and can help prioritize which other IDEA efforts you may want to focus on as you consider the other potential impact areas in this model.

Resources for further exploration

Example [goals](#) and [objectives](#) for nonprofit communications teams (Nonprofit Marketing Guide)



Target audiences

Hopefully, your outreach teams are aligned on who you're targeting as donors, members or general supporters. This may sound counterintuitive if you're trying to reach more people (as outreach teams usually are), but having more narrowly defined segments allows you to better meet each audience's distinct needs with your content and appeals.

Doing this through an IDEA lens may mean that you are seeking a more diverse supporter base, or simply that you want to ensure IDEA values are incorporated into the ways you define your target segments. Consider:

- Can you further segment your target audiences into more distinct segments that have unique needs?
- Are there groups that are underrepresented in your supporter base that you can target intentionally?
- What can you learn from past outreach data about how different sub-segments engage with you?
- Can you create a segment for a group that may be more difficult to reach, to ensure you design outreach with them in mind?
- What research might give you more insight into the sub-segments of your audience?

Resources for further exploration

[Audience Worksheet](#) (Race Forward)

[Know your audience](#) (Creative Equity Toolkit)



History of engagement

As a society, we are grappling with centuries of systemic oppression and discrimination. At an organizational level, this means acknowledging and considering this history when engaging with historically marginalized groups. It's also worth exploring your organizational history, and how it may inhibit connections and support from various potential audiences. For any audience you are seeking to engage, consider:

- What might have contributed to notable increases or decreases in support from this group over time?
- What is your organization's history of public positions on issues important to this group?
- How has the organization handled any past missteps in terms of language, positioning, or inclusion?
- Has this group been meaningfully represented in your staff, leadership or other stakeholder groups?
- How can I be accountable to this community in the ways we communicate going forward?

Awareness of this historical context should be key in shaping an outreach team's strategies for engagement. Without it, you risk doing irreparable harm to your relationship with key communities that might support your mission.

Resources for further exploration

[Learn how to apologize](#) (Anti-Racism Daily)

[7 Practices for Building a Culture of Accountability](#)
(Stanford Social Innovation Review)

[4 Checkpoints of Accountable Communication](#) (Six
Seconds)

[Ten Lessons for Talking About Race, Racism and Racial
Justice](#) (Opportunity Agenda)

Outreach Strategy

Impact area overviews





Platform selection & configuration

The set of tools, technologies, and platforms you use for outreach functions have implications both for your internal users, and external stakeholders and audiences. While accessibility is often top of mind for technical platforms, there are other equity and inclusion considerations for how your tools are set up, configured, documented, and used. When evaluating your website, CRM, email platform, analytics tools, fundraising platforms, or other outreach platform, consider:

- Are all potential user groups included in tool selection and testing processes?
- Do the chosen tools have built in accessibility functions?
- Is the language used for documentation, field names, and other text inclusive and free from terms with problematic origins?
- When you configure fields with drop down options for users, have you considered inclusive options?
- Is the tool configured to be intuitive for users of varying technical abilities?
- Do you have mechanisms to capture user feedback?
- Have you planned for ongoing budgets to support updates for discovered user needs?

Resources for further exploration

[Universal Design for Technology](#)

[WCAG Compliance Checklist](#) (The A11y Project)

[Developer Documentation Style Guide](#) (see Inclusive Language & Accessibility sections, Google)

[Accessibility Testing Tools](#) (Centre for Inclusive Design)

[Making Your Website Accessible Checklist](#) (p21, Microsoft)



Channel selection

The channels and methods you're using to connect with your supporters are a key part of your outreach strategy effectiveness. We all know that different groups of people tend to prefer different methods of communication, so any channel you select might exclude or deprioritize the experience of some prospective supporters. As you develop a channel strategy, consider:

- Are your digital channels accessible?
- Have you planned the space for in-person events with inclusivity and accessibility in mind?
- Do your channels represent a variety of modalities, e.g. digital, print, audio, visual?
- Do registration forms have options to request accessibility or other accommodations?
- What assumptions are you making about your audience's ability to access content, such as technical or connectivity requirements?
- Are you prioritizing mobile friendly channels?
- Have you considered who you are excluding with your channel selection? How might you reach them?

Resources for further exploration

[Checklist for Inclusive Events & Meetings](#) (Centre for Inclusive Design)

[Accessible Communications Guidelines](#) (Current Global)

[Mobile First Marketing Strategy for Nonprofits](#) (Wired Impact)



Messaging & content creation

As outreach and communications professionals, we know that the words we choose matter – a lot. When you are creating written content, it's important to avoid:

- Offensive language or terms
- Stereotypes that group people based on demographics
- Culturally-specific phrases or jargon that may not be universally recognized
- Complex writing that assumes a certain literacy level

It's important to consider not just guidelines for what language to use, or not to use, but also how this can be built into your content operations process so it's a part of the day to day workflow. Consider:

- Are IDEA best practices in your brand or style guide?
- Does your team regularly review these practices for potential updates to language?
- Who is involved in making these decisions? Are the communities you're communicating about part of the conversation?
- Do you have checkpoints for IDEA practices built into your publication workflows?

Resources for further exploration

[Language, Please](#)

[Media Reference Guide](#) (GLAAD)

[DEI in Communications](#) (ComNet)

[Race Reporting Guide](#) (Race Forward)

[The Language Project](#) (The Marshall Project)

[Resources an Anti-Racism Communications Strategy](#)
(National Juvenile Justice Network)



Graphics design & selection

Visual imagery can be just as important as written content in communicating with your supporters. Nearly any channel you're communicating through has a strong visual element – even audio channels like podcasts have a landing page or graphics associated with them.

- Does your user experience (UX) and visual design process have accessibility considerations built in?
- Have you considered any unintended cultural implications in your selection of colors and graphics?
- Are any data visualizations or interactive graphics tested with users of varying technical abilities?
- Are you using diverse and inclusive sources to select photography or imagery?
- If your mission works with marginalized communities, are you considering ethics and consent in your visual representations of those communities?
- Do your asset management process or platform capture and categorize diverse imagery?

Resources for further exploration

[Liberatory Design](#)

[Chart Authoring Tool](#) (Fluid)

[Inclusive stock photography](#) (Better Allies)

[Inclusive Design Toolkit](#) (Microsoft)

[Inclusive Design Guide](#) (Inclusive Design Research Centre)

[Nonprofit Photography: Ethics and Approaches](#) (ComNet)



Intended conversions

When designing a marketing or fundraising campaign, of course a best practice is to have a clear idea of your intended conversion. That could be getting your users to: sign up for an email newsletter, create an account, make a donation, attend an event, share your content, or any other form of engagement. However, what you're asking people to do can certainly have the unintended consequence of excluding certain populations. In your campaign strategy phase, make sure your targeted conversions consider:

- Technological barriers some might face, if online signups or apps are the only option
- Financial hurdles if there is any cost associated, or you have a suggested minimum donation level
- Accessibility barriers some might face with your forms, website, emails, or other interactions
- Data privacy or identity considerations, especially when certain fields are required to submit a form
- Offering multiple options for your supporters to engage if they can't participate in the primary conversion, such as: volunteering their time, contributing money, amplifying the message to their connections, or sharing their skills

Caroline Chang, VP, Community & Product Engagement, UC Innovation



Putting it into practice

When I worked at Stanford University, we historically struggled to engage young alumni as donors. While we typically had dollar targets for giving campaigns, we focused our young alum campaign on reaching a target participation rate among graduating seniors. This focused our team on reaching the largest number of people, instead of higher worth individuals, and built a culture of philanthropy that would last for years to come.

Resources for further exploration

[Inclusive & Accessible Forms](#) (Kanopi Studios)



Metrics & data collection

Data is critical to all aspects of an organization, but perhaps especially to outreach teams who use operational, outreach, *and* program data to understand audiences, and report to external stakeholders about the organization. You can ensure you manage data through an IDEA lens by considering:

- **Sources of data:** How well do you know your external sources? Are they transparent about methods? Are they inclusive? What gaps or biases might they have? Who is and is NOT included in your data sets?
- **Data collection methods:** Is data passively or actively collected? Are your channels accessible? Do you have privacy controls? Have you considered the hardest to reach or most impacted communities first? Are the options or attributes offered inclusive? Who is making the decisions about how data is collected?
- **Data sets:** Are there ethical considerations about what data you collect and store? What information *don't* you have, and how might that change your insights?
- **Data insights and analysis:** Have you avoided assumptions or generalizations about demographic groups? Have you validated insights with those impacted by your decisions?

Resources for further exploration

[Online Privacy for Nonprofits: A Guide to Better Practices](#) (Electronic Frontier Foundation)

[More Than Numbers: A Guide Toward DEI in Data Collection](#) (Schusterman Family Philanthropies)

[Privacy Compliance for Marketers](#) (p17, Microsoft)

[Equitable Research Requires Questioning the Status Quo](#) (Urban Institute)

Community Impact

Impact area overviews





Program execution & evaluation

How you execute and evaluate your programs will vary widely depending on what type of organization you are – grantmaking, direct services, educational programs, advocacy, etc. In many ways, the same questions of staffing, partners, operating procedures, communications and other functions mentioned throughout this report all apply at a programmatic level. As you consider your programs with an IDEA lens, as yourself:

- Is the program designed to reach the most vulnerable or hard to reach populations first?
- Are your program teams regularly trained on IDEA tactics and practices? Are these documented?
- Are your programs accessible to people with who have varying levels of literacy, language skills, or ability?
- Does program staff reflect the communities they work in?
- How can programs be low-barrier for those who need them most?
- Do your methods for program evaluation place undue burdens on staff or participants in terms of reporting?
- Do your data collection methods respect the privacy of participants?

Katy Lichtenstein, Director of Communications, [The Foundation For Delaware County](#)



Putting it into practice

As a community foundation, some ways we strive for equitable grantmaking are: reducing reporting burdens by asking for high level demographic categorizations, instead of detailed tracking of communities served, eliminating redundant reporting by leveraging Guidestar to track the diversity of our grantees' leadership, and involving community members in our review process to ensure they have a voice in funding decisions.

Resources for further exploration

[Equitable Evaluation Framework](#) (Equitable Evaluation Initiative)



Feedback mechanisms

Capturing feedback is critical to any function of an organization, but feedback on the execution of your core mission and programs is perhaps the most valuable to an organization. It not only helps refine the way programs are executed, but can also be a critical source of content and insight for outreach teams, who are sharing the message of your mission impact with external stakeholders.

To evaluate your feedback mechanisms with an IDEA lens, consider:

- Who are you asking for feedback from, and who's voice might be missing?
- What power dynamics exist with the program participants you ask for feedback from? Are they reliant on your services or funding?
- Have you considered accessibility needs in your feedback channels?
- Are you actively seeking both positive and constructive feedback?
- Who is interpreting the feedback and recommending actions? Is that group reflective of the communities that will be impacted by the changes?

Resources for further exploration

[Obtaining and Using Feedback from Participants](#)
(Center for Community Health and Development,
University of Kansas)

[How to create more inclusive surveys](#) (SurveyMonkey)



Long-term community engagement

Regardless your organization's programmatic focus, chances are some of your work is temporary in nature. You conduct research, provide direct services, fund a grant, advocate for a particular candidate or election – but at some point that work is done, and your team moves to the next person, issue, or initiative.

However, meaningful and inclusive change comes from longer-term engagement with the communities you serve. Without it, the job of building engagement is much harder. At best, people may forget about your organization if you aren't consistently present. At worst, if the population you serve has any overlap with your donors and supporters (as it should!), appeals for support can come across as inauthentic or even be detrimental to the organization's reputation.

Consider the role your program teams can play in communities you serve *between* higher-touch initiatives, for example:

- Partnership with other organizations
- Regular updates or information dissemination
- Events
- Requests for feedback
- Volunteer or other opportunities to engage those you serve in the work of your organization

Nardos Alemayehu, Communications Manager, [Black Futures Lab](#)



Putting it into practice

Our recurring Temperature Check Polls are not only a data collection method for our sister organization, Black to the Future Action Fund, but are also critical for establishing ongoing relationships and dialogue with the communities we seek to engage. It makes our communications team's job much easier – we know more about the issues important to Black communities, and are starting from a foundation of trust in our organization.

Resources for further exploration

[Nonprofits Integrating Community Engagement](#)
(Building Movement Project)



Tools for your organization

Where do I go from here?

It can feel daunting to try to tackle big societal challenges such as equity and inclusion. In fact, many of the folks that contributed to this report felt that they weren't "doing enough," yet still had several good examples of how their organization was putting its IDEA values into practice.

Certainly, there is more we all can do. However, the values of inclusion, diversity, equity and accessibility are not destinations to reach. They are a practice that should become a core part of how we operate on a day to day basis.

The following pages have a few worksheets that might help you and your teams get started, and find a manageable next step on your inclusive outreach journey!

Tools to get you started

- **Planning Worksheet:** lots of open space, with reminders about each impact area, to brainstorm on what you already do well, and which areas need work
- **Goal Worksheet:** if you already have a goal or target for more equitable or inclusive outreach in mind, write it at the top (we like to use the "I want to..., so that I can..." framework for stating goals) and try to fill as many boxes for how to support this goal with work in each impact area
- **Make your own:** get together a group of colleagues, and using post it notes (real or virtual, in a tool like Miro) each commit to one impact area where you'll work on an IDEA effort - hold each other accountable!

Planning worksheet

Impact Areas

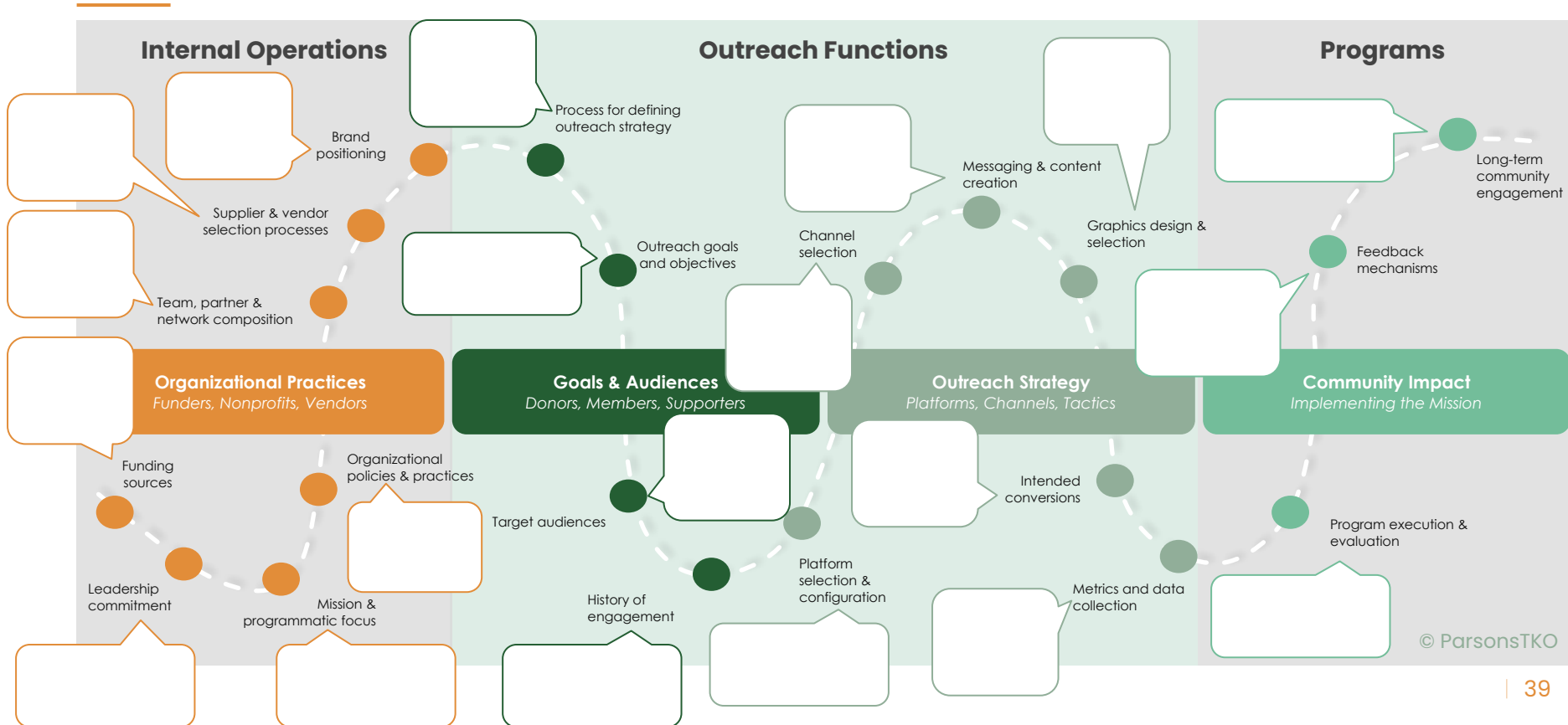
Where are we strong?
Where do we need work?

Internal Operations		Outreach Functions		Programs
Organizational Practices <i>Funders, Nonprofits, Vendors</i>		Goals & Audiences <i>Donors, Members, Supporters</i>	Outreach Strategy <i>Platforms, Channels, Tactics</i>	Community Impact <i>Implementing the Mission</i>
<ul style="list-style-type: none"> • Funding sources • Leadership commitment • Mission & programmatic focus • Organizational policies & practices • Team, partner & network composition • Supplier & vendor selection processes • Brand positioning 		<ul style="list-style-type: none"> • Process for defining outreach strategy • Outreach goals and objectives • Target audiences • History of engagement 	<ul style="list-style-type: none"> • Platform selection & configuration • Channel selection • Messaging & content creation • Graphics design & selection • Intended conversions • Metrics and data collection 	<ul style="list-style-type: none"> • Program execution & evaluation • Feedback mechanisms • Long-term community engagement

Goal Worksheet

I want to...

So that I can...





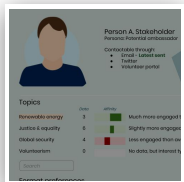
Thanks to our contributors & collaborators

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PARSONS | TKO

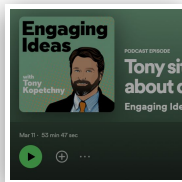
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