

DEI Fundraising Strategy

University of Michigan

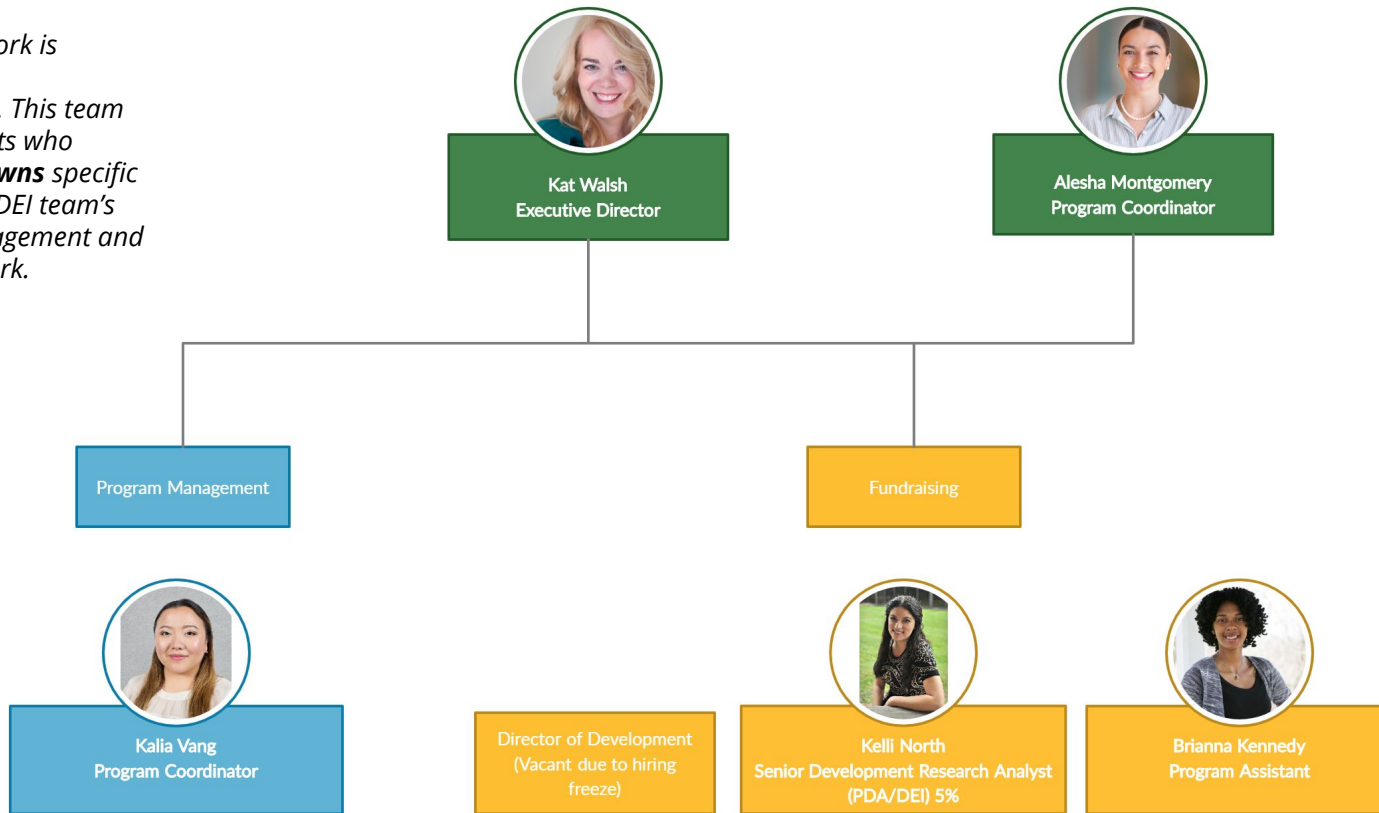
Kat Walsh

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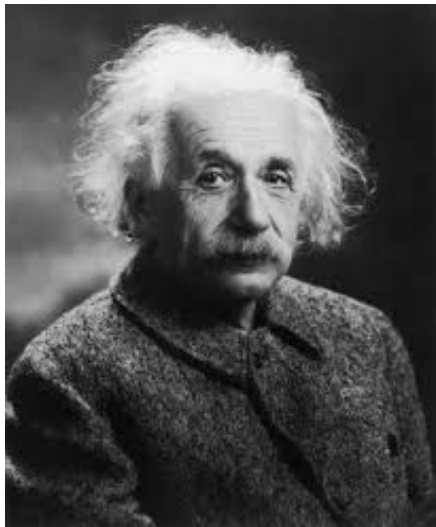
Lecturer, Gerald R. Ford School of Public Policy, University of Michigan

OUR DEI Team

Some of our work is implemented collaboratively. This team chart represents who **manages or owns** specific aspects of the DEI team's program management and fundraising work.



Shifting Away from a Solutions-based Perspective



We must find the right questions to ask first!

“If I had an hour to solve a problem and my life depended on it, I would use the first 55 minutes determining the proper questions to ask.”



Agenda

- I. Business Case: What drives our work?
- II. DEI Priorities: Impact, Priority Action Steps, and Considerations
- III. A Different Pathway
- IV. Discussion

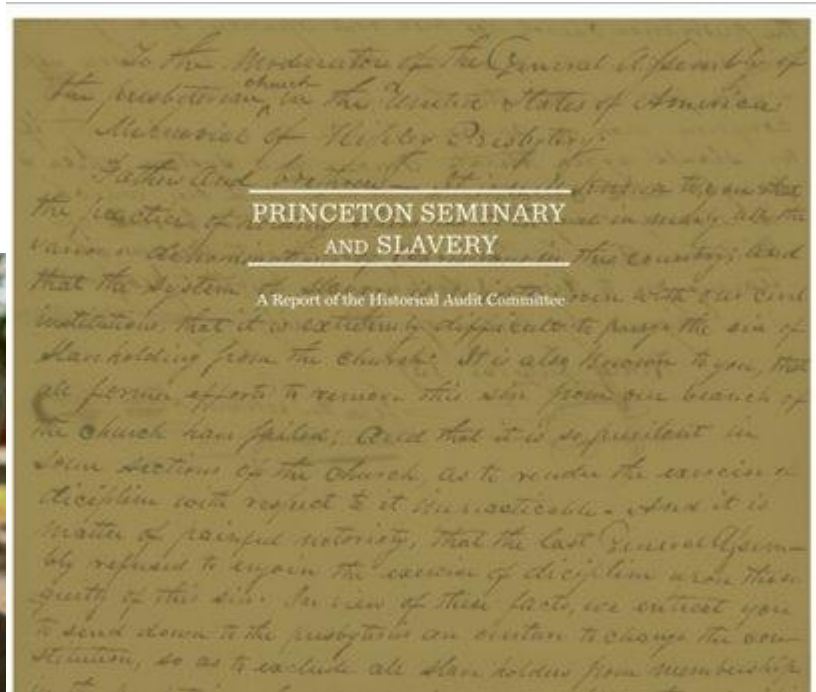
BUSINESS CASE



What drives this work?

The Moral Imperative

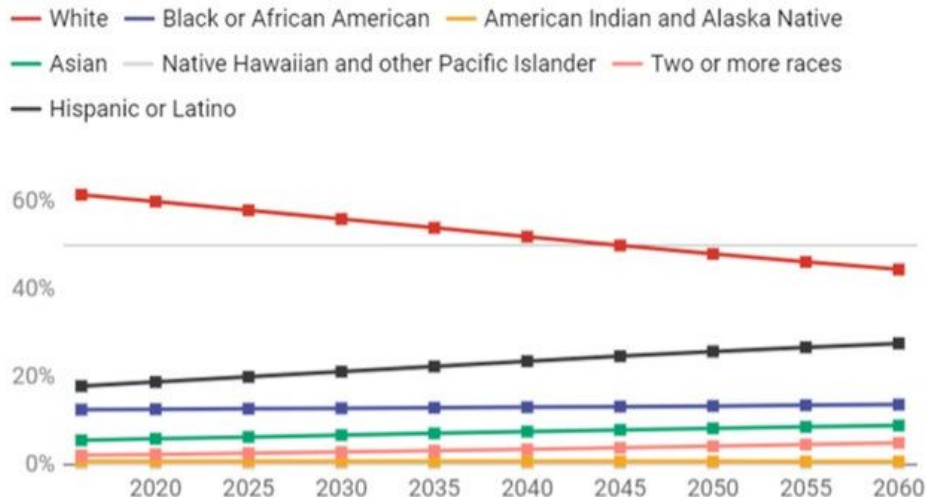
“We have a responsibility to do this work”



The Demographic Imperative

Projected race/ethnicity breakdown

After 2045, non-Hispanic whites will likely make up less than half of all Americans.



All groups not Hispanic or Latino unless specified otherwise.

Chart: The Conversation, CC-BY-ND • Source: [U.S. Census Bureau](#) • [Get the data](#)

The Demographic Imperative

"The philanthropic landscape is evolving,
driven by a young and diverse group of
donors who are reshaping the future of giving."

William Jarvis
Managing Director, Market Strategy and Delivery
U.S. Trust

WHO IS GIVING?

PERCENT GIVING TO CHARITY IN 2017



48%

of the high net worth
volunteered time
to a charitable cause
or organization in 2017



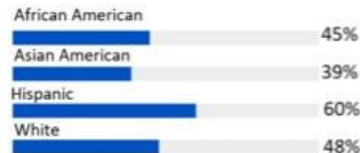
142
volunteer
HOURS
ON AVG

3

Avg. number
of charitable
organizations
engaged with

WHO IS VOLUNTEERING?

PERCENT WHO VOLUNTEERED IN 2017



The Diversity Bonus

“What’s good for the world is also good for business”

✓



Dr. Scott E. Page

- Diverse perspectives and tools enable collections of people to find more and better solutions and to contribute to overall productivity.
- Diverse predictive models enable crowds of people to predict values accurately.
- Diverse fundamental preferences frustrate the process of making choices.

DEI PRIORITIES



**FUNDRAISE FOR CRITICAL DEI
INITIATIVES ACROSS ALL
THREE CAMPUSES**

**DIVERSIFY MICHIGAN'S
DONOR BASE**

**ADVANCE A SAFE AND
RESPECTFUL FUNDRAISING
ENVIRONMENT**

**RECRUIT & RETAIN A DIVERSE
& CULTURALLY COMPETENT
WORKFORCE**

1 FUNDRAISE FOR CRITICAL DEI INITIATIVES ACROSS ALL THREE CAMPUSES

DESIRED IMPACT

To advance anti-racism work and support critical DEI initiatives across U-M.

PRIORITY ACTION STEPS

1. Work with Schools, Colleges, and Units to identify top three DEI fundraising priorities.
2. Demonstrate impact to our donors by developing and sharing a report on DEI fundraising activity.

1

FUNDRAISE FOR CRITICAL DEI INITIATIVES ACROSS ALL THREE CAMPUSES

CONSIDERATIONS

1. Balance between what the institutions need and what donors will fund
2. What “counts” as DEI? How do we reconcile conflicting beliefs?

2 DIVERSIFY MICHIGAN'S DONOR BASE

DESIRED IMPACT

Engage untapped donor segments in giving and diversify donors serving on U-M committees.

PRIORITY ACTION STEPS

1. Pilot a new prospect research test trial – alternative wealth screenings – to increase more equitable donor engagement.
2. Set policy on data acquisition and usage.
3. Test new donor engagement strategies starting with women, next gen, and the Black community.

2 DIVERSIFY MICHIGAN'S DONOR BASE

CONSIDERATIONS

1. Understand historical context
2. Is it a necessary exception or is it that we failed to do our work?
3. Question best practices (Ask yourself: “Best practices for whom?”)



3

ADVANCE A SAFE AND RESPECTFUL FUNDRAISING ENVIRONMENT

DESIRED IMPACT

Develop culture, protocols, and processes support reporting and appropriate remediation response.

PRIORITY ACTION STEPS

1. Policy and process around gift acceptance.
2. Protocols guiding engagement between donors, staff, and students.
3. Training for staff.

3

ADVANCE A SAFE AND RESPECTFUL FUNDRAISING ENVIRONMENT

CONSIDERATIONS

There is a range of behavior spanning from respectful to unlawful. We must also respond to behavior in the gray zone (disrespectful to uncivil to abusive) which you do not get fired for.

4 RECRUIT & RETAIN A DIVERSE & CULTURALLY COMPETENT WORKFORCE

DESIRED IMPACT

A workforce equipped to solve complex problems in a more racially equitable environment.

PRIORITY ACTION STEPS

1. Conduct DEI review of OUD collateral to support intentional storytelling that is reflective of our diverse community.
2. Explore strategy around pay equity and opportunity parity within OUD.

4 RECRUIT & RETAIN A DIVERSE & CULTURALLY COMPETENT WORKFORCE

CONSIDERATIONS

1. Systemic change over training

DRAFT AND CONFIDENTIAL

To: OUD Marketing & Communications - *Leaders & Best Team*

From: OUD Business Operations & Systems Committee

Date: 25 September 2020

Re: DEI Considerations for Leaders and Best Magazine (Fourth Round)

PURPOSE

Our aim is to incorporate the practice of diversity, equity, and inclusion into our OUD collateral review and production process. We want to ensure that our internal review processes include a diverse set of ears, eyes, and experiences so that we appropriately represent our diverse constituent base in our solicitations, event invitations, publications, and more.

OUD PROJECT

Leaders and Best Magazine

IDENTITY AUDIT

The information below represents an audit of diversity visually and textually. We want to stress that auditing collateral visually only provides us the opportunity to think about how we express a spectrum of diversity, however, we can only verify how people identify if they choose to self-report. The purpose of this section is to track the diversity of identities represented in collateral over the course of a FY.

Beliefs/Guiding Principles

- DEI is the core of every person's work
- Center the most vulnerable, not leadership's comfort
- Focus energy on systemic change
- Recognize and respond to doubt, fear, and low expectations
- Embrace failure as an opportunity for ownership and change
- Understand the alchemy of discomfort and resistance

A DIFFERENT PATHWAY

Institutionalized Fundraising

Not true always, but often

- Individualistic
- Focus on major gifts
- Giving comes before or in tandem with volunteering
- Typically a representative of organization makes the ask
- Hierarchical
- Giving provides access for the individual
- Promotes a deficit-based narrative



Decolonizing Wealth

We must challenge our assumptions/”best practices”



“We know what organizations look like, feel like, and function like when they are inspired by the colonizers’ principles of separation, competition and exploitation. How would they be different if they were based on principles like integration and interdependence, reciprocity and relationship?”



Other Approaches



- Collectivist
- Focus on grassroots fundraising
- Engagement with community comes before giving
- Typically respected community member makes ask
- Egalitarian
- Giving provides access for the community
- Promotes an abundance-based narrative

Considerations

- Language matters when bridging across communities
- We need to think about belongingness interventions to respond to belonging uncertainty
- We have to address the tension between needing funding NOW and wanting to engage a diverse donor and volunteer base



Reflection & Action Planning

What can you do in the next
3 months?
6 months?
9 months?