Diversity, Equity, Inclusion (DEI) and Aging: Lessons for Philanthropy

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Part 1: Overview, background & methodology
Project overview

Research questions:

• Why is aging/racial justice a public health matter?

• Why does health equity/racial justice need to consider aging?

• What does all of this mean for philanthropy?
  • Why are these things important for funders?
  • What are funders doing?
Methodology

Research:
• Surveyed available literature on the intersections of aging, racial justice/DEI, and philanthropy.
• Participated in key informant interviews.

Utilizing results:
• Developed survey questions to learn about DEI efforts among GIA members.
• Created a DEI resource compendium.
• Developed a semi-structured interview guide for GIA.
Part 2: Findings
Themes and strategies from literature review

Center communities most affected by inequity
• Proactively seek, reach out, engage grantees from these communities

Revise funding process
• Use external review committees or engage in participatory grantmaking
• Fund multi-year projects
• Fund both small, diverse and large, non-diverse organizations – encourage partnerships
• Let smaller/grassroots organizations “hold the purse strings”

Collect a variety of data

Examine/revise internal processes/operations

Shift power

Create measurable goals and remain accountable
“The approach emphasizes a careful and conscious analysis and application of strategies that result in opportunities for grant makers to support Black communities, and in a broader sense, the greater society.... That aspiration compels us to look at each individual community as a part of the whole; thereby ensuring that as Black communities are strengthened, other communities, and the nation, gain a set of tangible social, economic, and political benefits.”

“There needs to be a commitment to ongoing learning and work.”

“[Philanthropic organizations] need a common framework. Lip syncing and saying things precisely? Not going to happen... if you are making shift, it will be unfamiliar for people. Moving from one type of grantmaking to another – that requires different muscles.”
Themes and strategies from key informant interviews

**Provide professional development opportunities**
- Facilitate DEI conversations
- Train staff at all levels

**Board buy-in is essential**
- Consider creating a DEI Committee
- Build DEI into your Strategic Plan
- Work with an external facilitator

**Find out what your grantees/members need**
- Conduct a survey or field study
Themes and strategies from key informant interviews

**Build equity into RFP/funding process**
- Consider a proposal for focus groups of the people/communities you want to reach
- Test an approach of de-identified proposal review
- Increase overhead rate for grantees

**External communication around DEI**
- Develop a shared language
- DEI commitment/statement
“Hold a ‘Funding 101’ Workshop.”

“Do not ask for input [from populations that are different from you] and then neglect to take action.”

“Do not require things of your grantees that you are not doing.”

“It is imperative to work with an outside facilitator and [Board/staff] work together.”
Part 3: Discussion
Discussion questions

• Where is your organization in advancing DEI work?
• Where are there challenges? Where are there opportunities?
• What resources can GIA provide you?
• What data do you need?
References/links


Grantmakers for Effective Organizations: https://www.geofunders.org/what-we-care-about/equity

Health Foundation of Western and Central New York: https://hfwcny.org/about/strategic-plan-2020-2025/


SCAN Foundation: https://www.thescanfoundation.org/diversity-equity-inclusion/
Thank you!

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