

THE CHRONICLE OF PHILANTHROPY

DIVERSITY, EQUITY, AND INCLUSION

How to Move DEI Strategy From Paper to Practice

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Virtually all grant makers and nonprofits have committed to focusing on diversity, equity, and inclusion, both internally and in their communities. But many find DEI programs daunting, provocative, and hard to

implement strategically and sustainably. The hurdles include defining DEI, choosing where to start, making it relevant to all stakeholders, embedding it in the processes of daily work, and practicing it enough to learn and get stronger over time.

As a sector, we've made some progress but have a long way to go, and the path forward is not clear. Most organizations seem to have shifted their focus from "Why do it?" to "How should we do it?" But as Shakespeare offered, "If to do were as easy as to know what were good to do, chapels had been churches, and poor men's cottages princes' palaces."

In my recent work consulting for a variety of nonprofits and grant makers and serving as a director at a foundation, I've gained a simple-seeming insight: To effectively advance DEI — pushing past an initial focus on aspects of diversity (moving from D to E and I) — it's best to approach it as a formal strategy, and put it into action.

At the risk of oversimplifying a very complex topic and process, here are some steps to take and questions to consider at each stage.

Define DEI.

Diversity, equity, and inclusion mean different things to different organizations and individuals, so unpacking these words as a team can help make them real in ways people can embrace. At its simplest, DEI is "a [framework](#) that promotes the fair treatment and active participation of all people." More practically, it's a set of policies implemented to help set and enforce equitable norms, guide behavior, and improve decision making and outcomes. But what is it, specifically, for your organization? How you define each of these terms sets the stage for creating a vision and strategy to achieve DEI.

National grant makers like the Ford and W.K. Kellogg foundations and many regional and community foundations as well as nonprofits have done noteworthy work interpreting these concepts. (Compare Ford's and Kellogg's definitions with those from the [National Student Clearinghouse](#), the [Cooperative Extension](#), and the [United Nations](#).) By framing DEI — bringing it to earth in language that is actionable within their unique organizations — they make it easier to move from "What is it?" and "Why do it?" to "How to do it well, over time," in this particular context and place.

Here are some questions to help guide you:

- What do these terms mean for us in our organization and ecosystem?
- How can we arrive at a working, accessible definition that demystifies it enough to use?
- How does the frame, or definition, set the parameters for where we intend to focus?
- How are we moving beyond an initial focus on diversity to equity and inclusion?

Create a baseline and identify opportunities: Build the data bank.

Every good strategy starts with an analysis of the current situation at your organization and the ecosystem in which you operate, setting the context and baseline from which we hope to ascend. DEI strategies should do the same.

Questions to ask:

- Where are we today in terms of diversity, equity, and inclusion policies and practices?
- How do our DEI practices manifest both in our organization and outside of it, and what have the trends been over time?
- Benchmarks: What are others doing in this space, especially our peers? What parameters do they set, and what indicators are they using as targets to drive toward? What programs, investments, and activities are they undertaking to make real their DEI commitments?
- What do our stakeholders — staff, trustees, donors, grantees, community members, beneficiaries — tell us about our current levels of DEI and priorities moving forward?

The fruits from this data collection help clarify the path forward: They introduce concrete parameters and opportunities to undertake or adapt.

Develop a strategy.

A frequent complaint about DEI work is that it's more talk than walk — that too often, you hear broad pledges and commitments but little in the way of tangible, coordinated, sustained actions. A solution: Bring to DEI the same level of rigor and methodology that we bring to other strategies. A coherent strategy includes:

- **A vision:** a specific target destination or future state. A great DEI vision defines what change and success will look like three to five years out, detailing where the organization is headed. How does “more” materialize?

For one foundation, that translated into a description of 2027 with more BIPOC K-12 teachers and a talent pipeline; more affordable-housing units occupied as part of programs boosting health equity; and hundreds more BIPOC emerging leaders, advancing professionally, across sectors.

- **A strategy:** a set of coordinated, multi-year efforts designed to advance DEI in specific contexts. Successful social-impact strategies are anchored in a theory of how the program will produce sustained change. They clearly outline the pathway to impact and set guardrails for decision making that make sense to both those charged with driving forward and those involved in these choices. They frame what the organization prioritizes — for example, inside the building by focusing on recruiting and retaining

new BIPOC staff, and prioritizing BIPOC vendors; and outside the building in key sectors, such as health or work-force development.

An explicit strategy also helps clarify where the organization is not focusing, which helps concentrate resources and shape stakeholder relationships.

- **Metrics:** Good strategies also define specific intermediate and longer-term metrics that help the staff gauge progress toward goals. (See the questions below.) And they link to other organizational strategies and objectives. So a robust DEI strategy would both complement and supercharge innovation, growth or diversification, human resources, and programmatic strategies — it's not a standalone; it's a catalyst that enhances other strategies.

Questions to ask:

- What will successful DEI look like three or five years from now, in very specific terms?
- How are we driving toward that vision strategically?
- How will we pace ourselves, and what targets will we set to measure progress, change, outcomes, impact?

Invest meaningfully in this work.

Strategies become real when organizations invest money, time, people, and voice in implementing them. DEI is no different: Boards and management teams committed to DEI should explicitly allocate resources to it over multiple years.

The Rhode Island Foundation deployed an incremental \$8.5 million in grant dollars specifically for DEI (achieved largely by adjusting their spending policy to meet the moment). Others like the community foundations in Winston-Salem and Atlanta have created and tapped social-impact investment funds, using their balance sheet to augment DEI dollars, beyond grant making.

But not all DEI work takes financial capital. As the late James Joseph, president emeritus of the Council on Foundations, eloquently implored in 2014 when describing the future for community foundations, leaders should look beyond just the provision of funding: They should also invest “social, moral, intellectual, and reputational capital” to maximize social change. Approaches such as enhanced advocacy for policy changes, tapping into relationships and networks, and capitalizing on the power of convening can amplify DEI, too.

Questions to ask:

- What resources are we dedicating to DEI work — in terms of time, treasure, talent? What other resources can we bring to bear?

- Who else will we collaborate with to use or expand these resources and maximize our collective chances of success?

Measure, monitor, and learn.

Strategies typically falter at the implementation stage. DEI strategies are especially vulnerable, as they tend to lack specific targets, and the ‘finish line’ is not obvious. High-performing organizations:

- Create a framework for measuring progress toward achieving DEI goals, identifying key categories of actions, baselines, and reasonable targets that span the duration of the strategy.
- Create an infrastructure for capturing data on progress (aligning data requests with information grantees already collect to minimize the burden).
- Regularly translate the data into information and insight — by interrogating it and exploring what it means when targets are met or missed.
- Use the data annually to refine strategy, resources, and targets. Share it with other stakeholders to spur collective insight and collaboration.

Questions to ask:

- How will we measure DEI progress over time?
- What do our results tell us about our assumptions, barriers, and changes to the landscape?

Return to definitions, vision, strategy: Make it a practice.

By framing DEI as a formal strategy, your organization can avoid the squishy “It’s in everything we do,” or the diffuse “We always apply a DEI lens.” Its stature as a strategy helps elevate DEI as an organization-wide priority, as opposed to a marginalized effort.

Returning regularly to the definitions, vision, strategy, and metrics also helps embed — or, as the Ford Foundation terms it, “socialize” — DEI practices. They become an essential part of your organization’s language, culture, and identity, unlocking your team’s potential to bring DEI to life and advance it sustainably.

None of this works without significant focus, will, and values alignment. If this approach sounds bloodless and hyper-rational, that may be a fair criticism. DEI is complex, messy, human. But for now, “strategy” is the language of power, and power mobilizes resources, so it’s an essential pathway to change.

Read other items in this [Turning Diversity Goals Into Reality](#) package.

We welcome your thoughts and questions about this article. Please [email the editors](#) or [submit a letter](#) for publication.

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EXECUTIVE LEADERSHIP



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