



AFP Banff Compass 2019  
#SOLVEATHON INSIGHTS REPORT

# ADVANCING INCLUSION, DIVERSITY, EQUITY & ACCESS IN FUNDRAISING



FUNDRAISERS - BUILDING BRIDGES BETWEEN DIVERSE  
CAUSES, DIVERSE PHILANTHROPISTS, AND INCLUSIVE  
COMMUNITIES - FUELLING EFFECTIVE COLLABORATION  
ON SOCIETY'S BIGGEST PROBLEMS.

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## REPORT AUTHORED BY

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# SURVEYING THE FUNDRAISING LANDSCAPE

Canadian society is evolving at a rapid rate. Charitable organizations and approaches to fundraising need to keep up with the times. The increasing diversity and multiculturalism of our nation is reflected in the people, communities, and causes charitable and non-profit organizations serve, as well as in potential and existing donor populations.

Given this dynamic landscape, it's a critical time in our trajectory as fundraisers to ask ourselves a series of important questions. For example, how well equipped are we as a profession to meet the needs of diverse and multicultural communities through our charitable works and our approaches to fundraising? Is our profession a place where equality of opportunity really thrives and where all have an equal shot at a successful career? How certain are we that the work we are doing today will resonate with the changing donor population of today and tomorrow?

As demonstrated in the global Association of Fundraising Professionals' most recent strategic plan (2018 - 2020), AFP leaders - as well as a broad cross-section of members globally - are interested in pursuing these questions. Leaders and stakeholders alike recognize that now is the time to address the barriers to professional equity in fundraising, and to expand equal access to all under-represented groups in this dynamic, fast changing, and fulfilling profession in order to better understand and serve our communities and reach new donor groups.

In fact, the AFP 2018-2020 Strategic Plan calls out the promotion of inclusion, diversity, equity and access (IDEA) as a strategic priority for the organization globally, and charges local chapters with making the priority 'real' in their own contexts. The global Association of Fundraising Professionals recognizes the need to work harder as a profession to reflect the diverse populations fundraisers serve, and to take steps toward building a more diverse fundraising workforce.

By prioritizing IDEA-related issues, AFP has endeavoured to take a comprehensive look at expanding diversity in the profession so that fundraisers can better serve their communities and resonate with all potential donors.

Ultimately, as fundraisers, the goal of focusing on IDEA-related issues is:

- to maximize the full potential of the current and potential workforce,
- to tackle barriers to equality of opportunity, and
- to have a positive impact on our causes and our organizations.





# AFP "IDEA" & BANFF COMPASS #SOLVEATHON

The AFP 2018-2020 Strategic Plan highlights the “Promotion of Inclusion, Diversity, Equity and Access (IDEA)” as a key goal aligned with its guiding principles, and critical to its success. Its leaders recognize that if the Association truly reflects a diverse and inclusive professional community, it will be better-positioned to evolve and enhance its influence and mission impact.



Ahead of the AFP’s 2019 conference, Banff Compass - hosted by the Association’s Calgary & Area Chapter - that chapter wanted to learn if, and how, its stakeholders experience challenges related to IDEA (inclusion, diversity, equity, and access), and how these challenges might intersect with their members’ most pressing professional obstacles, and whether they perceive opportunities should these challenges be solved.

The Women’s Work Institute team was engaged - sponsored by the AFP Foundation for Philanthropy Canada - to explore these questions using their unique #solveathon methodology, and to support the Banff Compass attendees in co-designing a strategy and aligned tactical solutions to any identified IDEA challenges.

The #solveathon methodology was created by Women’s Work Institute / Sum Strategy to help sectors and organizations concerned with building greater equality to identify the nexus between business challenges and equality challenges and to design solutions that advance business and equality simultaneously.

The #solveathon methodology, in this context, involved:

- a pre-event survey (Insights Questionnaire) on IDEA- and business-related challenges,
- live research and strategic design during a #solveathon session with attendees at Banff Compass, and
- the production of a strategic action plan which weaves together insights from the questionnaire and event session.

The following pages are the insights from this work.

# SHARED VISION, MISSION & VALUES

During the #solveathon, attendees imagined the impact and influence they wanted to have on the world. In teams, they drafted visions and values which are amalgamated below:

## VISION FOR CHANGE

**FUNDRAISERS - BUILDING BRIDGES BETWEEN DIVERSE CAUSES, DIVERSE PHILANTHROPISTS, AND INCLUSIVE COMMUNITIES - FUELLING EFFECTIVE COLLABORATION ON SOCIETY'S BIGGEST PROBLEMS.**

### "IDEA" MISSION

(AFP International has a strategic priority of advancing Inclusion, Diversity, Equity and Access: IDEA)



To expand inclusion, diversity, equality, and access in the fundraising profession in order to increase equality of opportunity in fundraising, to reach diverse donor audiences, and to expand opportunities for charitable and professional success.

## VALUES

During the #solveathon, Banff Compass attendees identified values they believe should inform the design and delivery of solutions, as well as inspire the impact of solutions on the sector.

When acting on any of the actionable ideas/tactics outlined in this Insights Report, these values should be kept in mind to ensure they succeed in advancing the vision above.

**COMPASSION**  
**COLLABORATION**  
**ACCOUNTABILITY**  
**EQUALITY**

# STRATEGIC PRIORITIES & TACTICAL ACTIONS

## STRATEGIC PRIORITY ONE

## COLLABORATE TO ENHANCE INCLUSION IN FUNDRAISING

### *tactical actions*

- [ 1 ] CREATE AN AFP INCLUSIVITY CHARTER**

Standardize expectations for accessibility and inclusivity across AFP chapters. Work together to design role descriptions which invite members of diverse populations to apply. Translate print and online copy into various languages. Set targets for diverse representation on boards of directors (including representation from client/cause population, experts, etc.). Measure and publish AFP membership demographics to determine which populations of fundraisers are facing barriers to access the Association and its supports.
- [ 2 ] ENGAGE WITH HIGHER EDUCATION INSTITUTIONS**

Support fundraiser training program providers in communicating with diverse student populations the opportunities that the profession offers. Increase the inclusiveness of recruitment messaging. Let them know which skill sets are valuable to a working fundraiser, where training gaps exist for new-entrant fundraisers. Encourage them to add diversity and inclusion considerations to curriculum.
- [ 3 ] LET THE CAUSE DRIVE THE ACTION**

Recruit clients to staff, ambassador, volunteer, and board positions. Consult with those we serve, as well as program staff, to gain a nuanced understanding of needs and associated services. Use this information to articulate the unique value proposition of your organization, then communicate this value to potential donors. Well-aligned donor/organization relationships will increase the likelihood of long-term donor engagement.

*“As Canada’s population diversifies, it’s our responsibility to reflect that diversity or risk losing the trust of our communities. To succeed, we will need to invest and share time and social resources. If we can become more diverse and inclusive, we will ultimately broaden our reach and increase our impact by bringing communities of practice, philanthropists, clients, and patrons closer together.”*

SURVEY RESPONDENT

# STRATEGIC PRIORITIES & TACTICAL ACTIONS

## STRATEGIC PRIORITY TWO

## COLLABORATE TO ENGAGE A BROADER DONOR BASE

### *tactical actions*

#### [ 1 ] MAXIMIZE AWARENESS ABOUT DONOR COMMUNITIES

Think more broadly about the kinds of donors and communities of donors that might connect to our causes. AFP can lead, and work to feature diverse donor populations so that members can think about whether the featured population might be a fit to their organization and the cause they advance.

#### [ 2 ] CONSULT DIVERSE DONOR POPULATIONS

Appeal to existing and potential donor groups in your region by customizing methodology. Listen to existing and potential donors, learn from them about their values, their concerns, and match fundraising mechanisms to them. Consult and connect with non-donors to learn why they don't donate.

#### [ 3 ] CREATE INNOVATIVE ENGAGEMENT OPPORTUNITIES

Make a collective effort to engage donors, to raise awareness of the value and effects of philanthropy, to connect donors with one another, to feature causes and collaborative projects. Bring diverse donors together around a #solveathon or summit-style event where donors and causes can intersect and work together to increase effectiveness.

“

*Donor numbers are decreasing. Competition for major donors is increasing.*

*It's important that we steward more people toward regular charitable donation.*

*But we're failing to do this.*

*Older donors are dying.*

*We aren't engaging boomer donors.*

*Younger generations don't donate through the same channels as previous generations.*

*And Millennials? They might not have much to donate now, but they will.*

*And how will they prefer to give? We don't know.*

*All we know is that we need to prepare for major disruptions.*

*We need to find new and innovative ways of connecting donors to causes.*

SURVEY RESPONDENT

”

# STRATEGIC PRIORITIES & TACTICAL ACTIONS

## STRATEGIC PRIORITY **THREE**

## COLLABORATE TO ILLUMINATE AND SOLVE SHARED PROBLEMS

### *tactical actions*

- [ 1 ] SHARE EXPERTISE**

Establish a digital knowledge hub to share emerging research, provide basic education and resources to new-entrant fundraisers, and match seasoned fundraisers with early-career professionals in mentorship relationships. Provide high-accessibility training via webinars and other low-cost professional development opportunities.
- [ 2 ] CREATE DIVERSE AND COLLABORATIVE FUNDRAISER COHORTS**

Create cohorts that bring together fundraisers with complimentary causes. Learn each organization's particular focus and unique value proposition. Increased inter-cause understanding will illuminate opportunities to collaborate, reveal dimensions of differentiation, and equip each to appeal to donors with more holistic approaches to solving problems.
- [ 3 ] MEASURE AND REWARD COLLABORATIVE EFFORTS**

Feature collaborative projects and communicate their successes and challenges to a broader philanthropic audience in order to encourage collaborative efforts. Create an AFP Collaboration award to recognize and encourage collaborative efforts.

*“ Politically and socially, recent times are marked by divisiveness. It's our responsibility, as fundraisers, to promote unity. In order to meet the needs of current and future generations, we need to thread together as beautiful and diverse a human tapestry as possible, strengthen our resolve, and collaborate in radical new ways. ”*

SURVEY RESPONDENT



# THE PRE-#SOLVEATHON INSIGHTS QUESTIONNAIRE

## Respondent Snapshot

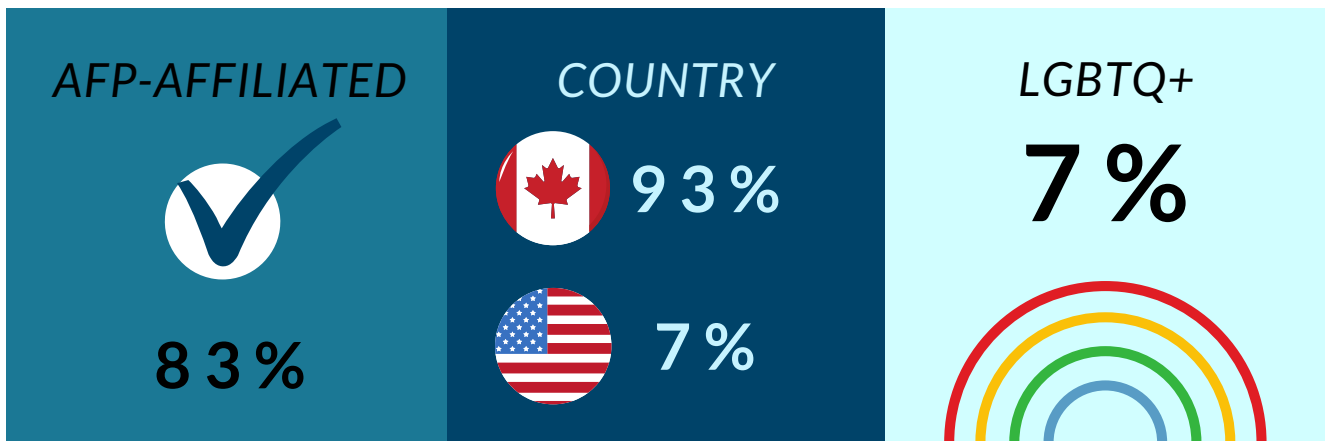
Access to the pre-#solveathon Insights Questionnaire was provided to stakeholders in the global fundraising ecosystem. The questionnaire was designed to solicit candid qualitative feedback that would shape a more nuanced understanding of the ways individuals in the ecosystem perceive their shared challenges and opportunities.

Questionnaire respondents represented a variety of organizations, diverse segments of the sector, a broad spectrum of roles, and diverse global regions.

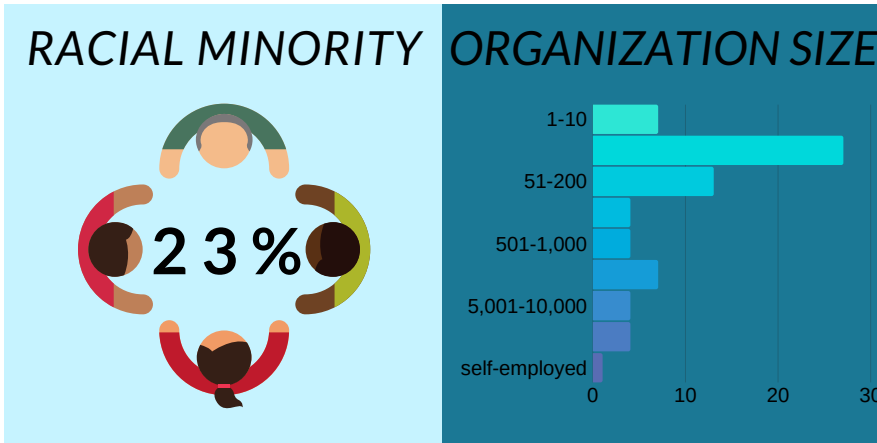


### ROLE

Coordinator Giving Senior Major Gifts  
 Director Development Fundraising Manager President  
 Development Fund Development Director Consultant  
 Officer Communications Engagement Associate Philanthropy



RESPONDENT SNAPSHOT, cont'd

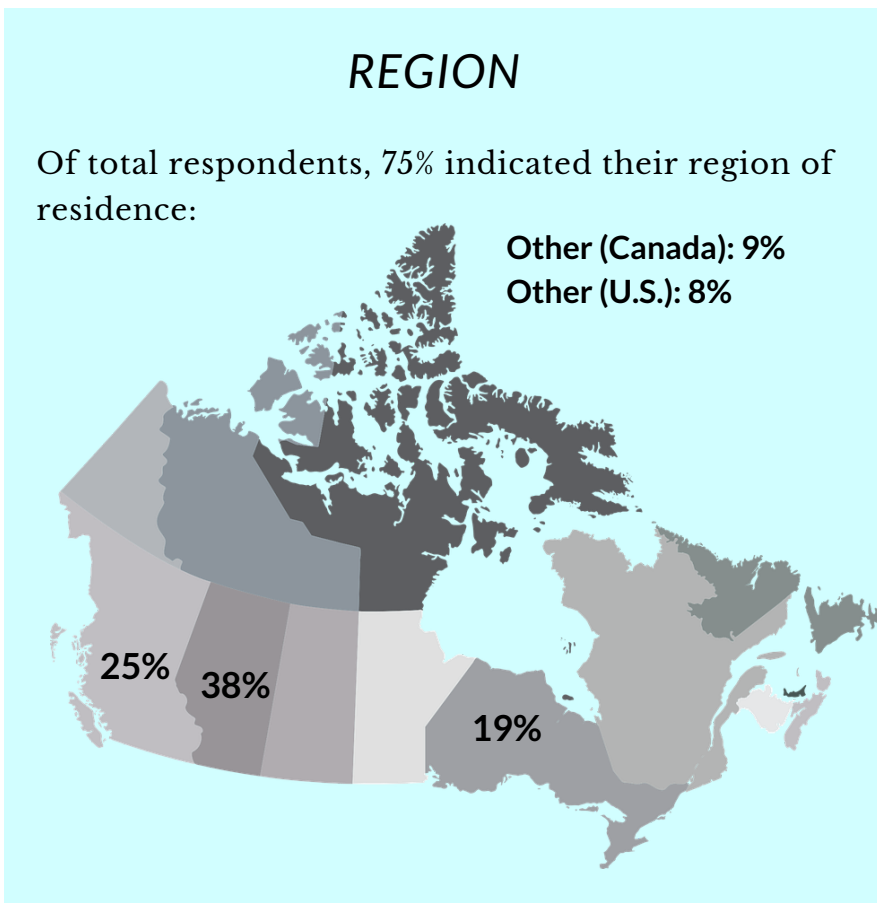


**OTHER DIMENSIONS OF DIVERSITY**

- university-educated
- higher-degree-holder
- Christian
- feminist
- introvert
- conservative
- liberal
- Catholic
- white-presenting racial minority
- Atheist
- Arab
- Native American
- immigrant
- working-class
- Jewish
- Muslim
- Agnostic
- Socialist
- millennial
- low-income
- Buddhist

“ *In my region and community, I am the only fundraising professional of colour. I have faced discrimination by potential donors because of the colour of my skin.* ”

SURVEY RESPONDENT



## THE STATE OF AFFAIRS

Despite the diversity of respondent roles, strong and consistent themes emerged from the data pointing to several expressions of challenges related to increasing Inclusion, Diversity, Equity and Access in fundraising.

58%

BELIEVE FUNDRAISING PROFESSIONALS ARE NOT EFFECTIVELY ADDRESSING "IDEA" CHALLENGES

“IDEA isn't yet an accepted topic of conversation in our boardrooms. Only when it is will we meet its challenges and reap its rewards.”

SURVEY RESPONDENT

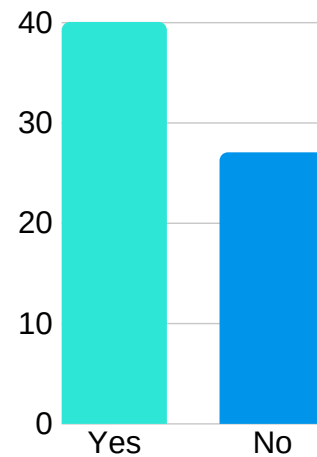
### INTEGRATED PROBLEMS - THERE IS A CONNECTION BETWEEN BUSINESS AND EQUALITY CHALLENGES:

Do you see a connection between IDEA-related challenges and business challenges?

THE MOST COMPELLING REASON TO INCREASE INCLUSION, DIVERSITY, EQUITY & ACCESS:

61% SAY:

Because it will enhance the fundraiser's ability to serve their donors/organizations/peers/communities well.



“This sector is facing significant changes. In order for fundraisers to thrive as we face the challenges ahead, we will need people with different backgrounds, experiences and identities bringing their best ideas to the table. We will have a greater chance of success if we can work together toward common goals.”

Success, in our sector, means working toward building a better world for all.

SURVEY RESPONDENT

## A NOTE ON OUTLIERS

The majority of survey respondents are champions for the "IDEA" pillar. These respondents came from all across Canada and beyond. Their conception of related challenges and advantages associated with advancing Inclusion, Diversity, Equity and Access vary across a spectrum and appears to depend somewhat on their age, the cause and constituents served by their organization, and the region in which they work.

There are some outliers, however, and in order for IDEA champions to design strategic and effective actions, they first need to consider the readiness of their fundraising colleagues and work to build awareness of IDEA-related challenges that exist in their local context.

For example, among fundraisers located in more politically conservative regions, respondents are more likely to believe inequality of opportunity does not exist in the profession, that it is a "false" problem. They assert the profession operates as an unbiased meritocracy. If they concede discrimination exists, they believe it favours female fundraising professionals because the profession is staffed predominantly by women. Furthermore, they do not believe that diversifying representation in fundraising would have any effect on the effectiveness and impact of the profession.

### OUTLIER DEMOGRAPHICS

# 100%

MALE

WHITE

ABLE-BODIED

NOT LGBTQ+-identified

“ *We only appoint the most qualified individuals to positions in our organization, whether to staff or to the board of directors. We only make decisions based on skill set and fit.* ”

SURVEY RESPONDENT

The Insights Questionnaire illuminated a diversity of perspectives within the fundraising community. Understanding these diverse perspectives will be key to effectively mobilizing and operationalizing the Tactical Actions described above.



# HOW CAN WOMEN'S WORK INSTITUTE & SUM STRATEGY SUPPORT?

Women's Work Institute / Sum Strategy is a Canadian, women-led strategy firm. We are passionate about working with leaders and organizations to connect the dots between equality, effectiveness, and prosperity through strategy.

We can help you in the following ways as you pursue these Tactical Actions and your broader goals:

- [ 1 ] We can facilitate a #solveathon to help you get clear on your organization's strategy and next steps on critical equality and organizational challenges. A #solveathon is the best way to engage key stakeholders, and to re-define challenges as solveable problems.
- [ 2 ] We can lead your next strategic planning process to support you as you work to connect the dots in your organization between equality, effectiveness, and prosperity.
- [ 3 ] We can provide you with advisory support as you work to operationalize strategic action on the strategic solutions above, or on any other challenge or opportunity critical to success in your role or organization.
- [ 4 ] You can pre-register your D&I leaders in CAMP-E[quality], a capacity-building initiative designed to help them successfully design and implement high-impact equity work.  
Learn more at: [www.womensworkinstitute.com/camp-e](http://www.womensworkinstitute.com/camp-e)

## OUR TEAM



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