

**PARSONS** | TKO

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## Welcome

- All participants' microphones have been muted & cameras have been turned off
- Please post any questions in the chat & we will review them during our Q&A segment
- This webinar is being recorded & will be distributed after the session

Who is speaking?



**Patti DeBow (she/her)**  
President

# Getting to know you

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What is your....

## Primary role/function

- Fundraising/Grants management
- Comms/Marketing/PR
- Membership/Alumni Relations
- Some other outreach function
- IT, Finance or Operations
- Other (please share in chat!)

## Industry/Sector

- Education
- Arts/Culture
- Environmental
- Health
- Social Services
- Foundation/Grantmaking
- Other nonprofit
- For profit/consultant

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# Why another Equity & Inclusion Model?

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# Why equity in outreach?

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## Who has heard a colleague say...

"Our **supporter** list is too white, too male, too US-centric, too [something]."

"Our **donors** are all older, wealthy, women!"

"How can we reach more [insert some demographic] with our **social media** strategy?"

"Our **events** draw a really homogenous crowd"

- We (generally) all agree that striving for **inclusion, diversity, equity, and accessibility (IDEA)** is the right thing to do
- The focus often falls on our external facing outreach functions
- You need clear goals: both WHAT you're trying to do, and WHY you want to do it
- Broad platitudes often = reductive, tokenization

# Tactics for getting beyond platitudes

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Many of the tactics that will lead to a more diverse donor base are also just good outreach practices.

Primarily, you want to ensure you have **very specific goals and target audiences**, from which to build our your outreach plans.

This specificity will help identify tactics that will help you expand to new audiences and demographics.

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## SO YOU WANT A MORE DIVERSE AUDIENCE?

"Reach a more diverse audience" is probably the wrong goal to achieve what you're actually looking for. Rethink your approach to outreach, and a more diverse audience will come to you.

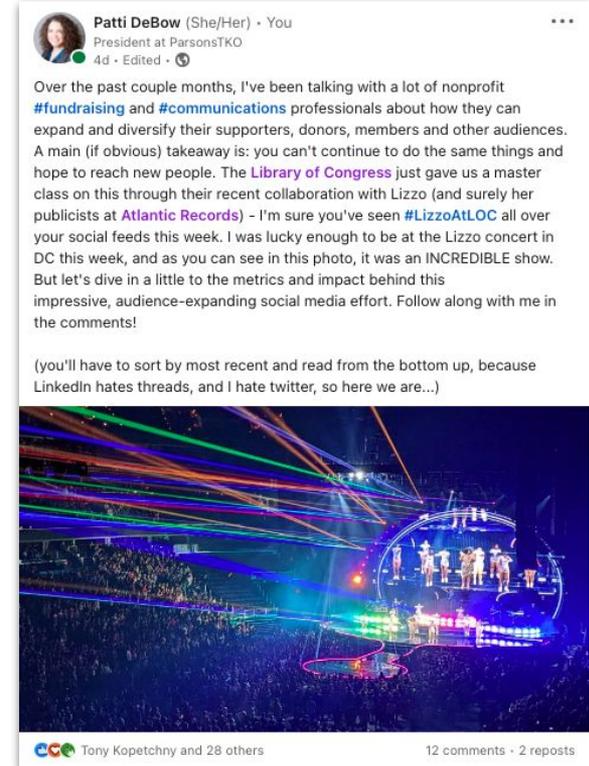
1. Be more specific about who your audience is
2. Direct each audience segment to the most relevant content
3. Invest in mobile first - across all channels
4. Build personalized experiences for individual users
5. Ensure your team walks the walk

# It's about damn time...

## ...to talk about Lizzo!

Have you been following the #LizzoAtLOC hype? It's....all over the internet, and just about every other media channel.

Take a look at the results of this campaign on LOC's twitter engagement!



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# Putting it into practice

## Developing your goals



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# Exercise: Defining your outreach goals

A first step is to turn a broad goal your team might have (e.g. “diversify my donor base”) into something more tactical.

Spend a few minutes writing down ideas using the following framework.

Maybe this is  
what LOC  
thought???

## I want to...

engage more BIPOC supporters on social media

transition low-dollar donors to monthly giving programs

increase the proportion of younger alumni donors

implement diversity & inclusion training for my communications team

## So that I can...

have a feedback loop on our content and programs that reflects the full range of our constituents

have more stability in our annual fund income

convert a historically disengaged population to becoming donors and active alums

improve our awareness of biases and potential needs when creating events

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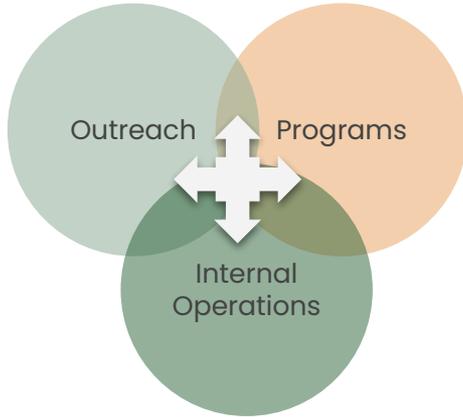
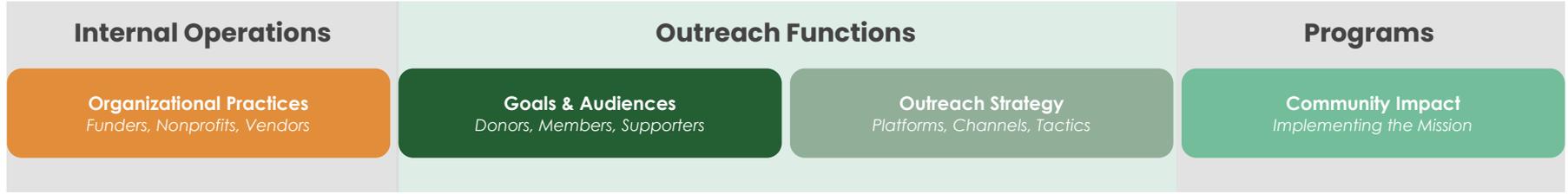
# A Model for Equity & Inclusion in Outreach

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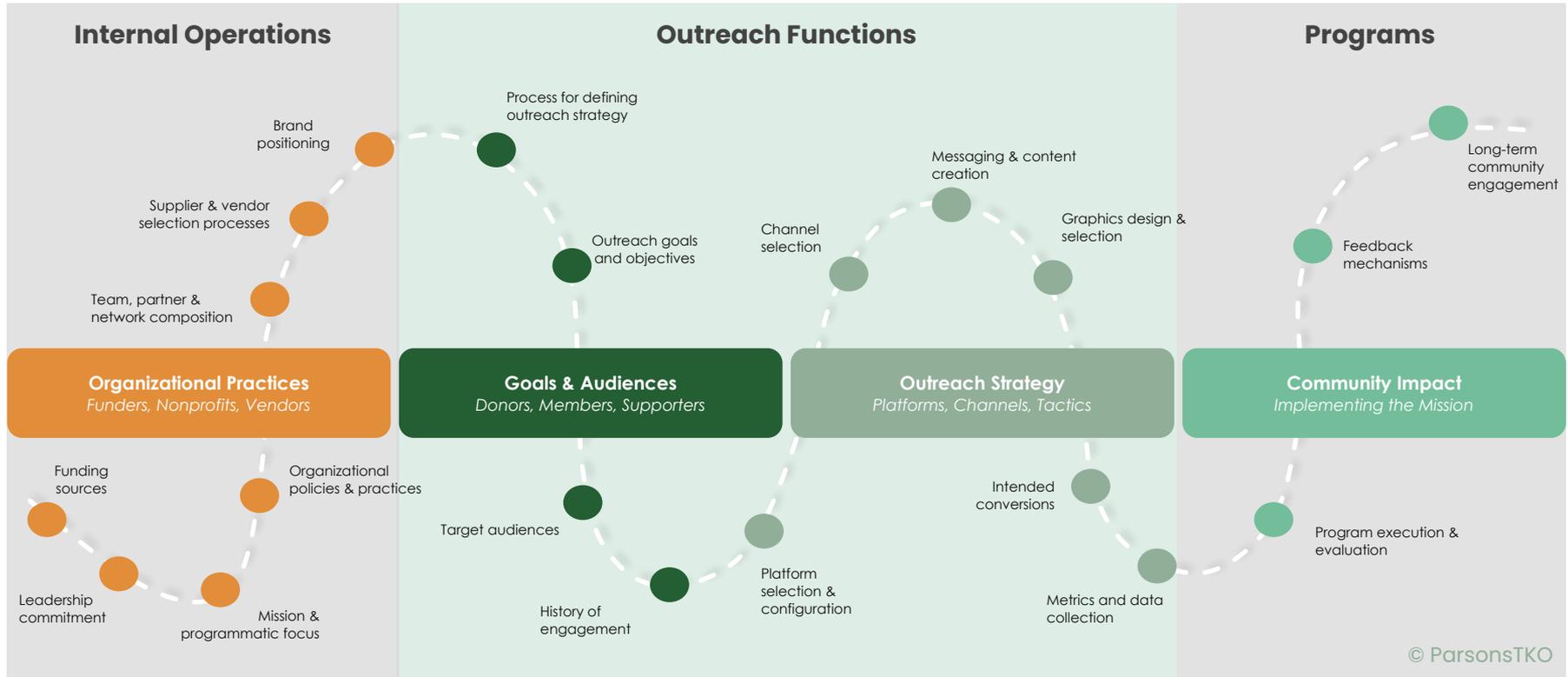
# A model for equity across all outreach

Once you have a clear goal, it's easier to think about what tactics might help you achieve it



- There are lots of models for IDEA *inside* an organization
- However, pressure often lands on outreach teams
- How can the three main pillars of an organization collaborate for coordinated efforts to implement IDEA values?
  - Internal operations
  - Outreach
  - Programs

# A model for equity and inclusion in outreach



# What's in the report

The full report details all 20 impact areas, including:

- Description of **why it's relevant** for IDEA practices
- Questions and prompts to **reflect on your own practices**
- **Case studies** of how others are operationalizing these practices
- A selection of **external resources** for further reading and reference

**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 inclusive branding of an organization, such as:

- Leadership or program name
- How others (e.g. participants, e. g. the partners, e. g. How media or Physical location (and of course outreach level appears, etc.)

While outreach teams consider engaging in various and all types of...

**Putting it into practice**

Ryan Parks, Assistant Communications Manager, [See the Case Study](#)

We adhere to the principles of Asset-Framing, created by Hobson-Shorens. This framework serves greater by their practice not just their own. Our programs and outreach efforts are built together to continually update our internal style guide based on these ideas, and we incorporate feedback from our partners.

**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 this work and how it gets done directly impacts outcomes, and it takes time into your planning process, it's hard to execute on inclusive strategy.

Whether your planning or is part of a strategic yourself a few key questions are on top of:

- Are there orgs. Does the team perspectives do
- Are there people we may be able to court? (and)
- How can we be courted? (and)
- Are any groups with accessibility
- How will we get operations started?

**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 consequences of excluding certain populations. In your campaign strategy phone, 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.

**Putting it into practice**

Heather Ewing, Director of Communications, [See the Case Study](#)

We transitioned from an inclusion into goal setting to outcomes with the IDEA framework. Each department receives feedback on revenue generation, and we've ensured with our 501(c)(3) to ensure those values permeate every aspect of our work. This has really helped with our communications team.

**Putting it into practice**

Debbie Cheng, Director of Community & Product Engagement, [See the Case Study](#)

When I started at Stanford University, we historically struggled to engage young alumni as donors. While we typically had ideal 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](#) (Kempis Studio)

**Planning worksheet**

Internal Operations | Outreach Functions | Programs

**Goal Worksheet**

I want to... So that I can...

Internal Operations | Outreach Functions | Programs

Organizational Priorities | Goals & Audiences | Outreach Strategy | Community Impact

Internal Operations: Planning, Marketing, Outreach, Support & Vendor, Brand Positioning

Outreach Functions: Outreach with Support, Outreach with Support, Outreach with Support

Programs: Outreach with Support, Outreach with Support, Outreach with Support

Organizational Priorities: Organizational Priorities, Organizational Priorities, Organizational Priorities

Goals & Audiences: Outreach with Support, Outreach with Support, Outreach with Support

Outreach Strategy: Outreach with Support, Outreach with Support, Outreach with Support

Community Impact: Outreach with Support, Outreach with Support, Outreach with Support

We've also included some templates and worksheets for you to get starter in your own planning!

# Sample Page: 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?**

What do we think the Library of Congress did well by exploring a new channel (live concerts)?

## 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)

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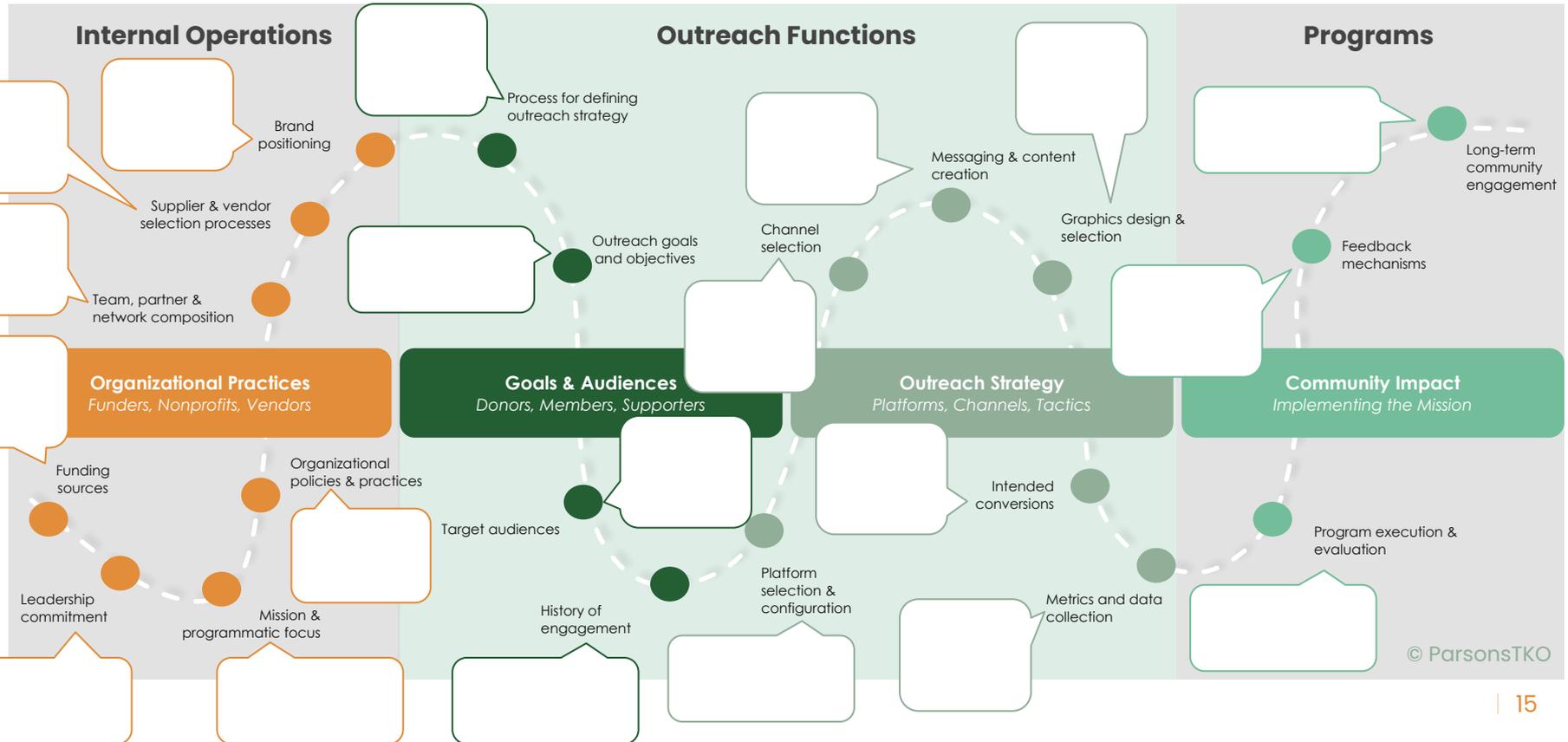
# Putting it into practice



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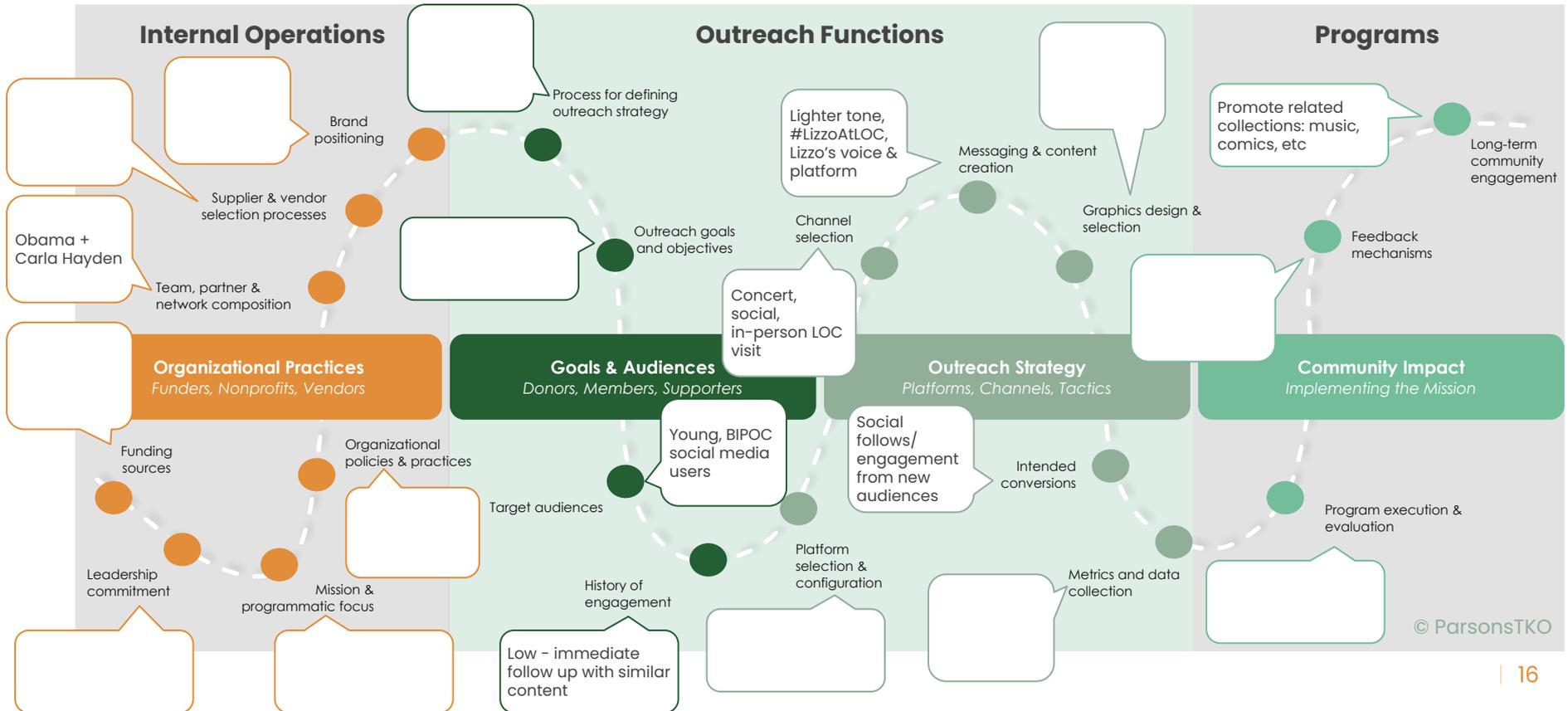
# Goal Worksheet

I want to... , so that I can...



# Goal Worksheet

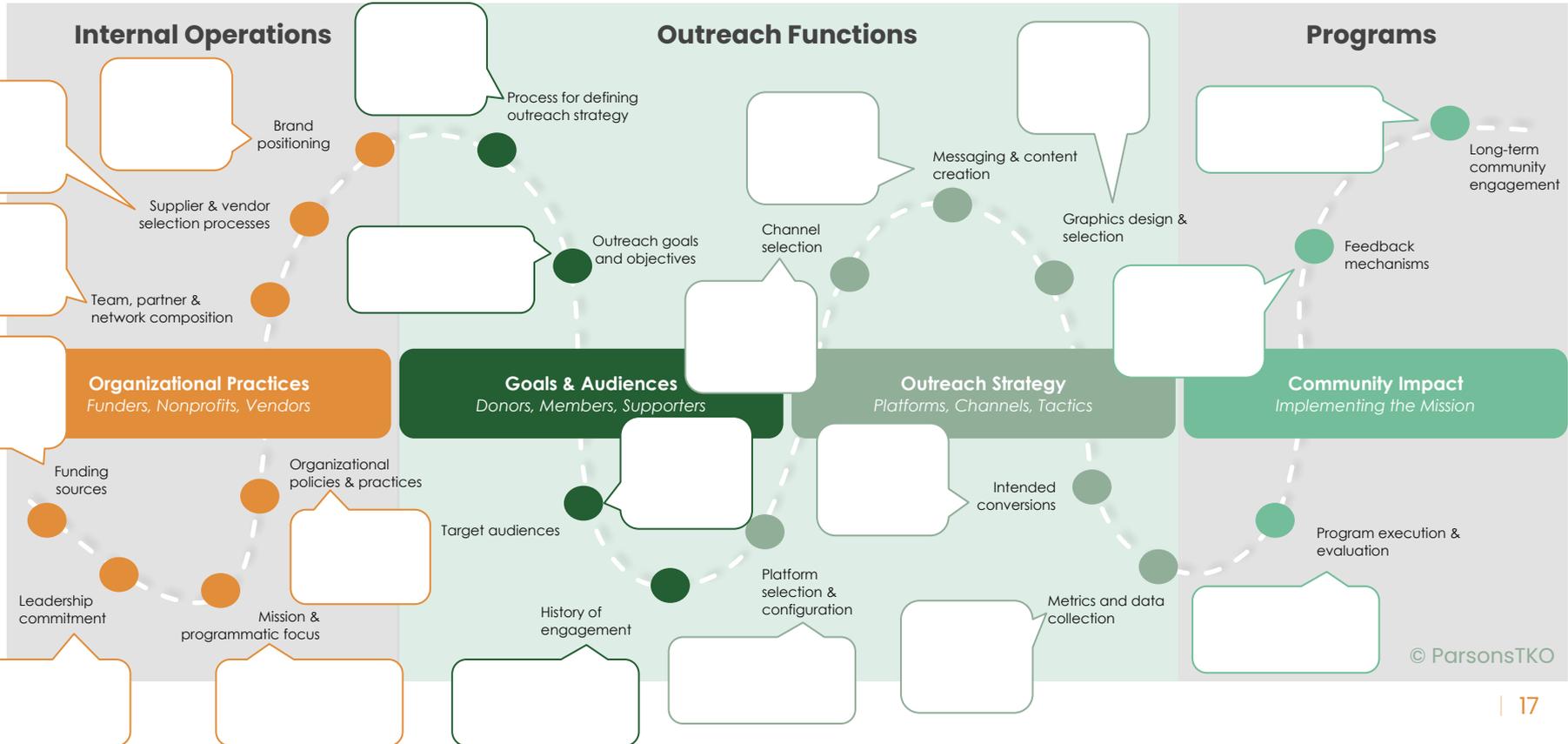
I want to...engage more BIPOC supporters on social media, so that I can...have a feedback loop on our content and programs that reflects the full range of our constituents



# Goal Worksheet

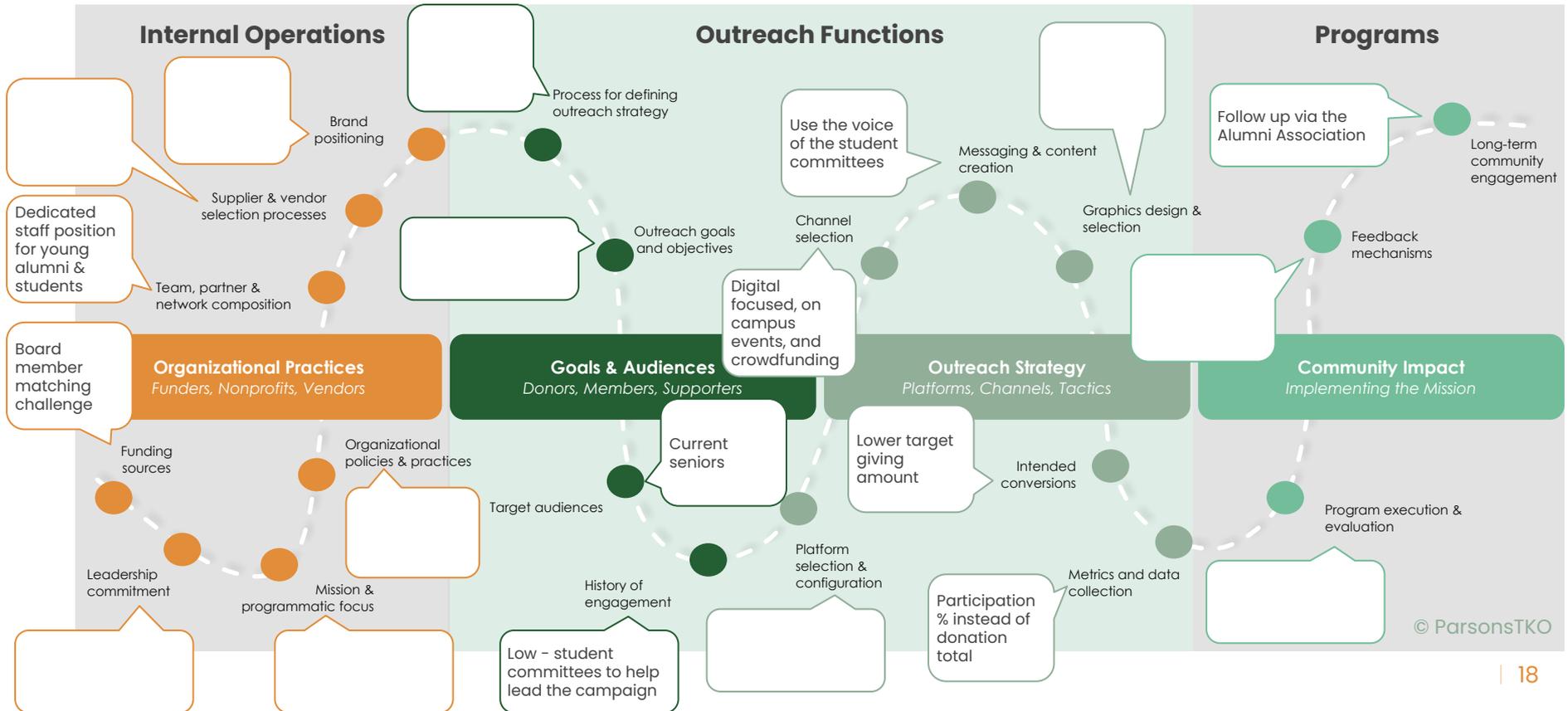
I want to... , so that I can...

Who wants to volunteer their goal for a group brainstorm?



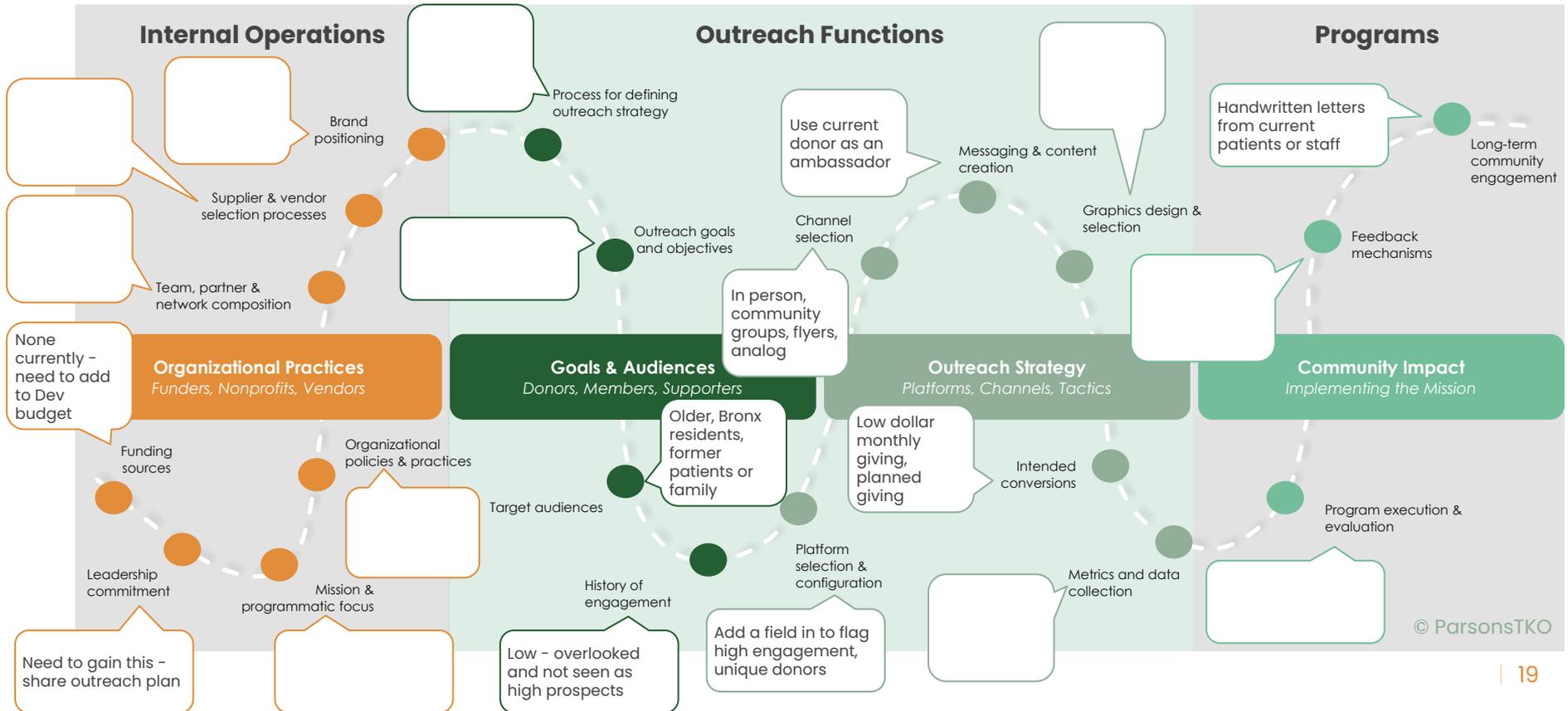
# Goal Worksheet

I want to...engage more young alumni as donors, so that I can...have long term support from a diverse, historically underrepresented group of alumni



# Goal Worksheet

I want to...leverage committed, low dollar donors as ambassadors, so that I can...identify prospects for planned giving from a more diverse range of former patients



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# Q&A



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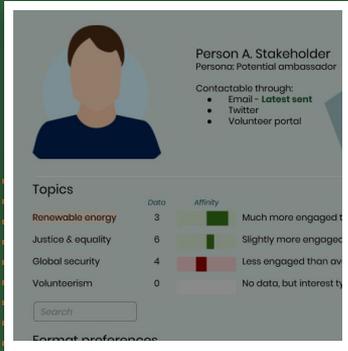
# Next Steps

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- You'll receive a follow up with all the resources we discussed today, plus a recording of this session
- We're still looking for case studies and resource ideas - please share them by emailing [patti@parsonstko.com](mailto:patti@parsonstko.com)
- Look out for a v2 of this report later this month as it continues to evolve

# Please, take our free content

[parsonstko.com](http://parsonstko.com)



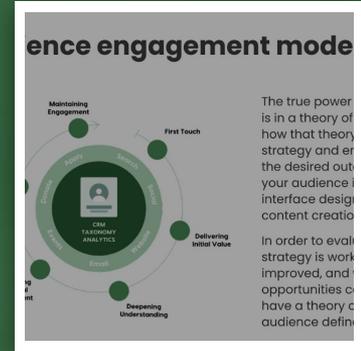
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Describe your project