

MANIFESTO FOR CHANGE

1. Background, process and evidence

In 2014, the Institute of Fundraising published its research *Who's doing the asking? Diversity in the fundraising profession*, funded by the Barrow Cadbury Trust. The IoF was not able to move forward on the recommendations at that time as the profession faced significant challenge from the press, public and regulators.

The IoF commissioned Elizabeth Balgobin to refresh the research and recommendations in 2017 and based on her recommendations established an Expert Panel to advise them in February 2018. The Panel noted the various research, undertook further workshops, and agreed that a Theory of Change should underpin the development of a strategy to make the profession more diverse and inclusive. The headline summary of that Theory of Change is set out in our published *Manifesto for Change* and includes three overarching desired outcomes, three enablers and a range of key activities, with some headline assumptions.

The next section looks at the enablers, assumptions and activities in more detail, and suggests key immediate priorities for the IoF and the fundraising community.

2. The Enablers

We have identified three key enablers to deliver our desired outcomes. Unless we succeed in delivering these, we believe all the other activities will struggle to deliver their desired outcomes.

2.1 The fundraising community at all levels buys-in to the importance of equality, diversity and inclusion (EDI).

Too many organisations do not currently see addressing EDI (or the lack of it) within their fundraising teams as a priority. Where organisations or individuals within organisations have begun to think about the diversity of their teams, we have also been told that it would be useful for them to have resources that would enable them to make the case better internally for investment in this area.

Without this buy-in from the fundraising community itself, we will not be able to achieve the fundamental changes necessary to make the profession more diverse and inclusive. For example, we could produce a fantastic toolkit on how to recruit a diverse team; or how to establish an inclusive culture, but if senior people and decision-makers are not committed to change, key opportunities will be lost.

We are developing a range of activities, some of which are set out below, which together are

designed to help win the buy-in of the fundraising community.

2.2 IoF has the skills, resources & commitment required to play an impactful leadership role on EDI, unafraid to lead and challenge

All the evidence we have seen shows that for any initiative to increase EDI to succeed, even within an organisation, it needs resources to help make it happen. But this is a much bigger change we are endeavouring to undertake. Although much of the work will need to be undertaken by IoF's members themselves, we believe there are several key roles that the IoF will need to play so that the essential changes identified to be made.

2.2.1 IoF as an exemplar organisation – staff, volunteers, governance, recruitment practices, training.

2.2.2 IoF “living” EDI in our delivery role – diversity of speakers, monitoring of delegates, marketing.

2.2.3 IoF supporting and enabling the sector – toolkits, case studies, bursaries, work with other sector partners.

2.2.4 IoF as thought leader – challenging the sector; developing relevant research;

celebrating the diversity of giving; continuing to make the business case for EDI.

All of the above means that the IoF needs the right level of skills and resources to take forward this activity. Some of this should be secured from within IoF's own resources – ensuring IoF is an exemplar organisation in relation to recruitment, or monitoring the diversity of delegates, for example.

However, some of IoF's role will need extra resources, over and above its existing revenues. Without these resources it will struggle to deliver the two other enablers – for example making the case for EDI strongly enough, to either the fundraising community or to other key audiences within the sector.

2.3 Trustees, Chief Executives and Human Resource professionals buy-in to the importance of EDI both within themselves and within their fundraising teams

There are some things that the IoF and the fundraising community can do themselves. However, a consistent message throughout our research has been that Trustees, CEOs and colleagues in HR teams need to be both diverse amongst themselves and be supportive of efforts to diversify fundraising teams.

However, many organisations find it easy to recruit the same type of fundraisers as they have

always been recruiting, and recruiting a more diverse workforce might mean more resource in terms of both time and cost. Extra support may need to be given to HR teams to come up with a diverse shortlist of candidates.

Trustees and Chief Executives may need to direct recruitment spend in a different way or sign off extra expenditure on reaching out to new communities to enable more diverse recruitment or be asked to invest more in specific training & development. And Trustees and CEOs themselves need to be more diverse to provide fundraisers with identifiable role models to aspire to.

On the positive side where there has been strong leadership on the issue from Trustees or a CEO, for example at Barnardo's, we have already been able to see the positive results.

We are pleased that we worked with ACEVO on our joint report *Racial Diversity in the Charity Sector*, and see this as a starting point for future joint activity.

3. The Activities

Some of the activities we have identified relate to a single enabler or outcome. Others relate more broadly, delivering positive results against more than one enabler or outcome. In the table above, and when described below, we set them out under each outcome, while also recognising they might well help us to deliver other outcomes or enablers.

We have also indicated what our priority actions might be, although some of these will be dependent on securing support from partners or funders, or both.

OUTCOME: ENTRY INTO THE PROFESSION IS EQUAL, DIVERSE & INCLUSIVE

3.1 Develop recruitment toolkit and training for members

Too many fundraising organisations continue to recruit in the same way, with the result that they recruit the same type or types of people. This is both at entry level and for more senior roles.

The key assumption in relation to this activity is that if we develop a toolkit then members will use it. A secondary one is that if people use the toolkit, then they will recruit a more diverse range of people into their teams.

Action 2018-19: Reach out to recruitment agencies to work with us on developing a recruitment toolkit and training for members. Begin discussions January 2019.

3.2 IoF Charter on EDI for fundraising organisations, including banning unpaid internships

In order to help gain fundraising community buy-in and drive through change it has been agreed

that we should develop a Charter on Equality, Diversity and Inclusion, for our organisational and corporate members to sign up to.

We will engage with EDI experts and our members to agree exactly what is set out in the Charter, but it will include, for example, a commitment not to use unpaid interns and a commitment to work towards a diverse fundraising workforce.

Our key assumption is that a wide group of organisational members and corporate partners will find this a useful tool to drive change, and will also want to be associated with it. It will contribute to, but also rely on, sector buy-in.

We believe this Charter will be a key tool for change, providing an incentive for organisations to embrace EDI, but also a challenge for organisations to embrace key activities and outcomes. We will insist on transparent reporting, celebrate success, and challenge where we believe organisations still have more to do.

We will gain insight for the Charter from our survey of organisational members in 2018-19, and from wider initiatives to develop charters or similar in different sectors, with the launch planned for Fundraising Convention 2019.

3.3 Develop a proactive campaign to celebrate fundraising as a career of choice

IoF already has a strategic objective to make fundraising a respected career, and it is felt this is

even more important for people from BAME backgrounds, who may in the first instance be interested in more established professions such as law or accountancy.

The general feeling is that becoming a Chartered body would greatly help the appeal of fundraising as a career of choice but the Institute would need to be careful that whilst promoting it as a profession, that it is also seen to be an inclusive one.

This activity would need to be linked to the work on roles models and outreach to specific universities, colleges and schools.

The key assumption is that if the fundraising community promotes itself more proactively as a respected and inclusive profession, it will lead to greater interest in it as a career of choice by people from more diverse backgrounds.

We plan to begin to scope this campaign in 2019/20 as part of the work on role models and with our larger organisational members.

3.4 IoF convenes proactive approach to enabling more disabled people to become fundraisers

The low overall employment rate for disabled people is a society-wide issue, but is one that we

should be committed to address within the fundraising community.

The first step is to better understand the numbers of disabled fundraisers already in the profession and to work with experts to better understand what the specific barriers might be and what we could do about them. The Institute should also reach out to a wider group of disability focused and disabled-led charities – Sue Ryder, Leonard Cheshire, RNID, Scope, RNIB, Inclusion London, reclaiming Our Futures Alliance to encourage them to engage in this work.

The Institute will also research the Disability Confident Programme and trusts and foundations developing work to support disabled people.

The key assumption is that we will be able to develop a specific programme to engage disabled people in fundraising. The secondary assumption is that if we take that specific action disabled people will be interested in it as a career.

We will engage with a wider range of disabled people's organisations over the remainder of 2018-19, with a view to identifying what specific actions we could take to support disabled people into the profession.

3.5 Research the gender imbalance with a view to attracting more men into fundraising

The data shows that the vast majority of fundraisers are women, with fewer than 30% of fundraisers being men.

The Panel believe that we should aim for a better gender balance between men and women in the fundraising community, and this research will aim to understand why the current imbalance exists, and what might attract more men into fundraising.

The assumption is that further research would lead to a better understanding of the underlying issues which the sector could then work to address.

In Spring 2019 we will develop a research brief to better understand the issues and explore the reasons so few men are recruited into fundraising.

3.6 Work with partners to establish outreach to universities and schools, with a specific focus on engaging a diverse pool of people at entry level, as part of a thought through campaign to establish fundraising as a respected career path

IoF will seek members' views on, and then potentially lead on, developing a fundraising community wide approach to outreach to universities and schools as part of a significant programme to promote fundraising as a career of choice for a diverse range of people.

This programme would need to work with established credible role models from diverse backgrounds. It would include working with credible partners in relation to different aspects of EDI, Student Pride, for example, to ensure the programme reached out with integrity and inclusivity. It may involve regional or national approaches, potentially enabling charities to reach out to Universities, schools and colleges in their own locations.

There are several assumptions here, as well as important interdependencies. The key assumption is that some UK charities will be interested in a sector wide, or more geographically targeted, approach to promoting the profession as a career of choice at entry level. This is likely to be dependent upon succeeding in gaining buy-in to the case for EDI, as some, particularly larger charities, do not feel the need to invest in recruitment as they receive large numbers of applications at entry level.

The success of any scheme will also depend on creating a powerful set of role models willing to outreach to universities/colleges/schools, and creating a powerful story about the fundraising profession as being a career of choice. Chartered status may be helpful in this regard.

As part of the EDI survey in 2018-19 we will gauge interest in the potential for a sector wide

initiative to promote the profession to universities and schools.

OUTCOME: PROGRESSION AND RETENTION WITHIN THE PROFESSION IS BASED ON MERIT

3.7 IoF establishes and supports affinity networks, and encourages members to have affinity networks

Under-represented communities need to be able to meet “people like them”, so they can share experiences and find solidarity through community. We already have Black Fundraisers UK and Fundraisers in Christian Organisations Special Interest Groups, but there has been interest in a LGBT+ affinity group, and we should consider whether we need a coherent approach to these affinity groups across all aspects of diversity, supported by IoF centrally. We should also consider whether we should encourage our larger members, as part of the proposed EDI Charter, to establish their own affinity groups.

The assumptions here are that people from these different diverse communities will welcome and engage with these affinity networks and that they will encourage more people from these diverse communities into fundraising, and support them to stay in fundraising. These affinity groups will have a strong voice in ensuring IoF, and our members, continue to engage with EDI as an issue, raising issues as necessary.

The operational assumption is that the IoF will have the resources to support these affinity groups.

During Autumn 2018-19 IoF will initiate a review of IoF's overall approach to affinity groups, and support the establishment of new ones as and when resources permit.

3.8 Access Fund established and grown to enable diverse fundraisers to take part in conferences, training and qualifications around the UK

We established our Diversity Access Fund and ran our first campaign "Fundraising Convention is for Everyone" in May 2018, raising £12,800 for bursaries including £5k from the IoF, and funding 24 places for fundraisers from BAME, disabled and LGBT+ backgrounds. We need to expand this fund to cover our wider activities, and to include aspects of supporting women into leadership positions. We need to engage our National, Regional and Special Interest Groups in the Access Fund.

The assumption is that bursaries, correctly sculpted, will help people from under-represented communities gain entry to the profession and develop within it. The second assumption is that we will be able to find funding to support those

bursaries, and that people will then apply for them.

During 2018-19 we will learn the lessons from our first appeal and bursary programme, and develop our strategic approach for our Access Fund moving forward, including working with our National, Regional and Special Interest Groups.

3.9 Women in leadership programme

Women make up 70% of the profession but this is not matched at senior level, and issues of gender discrimination remain. Women are clear that more research is necessary to understand the underlying causes of this, but are also clear that specific issues can help, such as ensuring there are flexible working practices (this can be picked up in the proposed Charter) and that these are well promoted. Specific leadership support activities should be considered for women, as well as making sure senior women act as role models for women progressing their careers. This work will be even more important as we work to encourage greater gender balance within the fundraising community.

The assumption is that further research will lead to a better understanding of the underlying issues which the sector can then work to specifically address.

In Autumn 2018 we will develop a research brief to better understand the issues and explore the development of a targeted leadership development programme for women in fundraising.

3.10 Encourage proactively communicated flexible working policies

Flexible working policies are particularly important to enable disabled people to fully engage in the workplace, and also for women/men to manage childcare responsibilities. From a recruitment perspective, it is also really important not just to have these policies but to publicise them widely in advertising and as part of the recruitment process.

The assumption is that if all charities and fundraising teams had widely communicated flexible working policies that more disabled people would enter the profession and that women would be more likely to progress equally to men. Interestingly people are clear that flexible working is just as important for men as women, so that men as well as women can take on care responsibilities etc.

In 2018-19 we will develop an exemplar flexible working policy for our members to consider and adopt.

**OUTCOME: FUNDRAISING IS, AND IS
ACKNOWLEDGED TO BE, AN EQUAL, DIVERSE
AND INCLUSIVE PROFESSION**

**3.11 Develop and disseminate a powerful
legal, business, moral and emotional case
and related campaign to increase the EDI of
the profession.**

The case for EDI still needs to be made to many in the sector for them to fully buy-in to taking action to increase EDI with the profession. This is absolutely vital as buy-in from the fundraising community is essential if the other activities are to be useful or are to be undertaken by our members.

This is something for the IoF to lead on, calling on support from others as necessary.

We believe there are a number of activities within this:

- Agree a final, compelling case for making the profession more diverse and inclusive
 - Tailor the case to different audiences, including senior fundraisers, CEOs, Trustees, funders
 - Develop a campaign and undertake appropriate engagements with IoF members to make the case for diversity for example through Director Networks, Strategy Forums, conferences and events
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- Create and disseminate appropriate blogs, case studies and research reports which support the case for EDI

The key assumption in relation to this activity is that if we develop a compelling case and campaign that members will buy-into, and will then proceed to invest in, the activities.

In October 2018 we will a survey of IoF Organisational and Individual members to assess the current diversity of their fundraising teams, and test their appetite for future action.

3.12 Role model / "Real model" / ambassador programme developed and rolled out of diverse fundraisers, CEOs and Trustees

The sector should contain senior figures from diverse communities, who can act as role models. This is generally important as people want to see people like them in the career they are considering or already pursuing. This is particularly important at a senior level.

However, it is different for different characteristics, so a range of diverse role models will be needed. For example, in relation to BAME, LGBT+, disabled people and men, role models are needed to show that people from these backgrounds are already successful in the profession, with a view to increasing the number of people with those characteristics into the profession.

In relation to women, the role models are more important in relation to successful senior women in the sector.

In relation to LGBT+, we do not have definitive data, but there is an assumption that there are senior LGBT+ fundraisers, but the fact that they are LGBT+ may not be widely known.

The key assumption is that if we develop a role model programme, and roll it out, then it will lead to a greater diversity of people considering a career in fundraising. A secondary assumption is that we will be able to find a sufficient number of diverse people who are willing to be role models and/or ambassadors.

We plan to begin to scope this programme in autumn 2018/19 initially engaging with the first cohort of people who received Access Fund bursaries and other fundraisers from diverse backgrounds to develop the programme.

3.13 IoF embeds EDI within its governance, services and programmes, with a specific initial focus on Fundraising Convention

The IoF has a clear leadership role to play within the fundraising community, and as part of that it needs to ensure that it embraces EDI within its own activities (policy work, conferences & events, training & qualifications) and within its governance structures. The Trustees, staff and volunteer team need to be comfortable with EDI issues, and EDI

aspects of all activities need to be considered and acted upon.

As part of this, the IoF will consider whether there should be specific programmes or events targeted at specific diversity groups, for example, a BAME and LGBT+ mentoring programme, BAME paid internships, or a women speaker only conference.

From a governance perspective, the Board of Trustees will review and set out targets for its membership, that of its Committees, its Membership Communities Committees and overall membership.

A key priority within these programmes will be the Fundraising Convention, IoF's annual flagship event. This will focus on securing a diverse range of speakers, a more diverse group of delegates as well as sessions supporting the sector on its journey to becoming more equal, diverse and inclusive.

The key assumption is that the IoF needs to have credibility in its leadership role as the professional body. The assumption is also that only by monitoring the engagement of fundraisers from diverse backgrounds in its membership and services will it be able to properly address weaknesses. Another assumption is that if the Institute fully embraces EDI, its membership and the wider community will follow.

In 2018-19 the IoF will establish a baseline for the diversity of its governance. It will also ensure that all of its Trustees, staff and volunteers are trained in aspects of EDI and that an ongoing programme of training is planned. It will also establish a baseline for the diversity of delegates to its conferences, training and events.

In Spring 2019 it will engage with our National, Regional and Special Interest Groups to agree targets for the diversity of their Committees, and to begin to develop group plans to improve EDI within their specific communities.

The IoF will focus on making Fundraising Convention 2019 the most equal, diverse and inclusive ever.

3.14 Encourage and support others to drive forward EDI amongst CEOs & Trustees

CEOs and Trustees are key in driving the culture of an organisation, and key in setting EDI as a key priority corporately, and for the HR and fundraising staff. The evidence we have collected also shows that it is very important for fundraisers to have diverse role models at a senior level within organisations they work for or who they are thinking about working for.

We are also aware that EDI is on the agenda of a range of partner organisations – ACEVO, NCVO, the Charity Commission, NPC – and believe these are the key partnerships to drive forward EDI across the sector as a whole.

The key assumption is that partners will share our agenda and be happy to work with us to drive forward EDI at a strategic level within CEOs and Trustee Boards. The secondary assumption is that if we can achieve change at that level it will then support our activities within the fundraising community.

In 2018-19 we will engage with government, ACEVO, NCVO, NPC, Charity Commission and others to discuss a coordinated cross-sector approach to encouraging EDI at the most senior levels within charities.

3.15 Develop and champion case studies of success in relation to equal, diverse and inclusive teams

In order to secure buy-in from Trustees, CEOs, HR teams and the fundraising community it has been identified as of paramount importance to publicise effectively case studies of success in relation to EDI. Due to the existing demographic of the fundraising community in the first instance these may be primarily from initiatives outside the fundraising community, but on an ongoing basis

IoF should seek to share case studies of success from the fundraising community in the UK and abroad.

The key assumption is that providing case studies of success will help secure buy-in from Trustees, CEOs and the fundraising community. Other assumptions include that there will be case studies of success and people will be willing to share them.

Beginning in Autumn 2018, we will develop a programme to collate and share case studies of success in a variety of ways through social media, events and newsletters.

4. Definitions, assumptions, measurement framework and accountability

4.1 Definitions and clarifications

This document sets out our direction, but it is neither a strategy nor detailed plan

This is a high level, strategic document, so you will not find much detail about specific activities. Please know that this detail will follow, but for now, should you be looking for what we expect our members to do to tackle islamophobia or antisemitism (for example); or to specifically recruit more African Caribbean Fundraisers, or for a specific target for disabled fundraisers within different sizes of organisation, you will be disappointed.

However, we still expect our members to tackle these issues. We want to tackle all forms of discrimination within the fundraising community, and create a truly equal, diverse and inclusive profession, but that level of granularity is not possible within the scope of this Manifesto.

Based on this Manifesto we will develop a formal strategy to increase Equality, Diversity and Inclusion within the fundraising community, to launch at Fundraising Convention in 2019. This will include more detailed plans, timescales and the resources we believe we will need to deliver this Manifesto. It will also include a detailed Measurement Framework.

The measurement framework will track progress against the strategy and will include tools such as our bi-annual perceptions survey; delegate EDI data; membership EDI data; and a range of further survey data.

Intersectionalities

For ease throughout this Manifesto we talk about specific protected characteristics, but we are acutely aware of the many intersectionalities that exist, and the added barriers and prejudice that people with more than one protected characteristic face.

LGBT+ – there are multiple acronyms that are used to define people from a wide range of different sexual and gender identities. For ease we have used LGBT+ to cover lesbian, gay, bisexual, transgender,

queer, intersex and all other sexual and gender identities.

BAME – this covers all people from Black Asian and Minority Ethnic backgrounds.

Disability – We believe in the social model of disability, and therefore use the terminology “disabled people” throughout. The social model of disability is a way of viewing the world, developed by disabled people.

The model says that people are disabled by barriers in society, not by their impairment or difference. Barriers can be physical, like buildings not having accessible toilets. Or they can be caused by people's attitudes to difference, like assuming disabled people can't do certain things.

The social model helps us recognise barriers that make life harder for disabled people. Removing these barriers creates equality and offers disabled people more independence, choice and control.

Not everyone uses the social model and that's okay.

Positive action – We believe that the fundraising community needs to take positive action to address the current inequalities in the workforce. That means tackling barriers that exist which prevent people entering and progressing equally within the profession.

Equality, Diversity & Inclusion

We are absolutely clear that the fundraising community has to embrace all three of these words. Equality is a core charity value, and we expect all our members to ensure that their approach to recruitment and progression is based on principles of equality and merit.

We are focusing on three aspects of diversity – ethnicity, gender and sexual identity, but we expect our members to address all aspects of diversity. But diversity itself is not enough, we want our members to fully embrace inclusion, so that everyone feels as though they “fit” within the fundraising community. They don’t just join an organisation, but the culture welcomes them and they progress.

4.2 Assumptions

We have set out our initial assumptions against each of our planned Activities.

Our key assumptions are that unless we have buy-in, resource and support from CEOs, Trustees and HR specialists, no matter how good our activities, are they will not work.

4.3 Accountability

The Board of Trustees of the Institute owns this Manifesto. With the support of the EDI Panel it will develop a strategy to deliver this Manifesto, and will make sure that the IoF has the resources it needs to deliver its key leadership role which we believe is necessary to deliver the strategy.

It will review progress against this manifesto, and the subsequent strategy, on a regular basis, based on the measurement framework we will publish.

The IoF Board of Trustees cannot, of course, guarantee that its members, or the wider fundraising community, embrace and deliver their parts of this Manifesto in order to achieve our vision of an equal, diverse and inclusive profession. We will offer them support, training and guidance, but where we believe our members are too slow to embrace the necessary changes we will not be afraid to challenge them.

We also know, that some of these initiatives and conversations will be hard, and that however hard we try, we will make mistakes. If we cause offence, we apologise. We undertake to do our best to learn from our mistakes and to avoid repeating mistakes. We believe, however, that these issues must be tackled to make the fundraising profession better in the long term.

We know that we will learn a lot on this journey, and we undertake to share our learnings along the way, for the sake of the sector, and UK society, more widely.