

**AN EQUALITY,  
DIVERSITY  
AND INCLUSION  
STRATEGY**

**FOR THE  
FUNDRAISING  
PROFESSION**

**CHANGE  
COLLECTIVE**

# ABOUT US

The Institute of Fundraising (IoF) is the professional membership body for UK fundraising. We support fundraisers through leadership and representation; best practice and compliance; education and networking; and we champion and promote fundraising as a career choice. We have over 600 organisational members who raise more than £10 billion in income for good causes every year, and around 6,000 individual members.

We are also a charity and support charities and public benefit organisations to connect donors and supporters with the causes they care passionately about.

## **Our vision is excellent fundraising for a better world.**

To deliver excellent fundraising we believe organisations need equal, diverse and inclusive workforces.

You can access our *Manifesto for Change*, our workforce survey – *Who isn't in the room?* – and a range of other resources, as well as sign up to hear more about our work on equality, diversity and inclusion on our website.

**[Institute-of-fundraising.org.uk/changecollective](https://institute-of-fundraising.org.uk/changecollective)**

Follow us on twitter **@IoFTweets**  
and be part of the **#ChangeCollective**



# DEVELOPING THE CHANGE COLLECTIVE STRATEGY



## FROM SUFINA AHMAD, CHAIR OF THE EXPERT ADVISORY PANEL

To have in one place a succinct but ambitious way forward for making the UK fundraising profession more equal, diverse and inclusive is a huge achievement. Individuals and organisations that champion this strategy are showing that they, like the Institute of Fundraising, are committed to working together to take an intersectional approach to addressing the well-known and well-evidenced inequalities that exist in the fundraising profession. This is particularly so for the under-representation of LGBT+, disabled and black, Asian and minority ethnic (BAME) fundraisers at all levels, with women under-represented in senior roles, and LGBT+ fundraisers not necessarily feeling comfortable about being themselves at work.

This strategy builds on the *Manifesto for Change* that was launched by the Institute in November 2018. It provides richer detail on the principles, activities and changes that the fundraising profession must adopt, and by when, to ensure that individuals from all backgrounds are not only recruited into the sector but retained and progressed too. It is only when this happens that we will truly achieve the Institute's vision of 'excellent fundraising for a better world'.

The Institute began considering the impact and implications of equality, diversity and inclusion within the fundraising profession in 2013, with Barrow Cadbury Trust

funded research evidencing that the profession was less diverse than the charity sector as a whole. In late 2017, the Institute returned to this piece of work, and since then the Board and entire staff team have dedicated huge amounts of their time, talent and resources to building the strongest possible foundations from which this strategy will be committed to, and delivered against within the timeframes that are set out within this strategy.

The Institute has been ably led on this journey by the Expert Panel on equality, diversity and inclusion, which was set up in February 2018, and included 19 volunteers representing different parts of the fundraising profession. It has been my privilege to Chair the Expert Panel during this time, and I have been humbled and motivated by the brutal honesty, endless optimism and unwavering commitment shown by each Panel member in pursuit of a fundraising profession where everyone is the right fit.

This strategy is ambitious, and rightly so. It will not always be an easy or simple strategy to deliver. The things that matter most and have the possibility to create lasting positive change are rarely easy or simple. Whilst the Institute is ultimately responsible for the delivery of this strategy, I hope that in time it is something that is championed by the entire fundraising profession.

Indeed, in getting to this stage we have often reached out to others externally to crowdsource ideas, receive feedback or gain the data and evidence that we need, and we have always been inspired and thrilled by the quality of the support and feedback received.

Finally, I am so pleased that there will be a dedicated EDI Committee set up within the Institute's formal governance structures with responsibility for ensuring that the strategy is delivered. I wish all those involved in its delivery the best of luck going forward and I thank Amanda Bringans, Kath Abrahams, Peter Lewis and all the staff and volunteers at the Institute for their transparency, accountability and leadership on equality, diversity and inclusion.

# OUR COMMITMENT TO AN INCLUSIVE PROFESSION



**AMANDA BRINGANS**  
**CHAIR, INSTITUTE**  
**OF FUNDRAISING**

As Chair of the Institute, I am very proud to launch the first ever Equality, Diversity and Inclusion (EDI) Strategy for the fundraising profession, developed by the Expert Panel, and fully endorsed and adopted by the IoF Board of Trustees. And I'd first like to thank Sufina and the Expert Panel for the time, expertise and commitment they have dedicated to this vital work for the fundraising community.

This strategy is a significant landmark in the history of the fundraising profession and of the Institute. We have recognised the inherent weaknesses in the profession today – a profession made up predominantly of women, but where women are not proportionately represented at senior levels, and where, even more shockingly, many have experienced sexual harassment. A profession where we know there are disproportionately few BAME fundraisers and disabled fundraisers, meaning the profession is missing out on vital talent from those communities. A profession where we know some charities are beginning to address these issues, but also one where we know many are still not.

The IoF Board is committed to addressing these inequalities over time, both within the Institute and within the wider fundraising community. Indeed, we have set out very clearly that we do not think organisations can deliver truly excellent fundraising unless they have equal, diverse and inclusive teams.

To achieve this across the profession will take time, which is why, right at the start, we have allocated a significant amount of time to getting the thinking right in developing the *Manifesto for Change* and this strategy. And we are now committed to delivering this strategy, have set up a new EDI Committee to focus on its delivery, and will allocate staff time and resource so that the Institute can play its role.

However we cannot deliver this strategy alone. We need the support of our members, individual and organisational, our corporate partners, and the corporate partners to the sector. As the strategy clearly sets out, we also need the support of the charity sector as a whole. We need the support of Trustee Boards, of CEOs, of colleagues in HR and finance, of partners in the trusts and foundations sector, to truly create an equal, diverse and inclusive profession of which we can all be proud, and which, most importantly, will be able to inspire even more supporters for the vital causes we all serve.

**WE ARE THE  
CREATIVE**



**Pictured: Johnathan Ukueku**

1.

## EXECUTIVE SUMMARY

The Institute of Fundraising believes that to deliver truly excellent fundraising, an organisation needs an equal, diverse and inclusive team.

The evidence set out in the *“Who isn’t in the room?”* report by the Institute and PwC shows that, at the moment, the fundraising community is not equal, diverse or inclusive. It also shows that while some charities are beginning to address these issues, many are still not.

This strategy sets out why the Institute believes change is needed – the business case for equality, diversity and inclusion – and then the approach that needs to be taken by the Institute, its members and partners, to address these inequalities.

While the Theory of Change underpinning this strategy focused on four key inequalities in the fundraising profession, we have also taken an intersectional approach in developing each activity, with social class treated as a cross-cutting theme.

It is clear that this is going to be a long journey and we cannot do everything at once. To date we have prioritised getting a solid understanding of the inequalities that exist. And this initial work has shown that we have more work to do to understand and address the barriers that are there, both in relation to attracting more BAME and disabled fundraisers into the profession, and in relation to enabling women to secure proportionate representation at a senior level.

At the same time, we are committed to immediate action where we can, for example through the Diversity Access Fund, to enable more people from diverse backgrounds to participate in Fundraising Convention, and co-creating both a Role Models and Affinity Network Programme. We know we need to do more work to explore and address the

specific issues for attracting more disabled people into the profession.

We also know that delivering some of our other overall strategic objectives should help us achieve the objectives set out in this strategy. For example, our move towards becoming a Chartered body, and to champion fundraising more broadly, should raise the overall positive perception of fundraising as a respected profession with a clear career pathway.

We are committed to maintaining oversight from fundraisers with lived experience and policy experts through our new formal Equality, Diversity and Inclusion Committee, which will be chaired by Carol Akiwumi. They will advise the Board and staff team on an ongoing basis, and ensure we monitor and evaluate progress, and report on it in our Annual Report every year.

The Institute is absolutely committed to driving forward this work through its own activity and leadership of the fundraising community. At the same time we cannot do this alone. The role of our members is fundamental, both in delivering within their own organisations and in supporting the work the Institute has to deliver, as are the roles of sector partners. This is something we truly need to address together in a thoughtful and determined way.

## 2.

# THE NEED FOR CHANGE

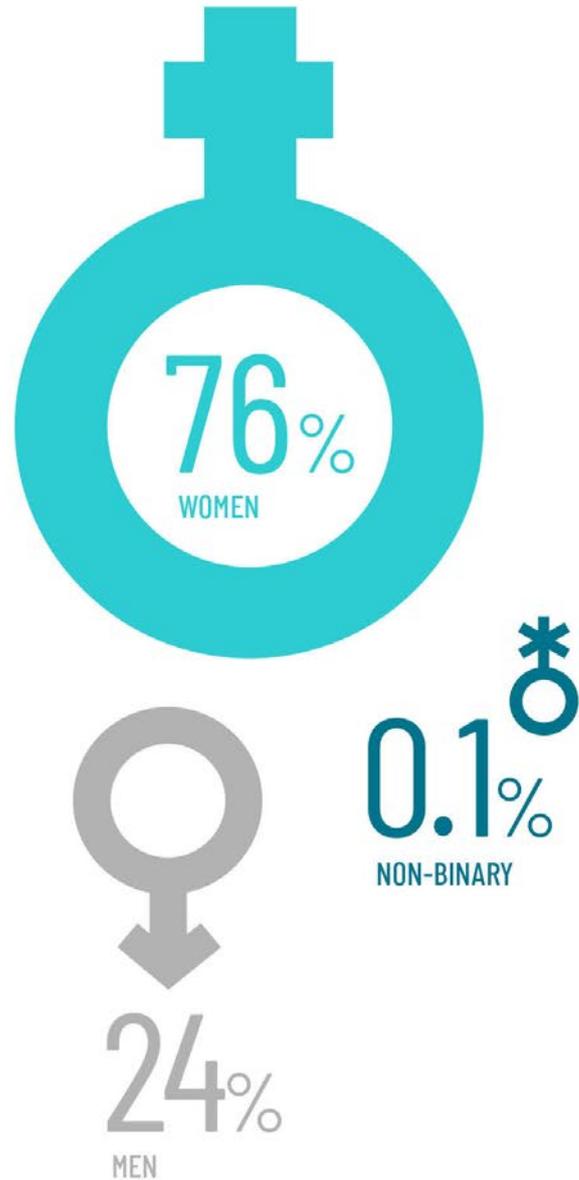
There is clear evidence of the need for this strategy. Research conducted by the IoF and the Barrow Cadbury Trust in 2013, *'Who's Doing the Asking?'*, found that the fundraising profession was less diverse than the voluntary sector workforce as a whole, which in turn, is less diverse than the UK population.

The IoF's Strategic Framework 2017-2021 drew on that report and set out a new strategic objective to create a more diverse and inclusive profession. In order to deliver that strategic objective the Board of Trustees of the Institute commissioned Elizabeth Balgobin to bring the 2013 research up to date, and on her recommendation set up the Expert Panel on Equality, Diversity and Inclusion (the Expert Panel) in February 2018 to review the evidence and develop this strategy. The members of the Panel are set out on page 36.

The Panel reviewed the evidence, undertook more detailed analysis in relation to the inequalities experienced by women, BAME fundraisers, LGBT+ fundraisers and disabled fundraisers, and developed a Theory of Change to address the issues identified. This was published as the *Manifesto for Change* in December 2018, alongside the launch of the Institute's **#ChangeCollective** campaign.

This strategy builds on that *Manifesto for Change*, supported by analysis of the existing diversity of the profession evidenced in *'Who isn't in the room?'*. It also takes into account discussions had across numerous Panel meetings at focus groups in relation to the impact of social class on equality, diversity and inclusion, as well as discussions in relation to sexual harassment in the fundraising profession.

*'Who isn't in the room?'* identifies the systemic under-representation of certain communities within the profession continues. 76% of fundraisers are women, only 9% are BAME, 3% disabled and 4% LGBT+. With only 70% of organisations having an EDI policy in place, and even fewer organisations with targets to address the inequalities that exist, there is much to do.



# 3.

## OVERARCHING APPROACH

### 3.1 OUR VISION FOR THE PROFESSION

Our vision is of an equal, diverse and inclusive profession, where everyone is the right fit. Our strategic objectives are:

- For entry into the profession to be diverse at all levels
- For progression and retention within the profession to be based on merit, and for there to be equal pay for equal work
- Fundraising is, and is acknowledged to be, an equal, diverse and inclusive profession.

This vision and set of strategic objectives will drive the activities we undertake moving forward.

### 3.2 FOUR KEY PRIORITIES TO BE ADDRESSED

The Expert Panel and the Board of Trustees of the Institute considered the evidence and agreed that four key inequalities be addressed in this strategy:

- Under-representation of BAME fundraisers
- Under-representation of disabled fundraisers
- LGBT+ fundraisers are not always able to be open in the workplace
- Women form the majority of the profession but are not proportionately represented at a senior level.

### 3.3 INTERSECTIONALITIES AND OTHER PROTECTED CHARACTERISTICS

We understand that people may experience prejudice and discrimination because of characteristics not prioritised above, including, but not limited to, the embedded characteristics protected in law (see Terminology on page 35).

So while we are prioritising the four areas set out above, we are absolutely clear that we want to create a profession where everyone is the right fit, and where the personal characteristics of everyone are properly understood and respected.

We also understand that many intersectionalities exist, and that people with more than one of the characteristics above will face greater prejudice and inequality, and even more barriers to progressing within the profession.

### 3.4 SOCIAL CLASS

The Board of Trustees and Expert Panel have agreed that this strategy should focus on addressing the inequalities set out above. However they are also acutely aware of broader discussions about the impact of an individual's social class on inequalities that exist throughout society.

Whilst the Equality Act does not place a specific duty on us to do so, we feel it is vitally important to consider socio-economic disadvantage when making strategic decisions. We are also aware of evidence that suggests that addressing

issues of class inequality and social mobility will naturally have a positive impact on inequalities in relation to race, disability, sexuality and gender. And while there is no clear evidence at this stage in relation to the fundraising profession, the Expert Panel and the Board believe that the fundraising profession is disproportionately middle class.

The approach we have therefore taken in developing this strategy, the one we will take in developing each activity set out within it, and the approach we would like our members to take, is to see addressing issues of social class as a cross-cutting theme that should be looked at in relation to each planned activity to address the four key inequalities set out above.

### **3.5 DISABILITY**

This strategy is written on the basis of the social model of disability, and therefore we refer to “disabled people” throughout. The social model of disability is a way of viewing the world, developed by disabled people which says that people are disabled by barriers in society, not by their physical or mental impairment, neurodiversity or difference. Barriers can be physical, like workplaces and buildings or they can be caused by people’s attitudes to difference, like assuming disabled people are unable to do certain things.

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

### **3.6 POSITIVE ACTION**

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

### **3.7 THEORY OF CHANGE**

The Expert Panel were clear that we needed an evidenced and methodologically sound approach to developing a strategy to make the fundraising profession more equal, diverse and inclusive, and developed a theory of change – published as our *Manifesto for Change* – to underpin the Strategy.

This Strategy develops the commitments set out in the Manifesto, puts a monitoring and evaluation framework around them, including key indicators of success along the way, identifies resources and partnerships we will need to deliver this strategy and sets out the Institute’s approach and role in taking it forward.

### **3.8 THE INSTITUTE’S ROLE**

The Institute is the professional body for the fundraising community. We have around 6,000 individual members, 600 plus organisational members and over 125 corporate supporters. We support thousands of fundraisers around the UK every year through our events, training, qualifications, guidance and resources.

We are committed to supporting the fundraising profession to become more equal, diverse and inclusive, because we believe this is essential in order to deliver our vision of excellent fundraising for a better world.

This Strategy sets out a key role for the Institute, owning this strategy, and playing a thought leader, an enabler and a catalyst for change, able to confidently challenge the fundraising profession to do better when necessary.

Our Board is ultimately responsible for our delivery of the strategy, and to support them and our staff team we have established an Equality, Diversity and Inclusion Committee, chaired by a LoF Trustee, to monitor progress, support the staff team and Board, and enable the Institute to rise to new equality, diversity and inclusion opportunities and challenges as they arise.

We know that this journey will not always be a comfortable one and no matter how hard we try we will get things wrong along the way. We also know that we cannot do this alone. We need our individual and organisational members, and our corporate supporters, to take up the challenge and take positive action to address the existing inequalities.

We also need sector leaders, partner organisations, trusts and foundations, charity trustees, chief executives, human resource professionals and recruitment agencies, amongst others, to make this a priority, and allocate the necessary resources to make change happen.

At the same time we have to embrace equality, diversity and inclusion within the Institute itself, working towards being a case study of success within our own staff team, volunteers and governance.

We are aiming for our governance at all levels – Board, Committees, National, Regional and Special Interest Group Committees – to be more reflective than their relevant populations by 2021.

We are also embracing our commitment to equality, diversity and inclusion in our service delivery, but we know we have more to do to become an exemplar of good practice. To help us on our journey we have signed up to membership of Inclusive Employers and are participating in their National Inclusion Standard assessment in 2019. It is important for us to maintain transparency and external scrutiny so we will explore wider external accreditation with other awarding bodies as we progress with our strategy.

A woman with shoulder-length grey hair and bangs, wearing a black top, stands against a solid blue background. She has a serious expression. A white speech bubble with a black border is positioned in the lower right quadrant, containing the text 'WE ARE THE OPTIMISTIC' in bold, white, uppercase letters. The speech bubble's tail points towards the right edge of the frame.

**WE ARE THE  
OPTIMISTIC**

**Pictured: Charlotte Fielder**

## 4.

# THE CASE FOR A MORE EQUAL, DIVERSE AND INCLUSIVE FUNDRAISING PROFESSION

The lack of equality, diversity and inclusion in the fundraising community reflects a familiar national picture for the majority of employment sectors, but worse.

For example, the Government's *Race Equality Audit* sets out the employment gap in terms of both overall numbers and income rates and the *Colour of Power* report is unequivocal that fewer people from BAME backgrounds make it to top jobs in any sector.

There is a growing body of evidence that workplace diversity can help the financial bottom line, with Massachusetts Institute of Technology claiming revenue increases as much as 41% and McKinsey setting out a 'diversity dividend' between 15% and 35%. According to McKinsey, "More diverse companies are better able to win top talent and improve their customer orientation, employee satisfaction, and decision-making, and all that leads to a virtuous cycle of increasing returns."

Furthermore, the spending power of the LGBT+ and BAME communities is often overlooked according to the *Financial Times* and *nfpsynergy*, with BAME communities having a disposable income over £300 billion. In order to most effectively engage with these diverse communities authentically and with integrity it is indisputably a competitive advantage to have that diversity represented within your teams.

Many faith communities also have strong traditions of philanthropy rooted in their religion, and there is an opportunity for charities to benefit from these traditions of giving if they are confident about approaching those communities in an appropriate way. A more diverse team can help in this respect, and we know, for example, that by recruiting Muslim fundraisers several large international charities were able to reach out more effectively to the Muslim community for support.

Charities should also recognise that the younger generation has a greater expectation of diversity and inclusion from employers (PwC 2011 survey of 4,000 graduates), and that the public now connects in a stronger way with disability issues, particularly since the London 2012 Paralympic Games.

We believe a greater diversity of voices within teams will make the sector and the fundraising profession stronger.

Finally, the moral case for making a change is simple – it is the right thing to do and it will help us to achieve our organisational goals.

**"Charities will miss out if they don't widen their donor profile to include young, upwardly mobile people from ethnic minority communities."**

**DEEPAK MAHTANI, TEARFUND**

# 5.

## OUR STRATEGY

### 5.1 OUR VISION AND STRATEGIC OBJECTIVES

As set out in 3.1 our vision is of an equal, diverse and inclusive profession, where everyone is the right fit. Our strategic objectives are:

- For entry into the profession to be diverse at all levels
- For progression and retention within the profession to be based on merit, and for there to be equal pay for equal work
- Fundraising is, and is acknowledged to be, an equal, diverse and inclusive profession.

These strategic objectives have informed the development of the three “Enablers” that are essential if we are going to successfully deliver the activities which in turn will deliver the changes we want to see happen.

### 5.2 THE ENABLERS

The three Enablers are absolutely vital for us to achieve our vision of an equal, diverse and inclusive profession. They underpin the successful delivery of the Activities, and it is crucial that the Institute retains a sharp focus on each of them, ensuring the buy-in not just of the fundraising community, but wider decision-makers across organisations and the sector, and ensuring that the Institute itself has the necessary resources to lead the delivery of this strategy.

#### **5.2.1 THE FUNDRAISING COMMUNITY AT ALL LEVELS BUYS-IN TO THE IMPORTANCE OF EQUALITY, DIVERSITY AND INCLUSION.**

As is set out in Section 4 we firmly believe there is an evidence-based case that more equal, more diverse and more inclusive teams will deliver better fundraising, raising more money for vital causes. We also know that, at the moment, not everyone in the fundraising community supports this view. Those who don't can either block progress, or simply not prioritise it as an issue. It is therefore vital that we win them over. That is why we have launched the #ChangeCollective, so that everyone who wants to drive this change can demonstrate their support, and access the resources they need to drive change.

From our *'Who isn't in the Room'* report of June 2019, undertaken with PwC, we know that too many organisations have not prioritised equality, diversity and inclusion. We have also been told by fundraisers and fundraising organisations who have started their diversity journey that resources and tools would help them to make a more persuasive case when asking for organisational investment. This is vitally important, as otherwise there is a real danger that our Key Activities will not be as effective as they should be. For example, we could produce a 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 then those toolkits will not be used and opportunities will be lost.

Public polling research from Yougov shows that the public, as a whole, believe that it is important that fundraisers are able to connect with supporters from different backgrounds. It also shows that there is a general positivity towards the fundraising profession, with 25% being interested in fundraising as a career. Moreover, people from currently under-represented groups are particularly driven by wanting to make a difference in their communities – a clear opportunity for the fundraising profession to engage greater talent from across the UK population.

## **5.2.2 IoF HAS THE SKILLS, RESOURCES & COMMITMENT REQUIRED TO PLAY AN IMPACTFUL LEADERSHIP ROLE ON EDI, UNAFRAID TO LEAD AND CHALLENGE**

The Institute, as the professional membership body for fundraisers and fundraising organisations, is small compared to the scale of the fundraising community as a whole, and small compared to many of its larger members, but it has a vital role to play. We own this strategy, our Board is accountable for its delivery and, we have to continue to make the case for equality, diversity and inclusion to our members, support our members and the wider fundraising community in their efforts, challenging when necessary and offering ongoing thought-leadership over the course of the strategy. But as Margaret Mead said “Never doubt that a small group of thoughtful, committed citizens can change the world. Indeed, it is the only thing that ever has.” The Institute needs to be that small group of thoughtful, committed citizens, dedicated to driving change in the fundraising community.

It needs the skills, resources and commitment to deliver this strategy. This commitment is set out in the *Manifesto for Change* and this strategy, and embedded as a strategic objective in the Institute’s own strategy. The Board of Trustees has also established a formal Equality, Diversity and Inclusion Committee, to oversee delivery of this strategy moving forward.

The Board has already allocated core funding to this work, including employing an EDI Project Manager, and has tasked the staff team with securing external funding to enable delivery of the strategy. It is crucial that the Institute secures such funding and partnerships for this strategy to be a success.

## **5.2.3 TRUSTEES, CHIEF EXECUTIVES AND HUMAN RESOURCE PROFESSIONALS EMBRACE THE IMPORTANCE OF EDI BOTH WITHIN THEMSELVES AND WITHIN THEIR FUNDRAISING TEAMS**

There are some initiatives and activities that the IoF and the fundraising community can drive forward on our own. However, a consistent message has been that trustees, CEOs and HR teams need to be both diverse amongst themselves and be supportive of efforts to diversify their fundraising teams.

In order to drive change the leadership role of trustees and chief executives is key. The evidence we have gathered shows that fundraisers and prospective fundraisers want to see equality, diversity and inclusion embedded within organisation’s plans and also evidenced in the reality of their teams, especially looking for role models like them in their senior teams, including Trustees.

In order to effectively deliver this strategy the IoF needs Trustees, CEOs and HR specialists to embrace the importance of equality, diversity and inclusion, and support the essential activities within this strategy.

Many organisations currently recruit the same type of fundraisers from the same sources or pools of people. At a practical level they will need to direct recruitment spend or sign off extra expenditure in order to reach out to enable more diverse recruitment, or invest in targeted training and development. HR teams may need extra resources in terms of time and cost in order to provide a greater diversity of candidates to shortlist.

On the positive side we have seen some strong early leadership on the issue from some Trustees, CEOs, charity HR Directors and recruitment agencies. For example, at ActionAid and Barnardo’s, equality, diversity and inclusion is fully embedded into their organisational strategies.

We were delighted to work with ACEVO on our joint report on Racial Diversity in the charity sector, and we see this as a starting point for future joint activity. The Charity HR Network and TPP recruitment supported our YouGov survey on attitudes to a career in fundraising. Green Park, an executive recruitment agency committed to work in this area, has been holding roundtables with senior sector figures to work out what can and should be done to address the current lack of diversity amongst CEOs and Trustees.



**WE ARE  
THE FACE  
OF CHANGE**

Pictured: Joyce Fraser

## 6.

# KEY ACTIVITIES & PRIORITIES

The Expert Panel and Board agreed 16 Key Activities to deliver our vision of an equal, diverse and inclusive profession. These are each set out under the most relevant strategic objective, although we recognise that in practice some of the activities will also deliver more broadly against our other strategic objectives.

It is important to note that we cannot deliver everything at the same time, so we have set out an indicative timeframe for each activity, breaking it down into component parts as necessary.

In developing each activity we will also consider intersectionality and class.

We have set out our overarching approach to monitoring and evaluating progress in section 7 below, but where there are significant milestones or indicators against an individual Activity we have noted them.

## PRIORITIES FOR THE FIRST 18 MONTHS

During the first 18 months of delivering this new strategy we have identified a range of key priorities designed to help shift our fundraising sector to where we want it to be. We would welcome the opportunity to discuss each of these activities with our members, the wider fundraising community and the sector as a whole.

By March 2021 we will have:

- Delivered ongoing EDI training for IoF staff, trustees and volunteers
- Reviewed the accessibility and inclusion in the delivery of our services, IoF conferences, events and training, including Fundraising Convention
- Commissioned research specifically on the under-representation of BAME fundraisers in the profession, including on the barriers to entry and progression
- Commissioned research on women into leadership in fundraising
- Delivered an EDI Recruitment Toolkit to help organisations recruit more BAME, disabled and male fundraisers
- Engaged with disabled fundraisers and disabled peoples' organisations to identify what specific actions we could take to support more disabled people into fundraising
- Co-created our approach to Affinity Networks and Role Models for BAME, disabled and LGBT+ fundraisers
- Developed our Diversity Access Fund to enable more BAME, disabled and LGBT+ fundraisers to engage with the full range of our events, training and qualifications
- Published an exemplar Flexible Working Policy
- Continued to engage with partner organisations to discuss and deliver a coordinated cross-sector approach to EDI
- Launched an EDI Pledge at Fundraising Convention 2020
- Gauged interest in a sector-wide initiative to promote the fundraising profession to educational establishments

## ENTRY INTO THE PROFESSION

### 6.1 RECRUITMENT TOOLKIT & TRAINING DEVELOPED AND AVAILABLE

#### **FOCUS: INCREASING THE RECRUITMENT OF BAME AND DISABLED FUNDRAISERS**

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 shown clearly in our *'Who isn't in the room?'* research which shows people continue to use their existing networks to recruit staff. The result is a profession which is under-representative of BAME and disabled fundraisers.

#### **ACTIONS:**

We will reach out to charities, recruitment agencies and other partners to form a working group or groups to develop a recruitment toolkit and training for use by members. The toolkit will focus on how to get a greater diversity of people into the profession, with a specific priority to recruit more BAME, disabled and male fundraisers.

#### **WHEN:**

We regard this as a key priority as it underpins and helps us to meet a number of other Key Activities outlined in this strategy document. This work will begin in summer 2019 and we will launch the toolkit in the spring of 2020.

#### **MEASURES OF SUCCESS:**

- Launch of toolkit spring 2020.
- Number of organisations using toolkit – targets to be set based once toolkit is developed.
- Number of organisations reporting specific activity to diversify their workforce grows 5% per year on year against *'Who isn't in the room?'* baseline.

## ENTRY INTO THE PROFESSION

### 6.2 EDI PLEDGE

#### **FOCUS: IT WILL COVER ALL ASPECTS OF EQUALITY, DIVERSITY AND INCLUSION**

As an incentive for organisations to embrace equality, diversity and inclusion we will develop a Pledge 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 what commitments are set out in the Pledge, but it could include, for example, a commitment to have an EDI policy in place, a commitment to have EDI targets, a commitment not to use unpaid interns, a commitment to build more diverse fundraising teams, a commitment to address any gender inequality in fundraising teams.

#### **ACTION:**

- Using insight from our *'Who isn't in the room?'* report we will work with members to develop an EDI Pledge that provides a key tool for change. Within the Pledge we expect to require members to provide transparent reporting, sharing success, failure, best practice and case studies.
- We will challenge members where we believe more can be done.

#### **WHEN:**

We will launch the EDI Pledge at Convention in 2020.

#### **MEASURES OF SUCCESS:**

- Number of members who sign up to the Pledge – target to be set once Pledge finalised.
- Identified changes as a result of the Pledge – target to be set once Pledge finalised. For example, number of organisations ceasing to have unpaid internships; number of organisations having targets in relation to number of BAME or disabled fundraisers.
- Evidence that the Pledge is increasing the percentage of charities having and implementing policies as against baseline in *'Who isn't in the room?'*.

## ENTRY INTO THE PROFESSION

### 6.3 POWERFUL CAMPAIGN TO CELEBRATE FUNDRAISING AS A CAREER OF CHOICE

#### **FOCUS: INCREASING THE RECRUITMENT OF BAME AND DISABLED FUNDRAISERS**

The IoF already has a strategic objective to make fundraising a respected career, and public polling research with YouGov suggests this is a key driver particularly for people from BAME backgrounds considering which profession to enter. The Institute is also on a journey to become a Chartered Institute, and the Expert Panel believe this will greatly enhance the appeal of fundraising as a career of choice provided the profession is seen to be an inclusive one. A third of BAME respondents in YouGov's research agreed that Chartered status would lead to a more positive impression of fundraising as a career. This activity will need to be linked to the work on roles models and outreach to educational establishments.

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.

#### **ACTION:**

We make inclusion a key theme of our petition to become a Chartered body, a key theme in the development of our new identity and in our future work to promote fundraising as a career of choice.

#### **WHEN:**

- April 2019 – Inclusion is a key theme in our petition to become a Chartered body and in the development of our new identity.
- September 2019 – We engage with our members, educational establishments, the National Union of Students, the National Association of Student Fundraisers, The Careers Service and others to develop a campaign to promote fundraising as a career of choice.

#### **MEASURE OF SUCCESS:**

- Autumn 2019 we will publish insight into perceptions of fundraising as a career based on YouGov public polling.

## ENTRY INTO THE PROFESSION

### 6.4 PROACTIVE APPROACH TO ENABLING MORE DISABLED PEOPLE TO BECOME FUNDRAISERS

#### **FOCUS: RECRUITING MORE DISABLED PEOPLE INTO THE PROFESSION**

The low overall employment rate for disabled people is a society wide issue, but it is one that we should be committed to addressing within the fundraising community. The first step is to work with disabled fundraisers, disability focused organisations and disability experts to better understand what the specific barriers might be and what we could do about them.

#### **ACTIONS:**

- The Institute will reach out to disabled fundraisers and wider group of disability focused and disabled-led charities – Sue Ryder, Leonard Cheshire, Action on Hearing Loss, Scope, RNIB, the Back Up Trust, Inclusion London, and Reclaiming Our Futures Alliance – to agree positive approaches to engaging disabled people into the profession. The Institute will also research the Disability Confident Programme and trusts and foundations developing work to support disabled people. We will develop specific and inclusive programmes to engage disabled people in fundraising.
- We will develop our approach to making sure all our conferences, training and events are inclusive.

#### **WHEN:**

- We will engage disabled fundraisers and a wider range of disabled peoples' organisations/charities in 2019–20 with a view to identifying what specific actions we can take to support more disabled people into the fundraising profession.
- We will review the accessibility of our training, events and conferences by July 2020.

#### **MEASURE OF SUCCESS:**

A new initiative specifically designed to increase the number of disabled people working as fundraisers is launched no later than autumn 2020.



**WE ARE THE  
INNOVATIVE**

Pictured: Polly Shute

## ENTRY INTO THE PROFESSION

### 6.5 RESEARCH ON THE GENDER IMBALANCE IN FUNDRAISING WITH A VIEW TO ATTRACTING MORE MEN INTO FUNDRAISING

#### FOCUS: IMPROVING THE GENDER BALANCE OF THE PROFESSION

The data shows that the vast majority of fundraisers are women, with currently fewer than 25% of fundraisers being men. The Expert 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 how to attract more men into fundraising. Interestingly, when asked how proud they would feel of working in the charity sector in the YouGov survey, women were more positive than men (65% agreeing compared to only 49% of men).

#### ACTIONS:

- We will undertake research to gain a better understanding of the underlying issues in the sector. Based on the outcomes of the research, we will develop initiatives/campaigns to attract more men into the profession. We will develop positive PR and marketing ensuring men are better represented/profiled within the profession. We will reflect this Key Activity when developing our recruitment toolkit.
- It is important to note that while we aim to get a better gender balance across the profession as a whole, we want this to complement our objective that women should progress proportionately within the profession.

#### WHEN:

- Develop further research on this issue based on YouGov research during 2020.
- In spring 2020 we will develop a research proposal to look at why so few men are attracted into the fundraising profession.

#### MEASURES OF SUCCESS:

- Based on the insight we will develop and launch an initiative designed to address this imbalance by spring 2021.

## ENTRY INTO THE PROFESSION

### 6.6 RESEARCH IN MORE DEPTH WHY THERE ARE SO FEW BAME FUNDRAISERS

#### FOCUS: RECRUITING MORE BAME FUNDRAISERS INTO THE PROFESSION

The EDI Panel had initially thought that the under-representation of BAME fundraisers in the profession was simply a reflection of systemic inequalities in society, and that the right approach was to embed proactive approaches to recruiting and retaining BAME fundraisers across all other activities. However, further insight and reflection suggests that we need to do further research into the specific barriers to entry and progression within the profession for BAME people.

Public polling research from YouGov suggests salary levels and career development are more important to BAME respondents to their survey, and we need to understand this further. For example, we might want to do more research to better understand whether actual salary levels in the charity sector present a barrier, or whether it is the perception that those salaries are low. The YouGov data suggests 32% of respondents were not interested in a career in fundraising compared to only 24% of the population as a whole. BAME respondents were also more likely to think you were paid less in charity jobs than in other professions.

At the same time, working for something that they are passionate about, working for an ethical organisation and making a difference in society seem to be more important to BAME respondents, which you we would expect to lead to more

BAME people working in the charity sector. This may be linked to the higher levels of volunteerism in BAME communities, with Black adults being more likely to formally volunteer than other ethnic groups according to the **Government's Race Disparity Audit (See section 3.10)**.

Fundraising as a profession is also seen more positively by respondents than their Asian counterparts. BAME respondents are also less likely to think that fundraising would have a professional body compared to their White counterparts, perhaps suggesting it is seen more as a volunteer activity that would not need a professional body.

**ACTION:**

We will commission more detailed research in relation to the perception of fundraising as a career within BAME communities, to better understand the barriers and what we might do to address them.

**WHEN:**

In 2019 we will develop a research brief and seek funding for this work.

**MEASURE OF SUCCESS:**

Our research published in summer 2020 will provide provides key insight into attracting and keeping more BAME fundraisers into the profession, and we use that insight to inform our programmes.

**ENTRY INTO THE PROFESSION**

## 6.7 ESTABLISH OUTREACH TO EDUCATIONAL ESTABLISHMENTS FOCUSED ON ENGAGING DIVERSE STUDENTS

**FOCUS: RECRUITING MORE BAME AND DISABLED FUNDRAISERS INTO THE PROFESSION**

The general consensus from the evidence we have collected is that most current fundraisers have “fallen into” fundraising, rather than specifically chosen it as a career, and that even now very few people proactively consider or choose fundraising as a career. Public polling research with YouGov supports this, but also shows an opportunity in that a quarter of people generally look upon fundraising as a potentially attractive career, and that achieving chartered status will make the profession more attractive as a career of choice.

**ACTIONS:**

- We will continue to pursue our objective to become a Chartered Institute.
- Using the evidence from the YouGov survey we will seek members’ views on the concept of a fundraising community-wide approach to outreach to educational establishments, as part of a wider programme to promote fundraising as a career of choice for a diverse range of people. Amongst other issues to be considered we will review the potential for outreach by role models; the advantages and disadvantages of regional or national approaches; and what support might be offered to enable individual charities to reach out to educational establishments in their respective localities.

**WHEN:**

- With our members’ consent, we will submit a formal petition to become a Chartered body in July 2019.
- In spring 2020 we will begin conversations with our members and key stakeholders in relation to the best way or ways to encourage people to consider fundraising as a deliberate career choice.

**MEASURE OF SUCCESS:**

Based on member feedback, in 2021 we will develop a new initiative designed to proactively encourage more BAME and disabled people, and more men, to consider a career in fundraising.



**WE ARE THE NEW  
REPRESENTATIVES**

Pictured: Harpreet Kondel

## PROGRESSION WITHIN THE PROFESSION

### 6.8 ESTABLISH AND SUPPORT AFFINITY NETWORKS, AND ENCOURAGE LARGER MEMBERS TO HAVE AFFINITY NETWORKS

#### FOCUS: EQUAL PROGRESSION FOR BAME, DISABLED, LGBT+ AND WOMEN FUNDRAISERS

Under-represented communities need to be able to meet “people like them”, so they can share experiences, find solidarity through community and express collective views to relevant people or groups. We already have Black Fundraisers UK and Fundraisers in Christian Organisations as Special Interest Groups within the Institute, and some of our larger members also already have internal affinity groups.

We are committed to co-creating these networks with the fundraising community ensuring that BAME, disabled and LGBT+ fundraisers (and fundraisers from other communities) have advocacy and support networks within the Institute and the fundraising community.

#### ACTIONS:

- We will co-create our approach to Affinity Networks with BAME, LGBT+, disabled and women fundraisers.
- We will work with our larger members to research and develop and support impactful affinity networks within them.
- We will share insight and knowledge between different affinity groups and create and support new Affinity Groups as the co-creation exercise suggests.

#### WHEN:

In July 2019 we will stage our first event looking to co-create our approach to affinity networks. In 2019–20 we will research the extent of affinity networks that exist within our organisational members, and discuss opportunities to bring them together to share learning.

#### MEASURES OF SUCCESS:

- We will review the success of the co-creation event in summer 2019.
- We will develop the implementation of the agreed deliverables from the co-creation event in autumn 2019
- We will review the number and impact of affinity networks and role models across the sector in 2021.

## PROGRESSION WITHIN THE PROFESSION

### 6.9 ACCESS FUND ESTABLISHED TO ENABLE A GREATER DIVERSITY OF FUNDRAISERS TO TAKE PART IN CONFERENCES, TRAINING AND QUALIFICATIONS

#### FOCUS: SUPPORT THE PROGRESSION OF BAME, DISABLED AND LGBT+ FUNDRAISERS

We established our Diversity Access Fund and ran our first two campaigns “Fundraising Convention is for Everyone” in spring 2018 and 2019, raising £30,000 for bursaries including £10k from the IoF. And this funded travel, accommodation and passes for 48 fundraisers from BAME, disabled and LGBT+ backgrounds. We want to grow this fund to support more people to attend and contribute to all of our events, training and qualifications.

#### ACTION:

- We will grow the Access Fund in 2020 to enable more people to contribute to Fundraising Convention.
- We will develop the Access Fund to cover other conferences, training and qualifications.
- We will engage our National, Regional and Special Interest Groups in the Access Fund.

**WHEN:**

- During 2019–20 we will learn the lessons from our first two appeals and bursary programmes, and develop our strategic approach for our Access Fund moving forward, including working with our National, Regional and Special Interest Groups.
- We will increase year on year the number of people able to contribute to Fundraising Convention through the Access Fund.

**MEASURES OF SUCCESS:**

- We will increase the size of the Access Fund by 5% each year from the baseline of July 2019.
- We will increase the number of applications and bursaries offered to all of our conferences, events, qualifications and training by 5% each year from the baseline of 2019.
- We will review feedback from bursary recipients on the success of the programme each year.

**PROGRESSION WITHIN THE PROFESSION****6.10 WOMEN INTO LEADERSHIP PROGRAMME RESEARCHED AND DEVELOPED TO ENSURE WOMEN REPRESENTED PROPORTIONATELY AT SENIOR LEVELS****FOCUS: EQUAL PROGRESSION FOR WOMEN FUNDRAISERS WITHIN THE PROFESSION**

Women make up 76% of the profession but this is not matched at senior level, and issues of gender discrimination remain. There is also a gender pay gap of roughly 10%. Women are clear that more research is necessary to understand the underlying causes of this, but are also clear that specific policies can help, such as ensuring there are flexible working practices and that these are well promoted both within and outside organisations.

**ACTION:**

- We will undertake research to better understand the underlying issues which we and the sector can then work to specifically address.
- Based on the findings in the research we will work with women in the fundraising community to develop the right support and activities to ensure women are proportionately represented at a senior level. We will encourage all fundraising organisations to monitor their gender pay gap and address any inequalities.

**WHEN:**

- We will finalise a research brief on women in fundraising by August 2019.
- By September 2019, we will secure funding for the research project and aim to publish the research in early 2020.
- In 2020, based on this research we will scope and develop a programme or programmes to support the leadership development of women in fundraising.

**MEASURES OF SUCCESS:**

- We will deliver the report on women in fundraising by spring 2020.
- We will develop new initiatives to support women in fundraising by September 2020.

## PROGRESSION WITHIN THE PROFESSION

### 6.11 ENCOURAGE PROACTIVELY COMMUNICATED FLEXIBLE WORKING POLICIES

#### FOCUS: TO SUPPORT THE PROGRESSION OF WOMEN AND DISABLED FUNDRAISERS

Flexible working policies are particularly important to enable disabled people to fully engage in the workplace, and also for women/men to manage childcare and other responsibilities. People are clear that flexible working is just as important for men as women, so that men as well as women can take on caring responsibilities. For example, having paid paternity/parental/secondary carer leave that equates to that which is on offer to mothers.

Although *'Who isn't in the room?'* suggests a high percentage of organisations have policies, we understand anecdotally that these vary significantly in their content and may be inconsistently implemented.

#### ACTION:

- We will develop and maintain a recommended flexible working policy.
- We will publicise more widely the importance of flexible working and ensure flexible working practices are better profiled in the sector's recruitment process and encourage more consistent implementation.

#### WHEN:

In 2019 we will develop an exemplar flexible working policy for our members to consult on and adopt.

#### MEASURE OF SUCCESS:

Numbers of organisations adopting our flexible working policy increases 5% year-on-year from 2019 baseline.

## INCLUSION

### 6.12 POWERFUL BUSINESS, MORAL AND EMOTIONAL CAMPAIGN FOR EDI

#### FOCUS: ALL ASPECTS OF EQUALITY, DIVERSITY AND INCLUSION

Sadly, we believe the case for EDI still needs to be accepted by many in the sector. This means action is still required to continue to make the business and moral case for EDI, and to raise EDI awareness within the profession. This is absolutely vital as unless the fundraisers and the wider charity sector embrace the need for greater equality, diversity and inclusion it is unlikely that the other Key Activities will be undertaken by our members.

#### ACTION:

- We will agree a final, compelling case for making the profession more equal, diverse and inclusive.
- We will tailor the case to different audiences, including senior fundraisers, CEOs, Trustees, funders, HR professionals.
- We will develop a campaign and undertake appropriate engagements with IoF members to make the case for diversity (e.g. through Director's Networks, Strategy Forum, conferences & events). We will create and disseminate appropriate blogs, case studies and research reports which support the case for EDI.
- We will build the case for equality, diversity and inclusion into all of our training and qualifications.

#### WHEN:

- In 2019 we will conduct a survey of IoF organisational and individual members to assess the current diversity of their fundraising teams.
- In 2019 we will commission an external academic review of all the research on the business case for diversity, with a specific focus on business activities similar to fundraising such as marketing.
- In 2020 we will develop a campaign based on the insight we gain, and promote the appropriate messages to the fundraising community and the wider sector.

#### MEASURE OF SUCCESS:

We will increase the number of organisations with EDI policies and targets by 5% each year from the *'Who isn't in the room?'* baseline of 2019.

**INCLUSION**

**6.13 ROLE MODEL/AMBASSADOR PROGRAMME DEVELOPED AND ROLLED OUT OF DIVERSE FUNDRAISERS, CEOS AND TRUSTEES**

**FOCUS: SUPPORTING BAME, DISABLED, LGBT+ AND WOMEN FUNDRAISERS**

Role models or ambassadors are important in a sector or an individual organisation as people want to see ‘people like them’ in the career or organisation they are considering or working at already, especially in more senior roles. Role models also need to be happy to be open about their specific characteristics if they are not visible.

**ACTION:**

We will co-create a role model programme in July 2019, and roll out a programme based on that co-creation.

**WHEN:**

We will co-create this programme in 2019 with fundraisers from diverse backgrounds.

**MEASURE OF SUCCESS:**

Role model programme will be developed and rolled out in 2020.

**INCLUSION**

**6.14 IoF EMBEDS EDI WITHIN ITS STAFF TEAMS, GOVERNANCE AND PROGRAMMES, INCLUDING FUNDRAISING CONVENTION**

**FOCUS: ALL ASPECTS OF EQUALITY, DIVERSITY AND INCLUSION**

The IoF has a clear leadership role to play within the fundraising community, and as such needs to ensure that it embraces EDI within its own activities 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. It also needs the resources to deliver that leadership role.

**ACTIONS:**

Governance and capacity – The Board of Trustees has set targets for the diversity of the Trustee Board itself that of its Committees, and Membership Communities Committees, its staff team and volunteers. The target is that by 2021 our Board and all our Committees will be more diverse than the general population of the part of the UK that they serve. Service delivery – We will work to make sure ensure that all of our service delivery embraces equality, diversity and inclusion. There are several aspects to this.

Firstly we must make sure that the content of all of our service delivery embraces equality, diversity and inclusion. This is different for each aspect of our service delivery but includes:

- Ensuring we have a diverse set of speakers at every conference and event
- Ensuring we have a diverse group of trainers and faculty for our training and qualifications
- Ensuring our reports and publications are inclusive, with a diverse range of case studies and examples
- Ensuring we include content on the benefits of embracing equality diversity and inclusion across all of our services

Secondly we have to increase the diversity of people engaging with the Institute whether through membership or as delegates to our events. In order to do this we will put in place monitoring systems to report against the diversity of people attending all of our events, training and qualifications. We will also monitor the diversity of our membership.

The EDI Panel have been clear that equality, diversity and inclusion is a key priority within Fundraising Convention, our flagship annual event.

We will focus on delivering a safe and inclusive space for fundraisers to engage, secure a diverse range of speakers, a more diverse group of delegates, as well as sessions supporting the sector on its EDI journey.

We will focus on creating safe and inclusive environment, free of sexual harassment in order to create a truly equal, diverse and inclusive profession everyone needs to feel safe, and not be subject to harassment of any kind.

In response to concerns about systemic sexual harassment within the fundraising profession the IoF Board has set up a Task Group to address sexual harassment in fundraising. Chaired by two Trustees the Task Group will review and update all the guidance to our members to ensure a robust sector-wide approach to tackling sexual harassment, as well as reviewing our own complaints policies and procedures.

#### **WHEN:**

- In 2019 the IoF will establish a baseline of the diversity of its staff team, and our Board, Committees and Group Committees.
- In 2019 we will aim to achieve at least Foundation Level through Inclusive Employers' National Inclusion Standard.
- We will ensure that all of our Trustees, staff and volunteers are trained in aspects of EDI and that an ongoing programme of training is put in place.
- We will establish a baseline for the diversity of delegates to our conferences, training and events.
- Over the course of 2019 we will engage with our National, Regional and Special Interest Groups to co-create plans to increase the diversity of their Committees.
- We will commission academic content on the benefits of equality, diversity and inclusion for inclusion in our qualifications and training programmes.
- In 2020 we will aim to achieve at least Bronze Level through Inclusive Employers' National Inclusion Standard
- We will establish a formal EDI Committee to oversee our work and progress on delivering against this strategy.

#### **MEASURES OF SUCCESS:**

- Achieve at least Foundation Level through Inclusive Employer's National Inclusion Standard.
- Achieve at least Bronze Level through Inclusive Employers' National Inclusion Standard.
- The diversity of IoF staff team will more than match UK diversity by 2021.
- We will reduce and publish our gender pay gap year on year from 2019 base.
- The diversity of the IoF Board, Committees & Group Committees will more than match diversity of relevant demographic areas by 2021.
- Tutors will be properly briefed so that all Academy courses will include EDI content by September 2019.



**WE ARE  
THE UNITED**

**Pictured: Sam Butler**

## INCLUSION

### 6.15 ENCOURAGE, SUPPORT AND CHALLENGE OTHERS TO DRIVE FORWARD EDI AS A PRIORITY AMONGST CEOS & TRUSTEES & THE CHARITY WORKFORCE MORE BROADLY

#### FOCUS: ALL ASPECTS OF EQUALITY, DIVERSITY AND INCLUSION

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

#### ACTIONS:

We will work with a range of partner organisations to drive forward equality, diversity and inclusion across the charity sector as a whole, including with ACEVO, NCVO, ACF, the Charities HR Network, CASE Europe, the Charity Commission, and NPC.

#### WHEN:

In 2019-20 we will engage with government, ACEVO, NCVO, NPC, Charity Commission, ACF and others to progress a more coordinated sector-wide approach to encouraging organisations to engage with EDI at a sector-wide level.

#### MEASURE OF SUCCESS:

We will be involved in at least one sector-wide partnership each year to drive forward the EDI agenda at a strategic level with HR directors, CEOs and Trustee Boards.

## INCLUSION

### 6.16 DEVELOP AND CHAMPION CASE STUDIES OF SUCCESS IN RELATION TO DIVERSE AND INCLUSIVE TEAMS

#### FOCUS: BAME, DISABLED, LGBT+ AND WOMEN FUNDRAISERS

We need to secure buy-in from Trustees, CEOs, HR professionals and the fundraising community itself to drive forward the whole range of activities within this strategy. In order to secure that support we will research and publish case studies of success in relation to EDI so that people can see the benefits through the success of other organisations.

#### ACTIONS:

- We will establish a dedicated programme for gathering examples of best practice and case studies of success from within the fundraising community. We will establish systems for sharing best practice and case studies gathered from all sectors across the UK and internationally.
- We will introduce a new #ChangeCollective Award to celebrate action on EDI as part of our National Awards in 2019.

#### WHEN:

- Every year, as part of our National Fundraising Awards we will have a #ChangeCollective Award for the organisation who has achieved the most through embracing EDI.
- We will have a programme of work communicating case studies of success each year in a variety of ways through social media, events and newsletters.

#### MEASURES OF SUCCESS:

- We will have more applications each year for our #ChangeCollective Award compared to 2019 base.
- We will publish at least four powerful case studies of success each year.

# 7.

## MEASUREMENT AND ACCOUNTABILITY

### ACCOUNTABILITY

#### 7.1 THE IoF BOARD IS ACCOUNTABLE FOR THE DELIVERY OF THIS STRATEGY, AND HAS SET UP A SPECIFIC EQUALITY, DIVERSITY AND INCLUSION COMMITTEE TO SUPPORT IT.

We will report against this strategy in every Annual Report and accounts and publish a specific tri-annual update on progress in delivering this strategy.

Under the leadership of our EDI Committee we will make every effort to ensure IoF has the resources and expert advice it needs to deliver against this strategy and the commitments set out in it.

The IoF Board of Trustees cannot, of course, guarantee that its members, or the wider fundraising community, embrace and deliver against this strategy 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 aren't embracing 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 them. We believe however that these issues must be tackled to make the fundraising profession better in the longer term.

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

#### 7.2 MEASUREMENT FRAMEWORK

- We will use the measurement framework set out below to track progress against this strategy.
- Ahead of finalising this strategy we published baseline data of the diversity of the fundraising community compared to the diversity of the UK population as a whole, based on our *'Who isn't in the room?'* research.
- We will publish the diversity of the IoF staff team, our trustees, committee members and volunteers.
- We will repeat these surveys and the publication of this data every three years to monitor progress.
- We will also collect and monitor the diversity of our membership and the fundraisers who attend our conferences, training and qualifications.

**WE ARE  
THE FRESH  
PERSPECTIVE**



**Pictured: Jonathan Levy**

# MANIFESTO FOR CHANGE

## EVALUATION FRAMEWORK

DESIRED OUTCOMES	ENTRY INTO THE PROFESSION IS DIVERSE AT ALL LEVELS	PROGRESSION AND RETENTION WITHIN THE PROFESSION IS BASED ON MERIT	FUNDRAISING IS, AND IS ACKNOWLEDGED TO BE, AN INCLUSIVE PROFESSION
<b>INDICATORS</b>	<ul style="list-style-type: none"> <li>Percentage of fundraisers who identify as BAME, LGBT+, disabled and/or women</li> <li>Percentage of IoF membership who identify as BAME, LGBT+, disabled and/or women</li> <li>Number of members of IoF affinity networks for diverse groups</li> <li>Number of applications for IoF Access Fund bursaries</li> <li>Number of organisations committed to paid fundraising internships</li> <li>Number of EDI Charter organisations committed to and report on fair recruitment practices</li> <li>Feedback from IoF members that entry into the profession is more diverse</li> </ul>	<ul style="list-style-type: none"> <li>Percentage of IoF members of over three years who identify as BAME, LGBT+ and/or disabled</li> <li>Number of EDI role models</li> <li>Percentage of speakers/trainers at IoF events who identify as BAME, LGBT+ and/or disabled</li> <li>Percentage of women at senior levels in fundraising</li> <li>Number of EDI Charter organisations committed to and report on flexible working policies</li> <li>Feedback from IoF members that progress and retention within the profession is based on merit</li> </ul>	<ul style="list-style-type: none"> <li>Percentage of fundraisers who identify as BAME, LGBT+, disabled and/or women is reflective of UK society</li> <li>Percentage of IoF membership who identify as BAME, LGBT+, disabled and/or women is reflective of UK society</li> <li>Number of organisations signed up to and reporting on the EDI Charter</li> <li>Number of organisational members which have EDI leads</li> <li>Affinity networks play an active role in supporting fundraisers from diverse backgrounds</li> <li>Downloads of EDI resources and case studies</li> <li>Feedback from IoF members that fundraising is an inclusive profession</li> <li>Feedback from stakeholders that fundraising is an inclusive profession</li> </ul>
<b>MEASUREMENT TOOLS</b>	<ul style="list-style-type: none"> <li>Survey data</li> <li>Membership EDI data</li> <li>EDI Charter data on diversity of fundraising staff</li> <li>Access Fund bursary application data</li> <li>Case Studies</li> </ul>	<ul style="list-style-type: none"> <li>Survey data</li> <li>Membership EDI data</li> <li>Perceptions survey</li> <li>EDI Charter data on diversity of fundraising staff and leadership</li> <li>Access Fund bursary application data</li> </ul>	<ul style="list-style-type: none"> <li>Delegate EDI data</li> <li>Membership EDI data</li> <li>EDI Charter sign-ups</li> <li>Affinity networks membership data</li> <li>Downloads of EDI resources and case studies</li> </ul>

**8.**

## **RESOURCES**

The Institute is committed to playing its key leadership role in delivering this strategy, and will allocate core resources towards delivering this strategy each year. We expect the resources we dedicate to this work to grow over time.

However some initiatives will need external support and funding, either from our members or partner organisations including government and trusts and foundations. That means that part of our core work in delivering this strategy will be to secure resources to play our role and a key priority each year for the duration of this strategy for our own fundraising initiatives will be to deliver support for this strategy.

But it is not just about the Institute's own resources. Every fundraising organisation across the UK needs to dedicate resources to EDI to make this happen. That should absolutely comprise some of their core resources, but they too may need support from partners and funders to deliver the changes outlined in this strategy.

Finally, our partner sector bodies who work with chief executives, HR professionals, finance professionals and trustees are also crucial. To optimise our impact we need them to allocate their own resources to it, so that we can take forward this area of work together.

**9.**

## **CONCLUSION**

The data set out in *'Who isn't in the room?'* shows the lack of equality, diversity and inclusion within the fundraising profession.

This strategy, developed by the Expert Panel based on a theory of change, and endorsed by the IoF Board, sets out our vision and objectives, the challenges that exist and our commitment to tackle them and the activities we will undertake to achieve an equal, diverse and inclusive profession. It also sets out an overarching measurement framework.

We, at the Institute, are committed to leading the changes set out in this strategy, but we need the support of our members and partners to achieve our vision of an equal, diverse and inclusive profession. We hope this strategy inspires you all to work with us on this journey.

# 10.

## TERMINOLOGY

### 10.1 PROTECTED CHARACTERISTICS:

When we refer to protected groups or protected characteristics, we are referencing the nine Protected Characteristics defined under Types of Discrimination in the Equality Act 2010; these are:

- age
- gender reassignment
- being married or in a civil partnership
- being pregnant or on maternity leave
- disability
- race including colour, nationality, ethnic or national origin
- religion or belief
- sex
- sexual orientation

### 10.2 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.

### 10.3 BAME:

This refers to all people from Black, Asian and Minority Ethnic backgrounds.

### 10.4 REFERENCES TO RESEARCH:

Where we reference findings from YouGov research this comes from fieldwork undertaken between 29th April and 8th May 2019. The survey was carried out online with a sample size of 2,623 adults. The figures have been weighted and are representative of UK adults (aged 16-64). The full results will be published in Autumn 2019.

# ACKNOWLEDGEMENTS

We would like to thank everyone who worked with us to develop this strategy. We owe a particular gratitude to the members of our Expert Advisory Panel for their advice, guidance and commitment.

## **EXPERT ADVISORY PANEL**

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**Sufina Ahmad (Chair)**, City of London Corporation

**Anthony Wilkes**, Cancer Research UK & UKIED

**Alex Gwynne**, Stonewall

**Carol Akiwumi**, IoF Trustee

**Charlotte Fielder MBE**, Battersea Dogs & Cats Home

**David Mbaziira**, okusoka+co

**Emily Casson**, Cats Protection and Chair IoF North East

**Gemma Cornwell**, Barnardo's

**Hayley Gullen**

**Isobel Michael**, IoF Trustee

**James Taylor**, SCOPE

**Jaz Nannar**, Jaz Nannar Consulting

**Jenny Wildblood**, VOSCR

**Kunle Olulode**, Voice4Change England

**LaToya Charles**, Barnardo's

**Louise Firth**, Stonewall and Refuge

**Lucy Caldicott**, UpRising and ChangeOut

**Paul Amadi**, MS Society & British Red Cross

**Ruth Pitter**, VOSCR

**Samir Savant**, London Handel Festival

**Stephen Rimmer**, Barnardo's

**Tufail Hussain**, Islamic Relief

**CHANGE  
COLLECTIVE**

Institute of  
Fundraising