Creating Tools for Diversity, Equity and Inclusion (DEI) Fund Management

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Learning Objectives

Participants will be able to…

- Think strategically about the types of funds that may be created in support of diversity, equity and inclusion (DEI) at their organization.
- Consider key steps for preparing their organization to code and report on DEI funds.
- Assess & implement key elements of DEI fund training to strengthen their organization's capacity for success.

Diversity, Equity & Inclusion
Fund Management

Donors' Requests

Scholarship support for…

"...female students in the College of Engineering."

"...Black students in the College of Sciences."

"...students who are single parents."

"...Men's Basketball undergraduate student-athletes."

Governing Laws, Policies & Regulations

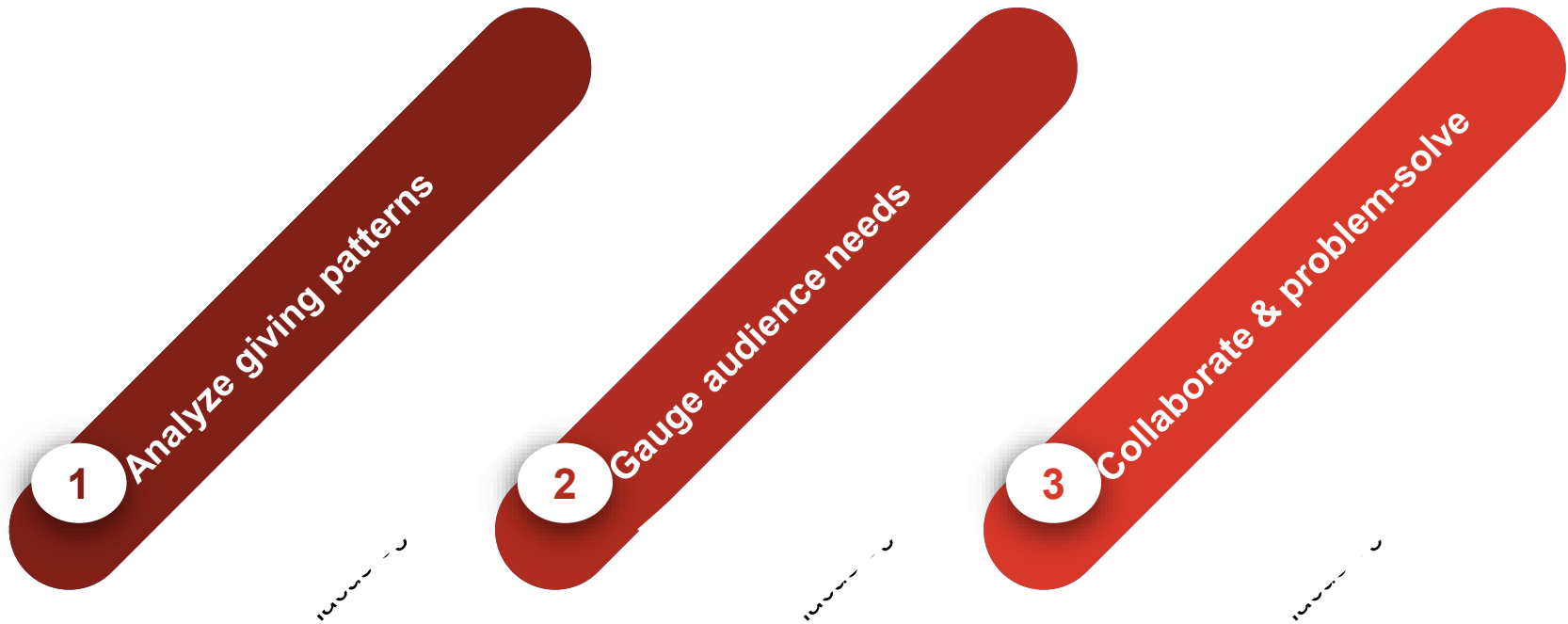| Policy	Element
Title VI of the Civil Rights Act of 1964	Prohibits discrimination on the basis of race, color or national origin.
Title VII of the Civil Rights Act of 1964	Prohibits discrimination on the basis of race, color, religion, sex or national origin.
Title IX of the Education Amendment of 1972	Prohibits discrimination based on gender in any education program or activity that receives federal financial assistance, and its regulations prohibit scholarships that are restricted on the basis of sex. Athletic scholarships, within certain parameters, are one of the exceptions under Title IX.
Fourteenth Amendment (relevant for state institutions)	Guarantees that no state shall "deny to any person within its jurisdiction the equal protection of the laws."
First Amendment's Establishment Clause (relevant for state institutions)	Prohibits the government from promoting or opposing religion.
NC State's Equal Opportunity, Non-Discrimination and Affirmative Action Policy	Defines discrimination as the "unlawful and unequal treatment based upon race, color, religion, creed, sex, national origin, age, disability or veteran status". Discrimination based upon sexual orientation is also prohibited by this policy.

Balancing Donor Intent & Governing Policies
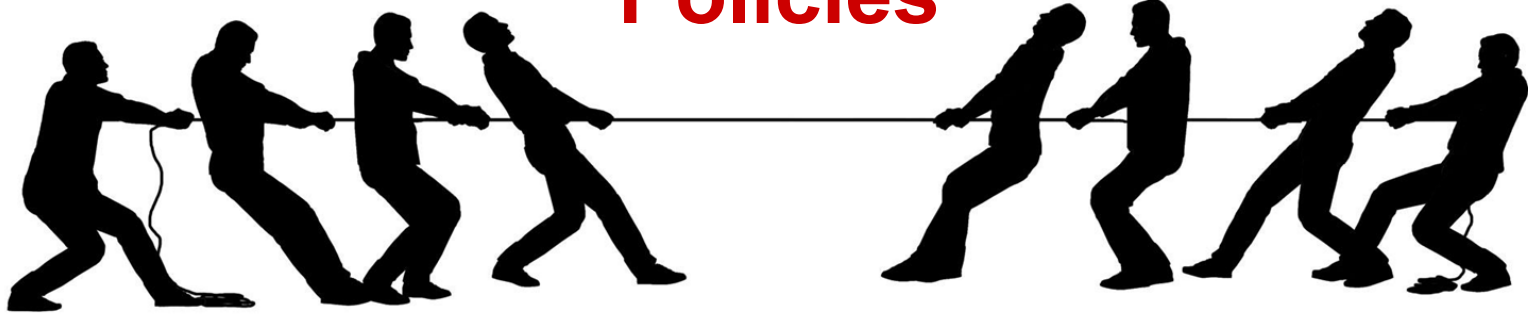
- Donors' desires to support diversity, equity and inclusion as components within new donor-established funds

- Title VI of the Civil Rights Act
- Title VII of the Civil Rights Act
- Title IX of the Education Amendment
- Fourteenth Amendment
- First Amendment's Establishment Clause (state institutions)
- Limited training & internal resources
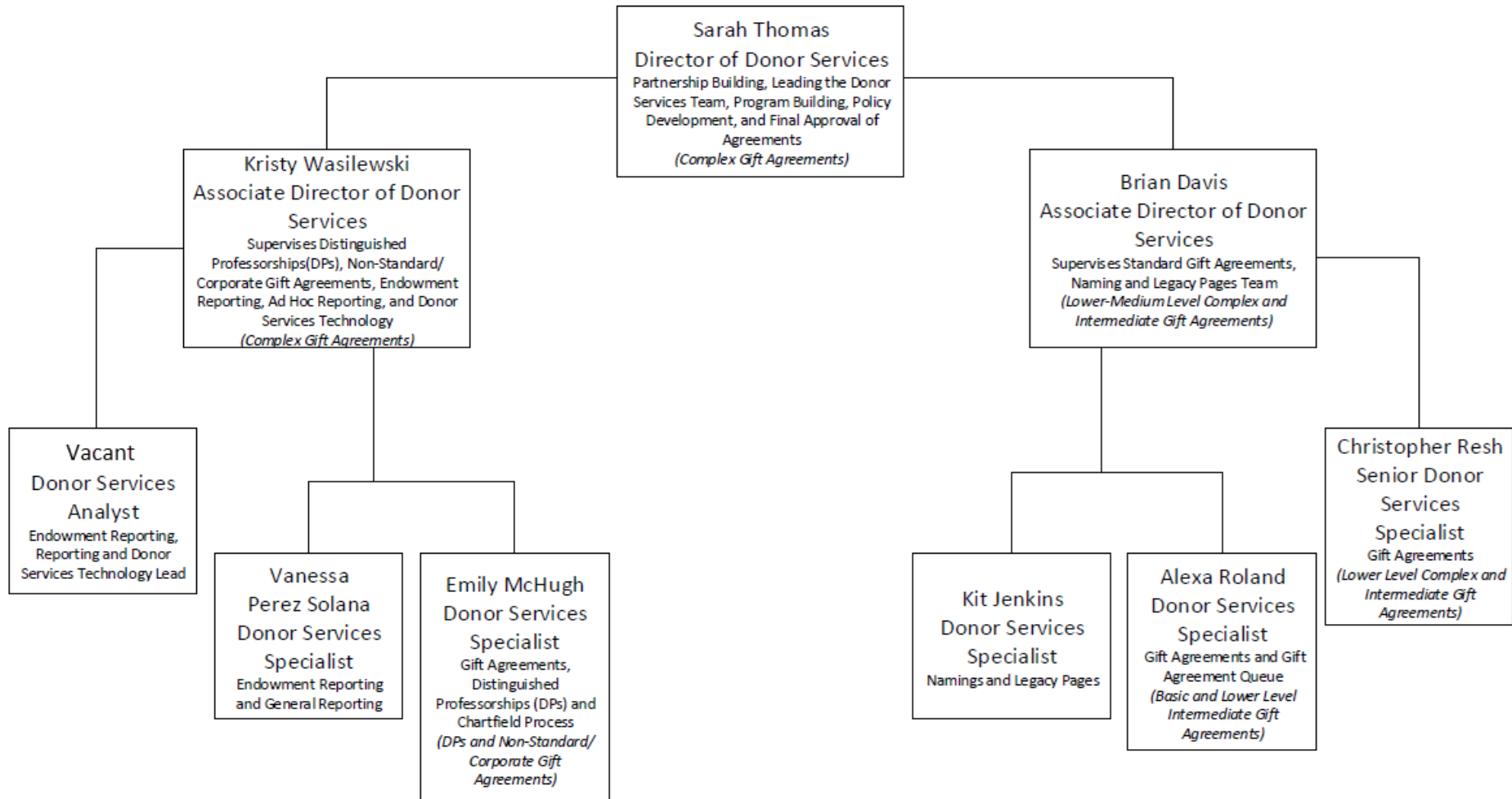- Logistical awarding challenges

Consider the Scope
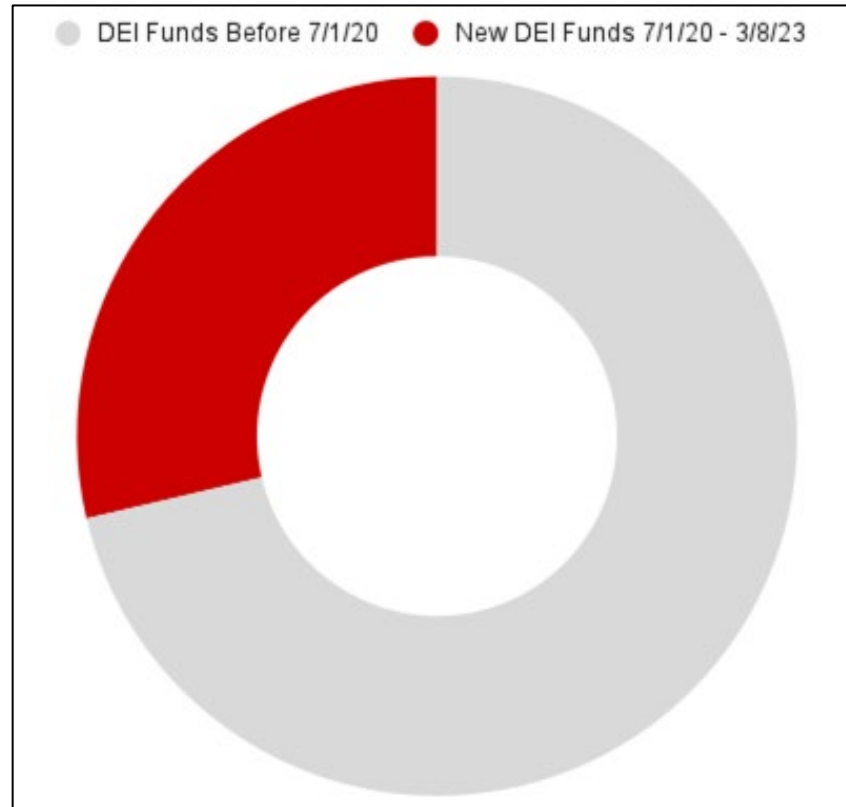
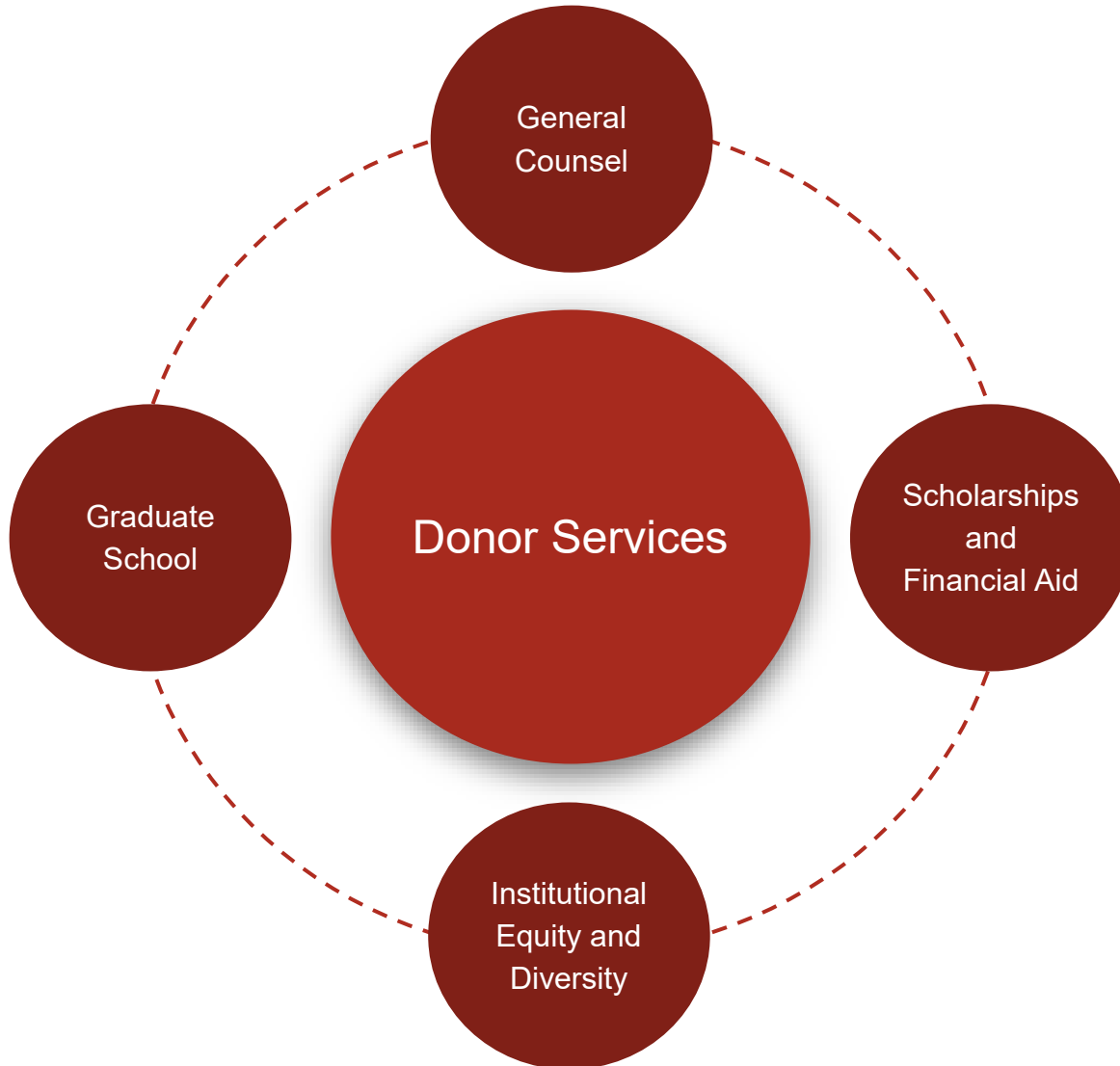Newly created funds with a diversity, equity and inclusion component.

Assess Needs

1. Analyze giving patterns

2. Gauge audience needs

3. Collaborate & problem-solve

Office of Donor Services

Sarah Thomas
Director of Donor Services
Partnership Building, Leading the Donor Services Team, Program Building, Policy Development, and Final Approval of Agreements
(Complex Gift Agreements)

Kristy Wasilewski
Associate Director of Donor Services
Supervises Distinguished Professorships(DPs), Non-Standard/ Corporate Gift Agreements, Endowment Reporting, Ad Hoc Reporting, and Donor Services Technology
(Complex Gift Agreements)

Brian Davis
Associate Director of Donor Services
Supervises Standard Gift Agreements, Naming and Legacy Pages Team
(Lower-Medium Level Complex and Intermediate Gift Agreements)

Vacant
Donor Services Analyst
Endowment Reporting, Reporting and Donor Services Technology Lead

Vanessa Perez Solana
Donor Services Specialist
Endowment Reporting and General Reporting

Emily McHugh
Donor Services Specialist
Gift Agreements, Distinguished Professorships (DPs) and Chartfield Process
(DPs and Non-Standard/ Corporate Gift Agreements)

Kit Jenkins
Donor Services Specialist
Namings and Legacy Pages

Alexa Roland
Donor Services Specialist
Gift Agreements and Gift Agreement Queue
(Basic and Lower Level Intermediate Gift Agreements)

Christopher Resh
Senior Donor Services Specialist
Gift Agreements
(Lower Level Complex and Intermediate Gift Agreements)

Donor Services 5/31/23

Goals

- To quickly streamline education and training pertaining to preferential language for diversity, equity and inclusion and relevant laws.

- To provide accessible resources to development officers to help them negotiate gift agreement language.

- To increase donor satisfaction.

- To develop tracking mechanisms for funds with DEI components within the CRM.

New Strategy for DEI Requests

01	Develop training materials

- Commonly asked questions
- Pre-approved language for common scenarios
- Governing laws, policies, & regulations

02	Host training with partners

- 360 degree view of the challenges
- United front regarding solutions

03	One central resource

- All partnering offices to direct development officers to Advancement to field questions and answer commonly asked questions

Training Materials & Resources

NC STATE UNIVERSITY

A Guide to Preferential Language within a Gift Agreement

The Office of Donor Services

NC STATE UNIVERSITY

Preferential Language within a Gift Agreement

1

Donors' Requests

Scholarship support <u>with preference given to</u>…

"…female students in the College of Engineering."	"…students who have demonstrated interest in equity, diversity or social justice for women by participating in community activities, social groups, student clubs or organizations that support this focus."
"…Black students in the College of Sciences."	"…students who have demonstrated experience in or a commitment to working with the Black community. Examples of demonstrated experience in or a commitment to working with the Black community may include, but are not limited to, students' volunteer activity and involvement in student organizations."
"…students who are single parents."	"…non-traditional students."
"…Men's Basketball undergraduate student-athletes."	In the context of athletics, this is acceptable. Title IX allows us to award scholarships where membership on the team (vs sex itself) is the primary criterion.

Training Opportunities

NC STATE UNIVERSITY

Diversity, Equality, Awarding and Philanthropy

Virtual Panel Discussion

December 8
3:00 - 4:30 p.m.

Host
- Associate Vice Chancellor, University Development

Panel Participants
- Associate Vice Provost and Director, Scholarships and Financial Aid
- Vice Provost for Institutional Equity and Diversity
- Director of Donor Services
- General Counsel
- Dean of the Graduate School

Tracking Mechanisms

New Tracking Mechanism

Advancement Services Section

☐ No Adv Allocation Needed   ☐ DEI

School Code	CFAE	CFAE Subcode
Agriculture/Life Sciences	Capital Endowment Restricted	Student Financial Aid

Purpose Type	Agency	Advance Program
Sch - Both	NC Agricultural Foundation	

This new tracking mechanism and coding assists us on tracking DEI funds.

NC STATE

DEI Definition for Allocation Coding

The DEI indicator will be utilized for funds supporting diversity, equity, and inclusion. Keywords may include but are not limited to, diversity, equity, inclusion, and underrepresented.

These are the primary overarching terms that will guide our coding:

Results

Streamlined Process for Common Questions

This reduced the amount of questions that Donor Services and partners were receiving.

+

Provided Standard Preferential Language

Gift agreements now have standardized language for preferences and development officers have an on-demand resource to use instead of contacting Donor Services.

+

Reduced Approval Times for Agreements

With new standard language, process and guide, the number of questions from development were reduced, along with the time needed for gift agreement negotiations.

Increased Donor Satisfaction with Gift Agreements with Preferential Language with Diversity, Equity and Inclusion

Overall Impact/Lessons Learned

Questions?