



# Strategy and Theory of Change

October 2020

*“[For] too long, philanthropy has operated under the premise that ‘disability is a worthy cause, but it isn’t ours.’ But relegating disability-related issues to a niche grant-making area or, worse, ignoring people with disabilities completely is no longer acceptable in philanthropy.”*

**— Rich Besser**

*President & CEO, Robert Wood Johnson Foundation*

**and Darren Walker**

*President, Ford Foundation*

***Chronicle of Philanthropy***

## Origin of the Presidents’ Council

There are 61 million American adults with disabilities. More than one in four people with disabilities live in poverty, and they are less than half as likely to be employed or to attain a college degree compared to people without disabilities<sup>1</sup>. Disability intersects with all identities, and structural forms of marginalization including racism and gender bias exacerbate the stigma and discrimination experienced by people with disabilities. Despite this reality, philanthropy is only now starting to recognize disability as a key element of its commitment to social justice, equity, and inclusion.

In 2019, with leadership from the presidents of the Ford and Robert Wood Johnson Foundations, our sixteen foundations made a five-year commitment to work together as the Presidents’ Council on Disability Inclusion in Philanthropy. While we are each at a different stage of the disability inclusion learning journey, we unite in our commitment to recognize ableism<sup>2</sup> as a core barrier to equity and inclusion. We commit to taking action for inclusion within our foundations, and to collectively share our learning to influence the philanthropic sector. Our long-term aspiration: As our sector becomes more equitable, we will influence communities and organizations to dismantle structural ableism and move toward equity.

This document summarizes the Council’s five-year strategy and theory of change. It is intended as a strategic guide for the members of the Presidents’ Council.

1 <https://www.nationaldisabilityinstitute.org/wp-content/uploads/2019/02/disability-race-poverty-in-america.pdf>. 27% of people with disabilities live in poverty compared to 12% of people without disabilities. 13% have a bachelor’s degree or more compared to 31% of adults with no disability. Fewer than one in three working-age adults (33%) with disabilities are employed, compared to 75% of adults without a disability. For total number of adults with disabilities see <https://www.cdc.gov/ncbddd/disabilityandhealth/infographic-disability-impacts-all.html>

2 Ableism is the discrimination and stigma disabled people face based on the presumption that those without disabilities are “normal” and people with disabilities are inferior.

# Strategic Plan

## Council Mission

*Our mission is to coordinate philanthropic leadership to advance disability inclusion in philanthropy.*

## Long-Term Vision

The philanthropic sector will integrate disability rights and justice seamlessly into its agenda by increasing:

- ***A culture of inclusion*** — Disability-inclusive policies and practices that amplify the agency of people with disabilities and remove barriers to full participation.
- ***Disability participation*** — Increases in the numbers of disabled staff and board members in philanthropy.
- ***Disability grantmaking, including:***
  - Disability-Specific Grantmaking to Disabled Persons Organizations (DPO)<sup>3</sup> and to non-disability organizations for projects that specifically address disability (for example a grant to a criminal justice organization to address issues of disability in the carceral system).
  - Disability-Inclusive Grantmaking that intentionally addresses the intersections of disability as a secondary issue within all program areas and populations.

3 The Disability Rights Fund defines Disabled Persons Organizations as “representative organizations or groups of persons with disabilities, where persons with disabilities constitute a majority of the overall staff, board, and volunteers in all levels of the organization.” Note that for children and some specific types of disabilities the definition includes organizations led by relatives of people with disabilities that have empowerment and the growth of self-advocacy as primary aims. The definition states that all DPOs are guided by the social model of disability, which holds that barriers are caused by society, rather than by a person’s disability. <https://disabilityrightsfund.org/faq/what-is-a-dpo/>

## 2024 Goal

Transition the Presidents' Council into a sustainable structure such as a disability inclusion philanthropy affinity group that will continue to:

- Challenge philanthropy to be more inclusive, guided by the core disability rights principle of “nothing about us without us.”
- Educate the sector about the intersections of disability with all dimensions of social change.
- Track progress in philanthropic sector disability participation and grantmaking.

## Values

The following values guide our work:

- Disability intersects with the most critical challenges in the US and worldwide.
- “Nothing about us without us” – we recognize the disability community’s leadership and incorporate people with disabilities in decision making.
- Disability is an integral part of diversity; and disability is itself diverse and inclusive of all other identities.
- Anti-ableist principles we continue to learn from disability leaders including but not limited to: full participation, intersectionality, the value of all bodies, independent living, and equal opportunity.

## Influencing Factors We Seek to Change

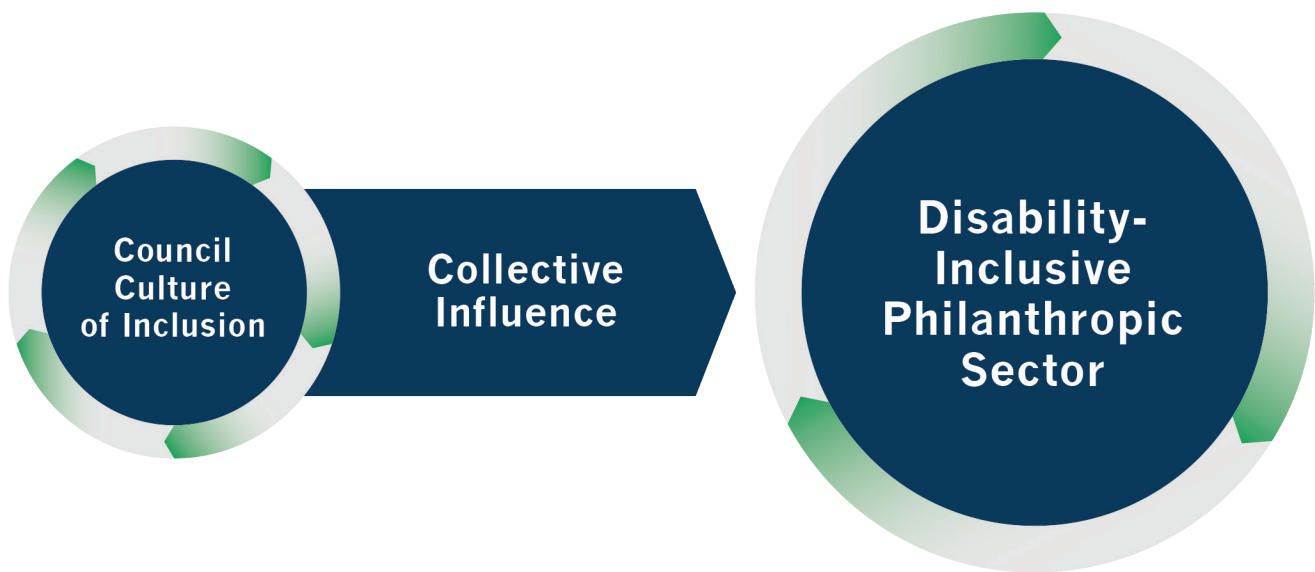
We will work to change ableist assumptions and norms that inhibit our ability to achieve true inclusion, such as:

- The idea that disability is “abnormal” and a problem to be fixed.
- Assumptions that some bodies and lives have more value than others.
- The lack of awareness and connection to a marginalized/ historically excluded community.
- The stigma that inhibits self-disclosure and genuine inclusion.
- The failure to include disability in frameworks of inequality.
- The failure to measure disability participation and grantmaking.
- The lack of awareness that disability also co-exists with other marginalized identities (i.e., disabled people of color, LGBTQ + disabled).

## Our Theory of Change

How will we achieve our long-term vision of inclusion in philanthropy? What outcomes and impacts will help us know if we are successful? The idea of a learning journey reflects that social change has a long trajectory. We know that in our five years together we will not finish the work internally nor in our sector, but we are confident that we can make progress.

As Presidents' Council foundations, we commit not only to embark upon a journey toward disability inclusion, but also to share our learning with other foundations. We are diverse in size, focus, structure, and purpose. With the commitment of top leadership, we have the potential not only to influence our own foundations, but to use our “bully pulpit” to help our peers see that their work to achieve equity is missing an essential dimension. If we act with transparency, and are intentional about our collective work, we will move our sector toward a new commitment to fully include people with disabilities in all that we do.



# Council Internal Journey

The Council's **Internal Journey** includes the elements of learning and engagement, narrative change and operations change. These work in concert to create a culture of inclusion which will in turn support and realize disability participation and grantmaking.

## Creating a Culture of Inclusion

### *Learning & Engagement*

We recognize that disability inclusion is a learning journey, and that each member foundation is at a different stage. **We also recognize that learning and engagement is continual and that each action step results in additional lessons learned, which in turn will drive new actions that increase inclusion.** Essential to our learning and action is **engagement** with disability issues and disabled people – both in the community, within each foundation, and in the philanthropic sector.

### *Narrative Change*

We identify narrative change as an initial outcome because disability has been overlooked by philanthropy as a key area of social justice. We operate in a society steeped in stigma and ableism. Philanthropy has a role to play in **changing the narrative** to insist that disabled lives are lives worth living, that the voices of people with disabilities must be centered, and that disability intersects with all other identities and issues. The traditional “medical” model of disability stems from the belief that people with disabilities must be fixed or cured. From this line of thinking comes the “charity” model of disability, a lens through which disability is perceived as a tragic and people with disabilities are viewed as being in need of “saving” by people without disabilities.

We seek to change our internal and external communications and messaging to embrace a social and intersectional model of disability. The social model values all lives equally and recognizes that we have a responsibility to change our environment, social norms, and policies to accommodate and fully include disabled people. The intersectional model recognizes that disability intersects with all identities, and that people with disabilities are frequently multiply marginalized.

### *Operations Change*

Operations change is at the beginning of our work because we recognize that before we ask others to do the work of inclusion, we must demonstrate that we are living our values. Society discriminates against people with disabilities when it establishes barriers to full



inclusion. We begin the journey to **remove those barriers in our facilities, employment policies, events, processes, policies, and activities. We commit to seeking expertise in the disability community** to guide us on our intentional and ongoing journey.

## **Moving Toward Equity: Outcomes**

**Narrative change and operations change will in turn support our longer-term goals of increased participation and grantmaking.** For example, best practices in the corporate sector demonstrate that when organizations take concrete action to be more disability inclusive (for example through welcoming language and explicit accommodations policies), self-identification, recruitment, retention, and promotion of people with disabilities increases.

### ***Disability Participation***

We seek outcomes in **participation** – and we use that word instead of representation to indicate that this is about full and equal participation, not tokenism. This means that we incorporate disability community leadership from outside our foundations and deeply listen to the community. But it also means that we must seek participation internally on our staff and through leadership on our boards. One in four American adults has some form of disability and it is time that philanthropy recognizes and incorporates disability as an essential part of our diversity. When we have **people with disabilities at the table** as employees and board members, our foundations will begin to represent the broad perspectives, knowledge, and adaptability of our population and we will become more innovative and equitable as a result.

### ***Disability Grantmaking***

We seek outcomes in **grantmaking** because disability issues and organizations have been significantly underfunded<sup>4</sup>. In addition, all of the programs we fund will become more effective if they incorporate a “disability lens.” This means investigating how people with disabilities are impacted by any issue, how barriers to participation can be removed, and whether disabled people are playing key roles in the programs we fund. Current data is inadequate to understand the dollars invested in “disability-specific grants” that support disability-focused projects, and “disability-inclusive grants” that explicitly incorporate a disability lens in broader programs. By 2024, we hope to identify baseline numbers, and promote targets for increased investment, and systems for coding and long-term tracking.

We are also investing in a Disability Inclusion Fund managed by Borealis Philanthropy to invest in movement building and pilot participatory grantmaking. Lessons from this fund will be essential components of our learning journey, and will inform us as we expand our more comprehensive commitment to disability-specific and disability-inclusive grantmaking.

4 Human Rights Funders Network estimates that disability received 2% of international human rights funding in 2017.  
<https://humanrightsfunding.org/populations/disabilities/>

# Council Collective Influence

The Council's Collective Influence agenda has four facets: **communicate urgency**, **model best practices**, **create accountability**, and **foster a peer learning network**.

## *Communicate Urgency*

The Covid-19 pandemic has revealed how deeply rooted systemic ableism intersects with other forms of discrimination to threaten disabled people's lives and deprive them of their civil rights. Disability inclusion must no longer be an afterthought, and we are uniquely situated to encourage philanthropy to amplify the voices of disabled leaders as they point the way to creating a more equitable and just society. At the same time, we are shifting the narrative towards the social model of disability within our own foundations, we must help our peers recognize that until we incorporate disability, we cannot achieve justice and equity.

## *Model Best Practices*

In the short term, Council Foundations will each work internally to increase disability inclusion. As we move from learning to action, we hope to make our own organizations more equitable, to become more effective change-makers, and to model inclusion best practices for our sector. We know that this journey can be complex, and we commit to learning from both our successes and failures. Ultimately, we seek to create policies, practices, and metrics for disability inclusion that we can use to hold ourselves and our sector accountable.

## *Create Accountability*

Disability is underfunded. As we develop measures for both disability-inclusive and disability-specific grantmaking in our own foundations, we will also seek to understand the baselines for the field, share definitions, and seek sector-wide commitment to ongoing measurement of disability inclusion in philanthropy.





### *Ongoing Peer Learning and Accountability Network*

While we focus internally on our own institutions, we will work collectively to build a peer learning network that engages other funders. The hub for this network is our Disability & Philanthropy Forum (hereafter the Forum). People working or consulting for funding institutions are encouraged to join as members of the Forum. They can benefit from special member resources, newsletters and learning opportunities. Growing Forum membership and increasing member engagement through expanded resources and educational tools are key strategies to increase awareness and expand inclusion.

The Council's five-year commitment to work together ends in December 2024. By that time, we plan to have a sustainable structure in place that will carry forward the work of peer learning and accountability to increase disability inclusion. There are more than 86,000 foundations in the US<sup>5</sup> alone, and most do not address disability as part of their funding or operations. Building inclusion into our sector will require sustained effort, continued meaningful engagement with disabled experts and ongoing measures of accountability.

## **What is Disability?**

Disability is part of diversity, some of the infinite threads woven through the fabric of our world. Every person's experience of disability is unique and belongs only to them, but for so many of the more than 1 billion people with disabilities around the globe, disability is not considered something that needs to be "fixed," "cured," or "eliminated," but rather it's celebrated as an identity—part of what makes a person who they are.

According to the legal definition set forth by the Americans with Disabilities Act, a person with a disability is someone who has a physical or mental impairment that substantially limits one or more major life activity. Disabilities can be apparent or non-apparent, something a person is born with or acquired at any point in life. Disability includes, but is not limited to, mobility disabilities, mental health disabilities, chronic illnesses, intellectual and developmental disabilities, and hearing and vision disabilities.<sup>6</sup>

<sup>5</sup> <http://data.foundationcenter.org/>

<sup>6</sup> For more information see <https://disabilityphilanthropy.org/resource/what-is-disability/>

# Disability-Inclusive Philanthropic Sector

With this internal learning and collective action underway, we will move toward influencing the broader philanthropic sector to embark on a learning journey, commit to narrative and operations change, and be accountable for increasing **disability participation** and **grantmaking**.

We envision a philanthropic sector that embraces a culture of inclusion, supported by an affinity group or other structure that continues to be a hub for both learning and accountability. Our sector will embrace leadership of disabled people both through grantmaking support, and by inviting people with disabilities into our organizations as employees, board leaders and consultants. As more philanthropies commit to building the capacity of Disabled Persons Organizations and integrate disability into grantmaking policies and practices in all areas, we will together take strides toward social justice and equity both within philanthropy and in our grantee organizations and communities.

The graphic that follows demonstrates the sectoral change and exchange that is possible as more organizations work towards a disability-inclusive philanthropic sector.

Evidence of increased inclusion can be demonstrated by the indicators and outcomes in the Logic Model on page 12.



# Theory of Change



# Logic Model

## The Outcomes We Seek

	Culture of Inclusion	Disability Participation	Disability Grantmaking
2022 Outcomes	<ul style="list-style-type: none"><li>Disability &amp; Philanthropy Forum members increase knowledge of best practices for disability inclusion.</li><li>Presidents' Council Foundations demonstrate shift in attitudes and understanding of disability rights and disability justice models that value the lives and center the voices of people with disabilities.</li></ul>	<ul style="list-style-type: none"><li>Presidents' Council Foundations increase our knowledge of best practices for creating disability-friendly environments.</li><li>Presidents' Council Foundations increase and strengthen established and informal relationships with the disability community.</li></ul>	<ul style="list-style-type: none"><li>Presidents' Council Foundations have increased knowledge of the issues, challenges and policy changes advocated by the disability community to dismantle systemic ableism.</li><li>Presidents' Council Foundations have increased knowledge of the intersections of disability issues with their program areas.</li><li>Disability &amp; Philanthropy Forum members<sup>7</sup> increase their knowledge of the state of disability grantmaking in the United States.</li></ul>
2024 Outcomes <i>(by the end point of the Presidents' Council)</i>	<ul style="list-style-type: none"><li>Presidents' Council members model disability inclusive policies and practices to the sector.</li><li>Disability &amp; Philanthropy Forum members demonstrate their knowledge of best practices for disability inclusion.</li><li>Disability &amp; Philanthropy Forum members demonstrate shift in attitudes and understanding of disability rights and disability justice models that value the lives and center the leadership of people with disabilities.</li><li>Presidents' Council transitions to a structure for ongoing learning, engagement, and accountability (such as an affinity group).</li></ul>	<ul style="list-style-type: none"><li>Presidents' Council Foundations have adopted and are enforcing policies to increase the number of disabled employees and board members, using Federal contractor standards as a benchmark.<sup>8</sup></li><li>Presidents' Council Foundations have adopted and are enforcing policies to expand engagement with disabled people in community engagement, grantmaking processes and other initiatives.</li></ul>	<ul style="list-style-type: none"><li>Presidents' Council Foundations increase their disability-specific grantmaking.</li><li>Presidents' Council Foundations have policies and application processes in place to include disability in their overall grantmaking policies and application processes (e.g. all grantmaking includes a disability lens).</li></ul>
2030 Philanthropic Sector Impact	<ul style="list-style-type: none"><li>Ongoing peer learning continues across foundations and philanthropic sector.</li><li>Policies and metrics in place to create accountability for disability participation and grantmaking.</li></ul>	<ul style="list-style-type: none"><li>Increased disabled board members to meet or exceed Federal employee standards.<sup>9</sup></li><li>Increased disabled employees to meet or exceed Federal employee standards.</li><li>Increased engagement of grantmaking institutions with disability-centered organizations.</li></ul>	<ul style="list-style-type: none"><li>Increased funding to support disability-focused projects.</li><li>Disability equity is included in all dimensions of grantmaking across program areas.</li></ul>

7 Disability & Philanthropy Forum members work in or consult with funding institutions, and have signed up to become members of the Forum on [www.disabilityphilanthropy.org](http://www.disabilityphilanthropy.org). As of August 2020, there are approximately 420 members of the Forum.

8 Section 503 of the Rehabilitation Act requires Federal contractors to set a goal of 7% people with disabilities in all job categories <https://www.dol.gov/agencies/ofccp/faqs/section-503>.

9 For Federal employee standards under section 501 of the Rehabilitation Act see <https://www.eeoc.gov/laws/guidance/questions-answers-eeocs-final-rule-affirmative-action-people-disabilities-federal>.

# Strategies to Achieve 2022 Outcomes

The following work is underway to reach the outcomes identified for the Council's mid-point in 2022.

Culture of Inclusion	Disability Participation	Disability Grantmaking
<p>Disability &amp; Philanthropy Forum (Forum) members increase knowledge of best practices for disability inclusion.</p> <p><b>Collective Actions</b></p> <ul style="list-style-type: none"><li>Disability &amp; Philanthropy Forum website launched, enhanced, and continually updated with resources that highlight best practices and prioritize key elements of an inclusion learning journey.</li><li>Communications campaign in place to generate additional media, drive membership in the Forum, and elevate disability inclusion as an area for philanthropic attention.<ul style="list-style-type: none"><li>Communications campaign increases number and engagement of Disability &amp; Philanthropy Forum members.</li></ul></li></ul>	<p>Presidents' Council Foundations have increased knowledge of best practices for creating disability-friendly working environments, programs, and organizations.</p> <p><b>Foundation Actions</b></p> <ul style="list-style-type: none"><li>Presidents and their staff commit to completing disability audits, including accommodations language in invitations.</li><li>Presidents' Council Foundations provide disability training to staff and board members.</li><li>Presidents' Council Foundations issue statements and policies using person-first or identity-first language.</li><li>Presidents' Council Foundations have increased knowledge of disability self-disclosure and demographic tracking approaches and initiate policies and practices to embed them in their operations.</li></ul>	<p>Presidents' Council Foundations and Forum members have increased knowledge of the issues, challenges and policy changes advocated by the disability community to dismantle systemic ableism.</p> <p><b>Collective Actions</b></p> <ul style="list-style-type: none"><li>Forum resources and webinars highlight key issues.</li><li>Presidents' Council sponsors communications campaigns to disseminate information widely through social media and other channels that reach philanthropic audiences.</li><li>Disability Inclusion Fund managed by Borealis Philanthropy models participatory grantmaking and movement building strategies and disseminates information to Presidents Council and Forum members.</li></ul>
<p>Presidents' Council Foundations demonstrate shift in attitudes and understanding of disability rights and disability justice models that value the lives and center the voices of people with disabilities.</p> <p><b>Foundation Actions</b></p> <ul style="list-style-type: none"><li>Presidents' Council Foundations share knowledge and their learning journeys through website resources, blog posts, op ed, social media, and other channels.</li><li>Presidents' Council Foundations increase use of person-first and identity first language in public diversity statements, their websites, and other channels.</li></ul>	<p>Presidents' Council Foundations increase their established relationships with the disability community.</p> <p><b>Collective Actions</b></p> <ul style="list-style-type: none"><li>Advisory groups include people with disabilities.</li><li>Cross-foundation conversations promoted among disabled staff members and allies – affinity or resource group piloted.</li><li>Policies in place to include people with disabilities in community engagement and in foundation DEI statements.</li></ul>	<p>Presidents' Council and Forum members have increased knowledge of the intersections of disability issues with their program areas.</p> <p><b>Collective Action</b></p> <ul style="list-style-type: none"><li>Presidents' Council commissions white papers or fact sheets highlighting key issues, and disseminate through Forum, social media, and broader communications campaigns.</li></ul>
<p>Presidents' Council adopts a plan for sustaining collective action for disability inclusion.</p> <p><b>Collective Actions</b></p> <ul style="list-style-type: none"><li>Presidents' Council researches feasibility of fiscal agency or subsidiary relationship.</li><li>Presidents' Council considers interim and long-term operating budget and structures.</li></ul>	<p>Presidents' Council and Forum members have increased knowledge of disability participation in the philanthropic sector.</p> <p><b>Collective Action</b></p> <ul style="list-style-type: none"><li>Presidents' Council commissions research or creates partnerships to develop a baseline understanding of disability participation in the sector.</li></ul>	<p>Presidents' Council and Forum members have increased knowledge of the state of disability grantmaking in the United States.</p> <p><b>Collective Actions</b></p> <ul style="list-style-type: none"><li>Presidents' Council commissions research to determine grantmaking baselines and pilot tracking in Presidents' Council Foundations.</li><li>Presidents' Council commissions consultants to develop coding and tracking systems for disability grantmaking.</li></ul>

# Credits

This document was authored by Presidents' Council consultant **Emily J. Harris** of Harris Strategies LLC, with input from the Research & Learning Advisory Group:

**Tina Kauh**, Chair, Research & Learning Advisory Group and Senior Program Officer, Research-Evaluation-Learning Unit, Robert Wood Johnson Foundation (co-chair with Emily)

**Anna Cruz**, Director of Learning and Evaluation, Kresge Foundation

**Camille Emeagwali**, Senior Vice President, Programs & Strategic Learning, New York Women's Foundation

**Sindy Escobar Alvarez**, Senior Program Officer for Medical Research, Doris Duke Charitable Trust

**Anjali Forber-Pratt**, Assistant Professor, Department of Human & Organizational Development, Vanderbilt University

**Mona Jhavar**, Learning and Evaluation Manager, California Endowment

**Chantell Johnson**, Managing Director, Evaluation, MacArthur Foundation

**Jackie Kaye**, Chief Learning & Evaluation Officer, Wellspring Philanthropic Fund

**Phyllis Meadows**, Senior Fellow, Health, Kresge Foundation

**Rama Murali**, Learning Officer, Office of Strategy and Learning, Ford Foundation

**Elizabeth (Liz) Oo**, Evaluation Officer, MacArthur Foundation

**Randall Owen**, incoming Director, Nevada Center for Excellence in Disabilities

**Adela Ruiz**, Program Associate, Office of the President, Ford Foundation

**Hannah Shaul Bar Nissim**, Deputy Director, Ruderman Foundation

**Joyce Ybarra**, Director of Learning, Weingart Foundation

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