BUILDING AN INCLUSIVE BOARD

Pathways for EDUCATION, EXPLORATION and ACTION

DEVELOPED BY
RACHEL BRANAMAN

WITH
CAROLE RYLANDER, CFRE

SPONSOR
BARBARA SHELTON, CFRE
## CONTENTS

**INTRODUCTION** ............................................................... 3

**HOW TO USE THIS GUIDE** ................................................ 4

**WHO THIS GUIDE IS FOR** ................................................. 5

**EDUCATION** ....................................................................... 5

  Benefits of Being Inclusive ............................................. 6

  Distinguishing Terms and Concepts ................................. 9

  Four Levels of Racism .................................................. 13

  Typology of Inclusion .................................................. 15

**EXPLORATION** ............................................................... 17

  Organizational Readiness Assessment ............................ 17

  Equity and Inclusion Self-Assessment Test ....................... 20

  Board Recruitment Tool .................................................. 22

**ACTION** ................................................................. 25

  Individual ........................................................................ 26

  Interpersonal ................................................................... 27

  Institutional ..................................................................... 28

  Structural ....................................................................... 31

**CONCLUSION** ............................................................... 32

**RESOURCE MATERIALS** ................................................. 33
Nonprofits and philanthropic organizations have long touted the value of diversity, equity, inclusion, and accessibility (DEIA). “Embrace diversity!” can be heard across the sector as a rallying cry. In response, institutional funders tacked questions on to their grant processes asking, “How do you incorporate DEIA into your organization?” In response, executive leadership carefully crafted and honed language about their present practices through a DEIA lens. But when asked, nonprofits reported only 52% had formal diversity statements and of those organizations only 31% reported having a diversity strategy (Nonprofit HR, 2019).

Unfortunately, we see limited intentionality by nonprofit and philanthropic leaders to make space for equity and inclusion to flourish in their organizations. This may be due in part to unclear expectations – who determines what strategy nonprofits should take to incorporate DEIA into their organizational responsibilities? What tools are available to organizations with limited financial resources to implement this work? Who should be part of this effort in a nonprofit and how can we ask employees who are already stretched thin to juggle another job responsibility?

Not everyone in an organization will be in the same place in their DEIA journey. Some folks may struggle to understand DEIA language and information while others may claim that it unfairly penalizes and harms white communities. Furthermore, those who are passionate about DEIA may feel overwhelmed and unable to determine a starting point as they see the sheer amount of discussion and work that needs to be done.
Committing to an equity and inclusion culture means moving beyond checkbox approaches to full integration of inclusion principles in every aspect of the organization. The Awake to Woke to Work report (Equity in the Center, 2019) identifies organizations that demonstrate this commitment through common characteristics. We have altered their characteristics to incorporate equity and inclusion principles for numerous intersecting identities:

- Diverse representation at all tiers of the organization
  - All leadership and organizational ranks hold a critical mass of people of color and identities that are important to your organization’s defined community
- Self-awareness and communication skills
  - Staff, stakeholders, and leaders are skilled at talking about racism, privilege, bias, inclusion, and their implications
- Permeability
  - Programs are culturally responsive and were created using an equity and inclusivity lens
- Co-authorship
  - Communities are treated as stakeholders, leaders, and assets to the work
- Patterns, trends, and other important data
  - Evaluation efforts incorporate the disaggregation of data
- Financial commitment that matches messaging
  - Expenditures reflect organizational values and a commitment to equity and inclusion
- Sustained effort to continue this work
  - Continuous improvement in equity and inclusion is prioritized and given the resources necessary to maintain the effort

HOW TO USE THIS GUIDE

We have compiled this document as a guide and toolkit to spur your organization to action. In it, you will find information that

- Speaks to the value and return on investment (ROI) of integrating DEIA in your organization which can be a helpful motivational resource for board members, community partners, and other key stakeholders.
- Definitions, background information on concepts, and examples relating back to the nonprofit field.
- Principles and practices of inclusion alongside implementation tools to start your organization on an intentional journey toward equity and inclusion.

We hope the following guide, pointers, and tools will offer inspiration and guidance about how to embrace DEIA and its fundamental values, so your efforts permeate every level of your organization. As you diversify your board members, employees, donors, and others you will be able to use their unique perspectives to influence how the organization approaches its mission and steer the organizational culture in more inclusive and innovative ways.

As you move through the document you will see DEIA referred to primarily as equity and inclusion practices. We use that language to emphasize what we see as the core components that bring DEIA to life.
WHO THIS GUIDE IS FOR

This resource is intended for board members, chief executives, and nonprofit consultants who are ready to advance equity and inclusion in your organizations and professional spaces. Like Equity in the Center’s metaphor of Awake to Woke to Work, we broke down this document based on three key areas that drive the process – education, exploration, and action.

As you read this, remember there is not one perfect or right path to engage in this work. Each organization must create their own way. What works well for an alcohol rehabilitation center may not work for a family and youth social service agency or a policy research institute. Nor would you expect to ask and explore the same questions across these organizations.

For instance, a rehabilitation center may need to explore how drinking patterns show up in different community populations with a focus on race, gender/sexuality status (LGBTQIA2S1), veteran status, immigrant status, and mental health considerations. Using this data, they would determine how bias plays into their structures and processes. Sample questions for the exploration process might include:

• People who feel stigmatized are less likely to seek treatment even if they have the same addiction severity as non-stigmatized. In what ways can an agency reduce stigmatization in intake and program processes?
• When a person enters a 12-step meeting they are told they are powerless. As women are more likely to have a history of sexual assault or unwanted sexual encounters, this messaging may be disempowering. What are the implications of this for an organization’s treatment program? How can this message be reframed to empower?
• Commonly used terms like “alcoholic,” “addict,” and “substance abuser” carry an implicit association with physical, sexual, or emotional abuse. Clinicians who use these terms are more likely to say that punishment is required as opposed to treatment. Is the language on the website, brochures, social media, and by staff welcoming to the unique personal identities that an organization intends to reach?

1Lesbian, gay, bisexual, transgender, queer, intersex, asexual, two-spirit
For nonprofit and philanthropic organizations, historically boards of directors have been made up of family members or friends who were reliable, like-minded, and well-known in their community. They existed to support an executive director’s plan and assure donors that experienced people were looking out for their interests. However, boards built on the personal relationships or friends of the founder may: 1) undermine board independence, 2) create insularity, and 3) prioritize homogeneity (Russell Reynolds Associates, 2017).

Having a wide range of perspectives represented in a board of directors is essential for governance. If the community you serve is not represented in the boardroom, then you risk overlooking opportunities, anticipating challenges, and assessing risks. There is not one answer to the issues facing a nonprofit.

Imagine, a well-meaning organization founded by a dedicated White social worker to overcome the barriers facing teen mothers. The social worker reached out to her network to assemble a board of directors to support this work – building a small board made up of attorneys, businesspeople, and community leaders. While the board had tremendous empathy for the young women being served, the board makeup was 100% White from upper middle-class and upper-class environments including both men and women who became parents in adulthood. For many, this was their first experience in a board leader role. While teen motherhood does not differentiate based on race or ethnicity, Black and Hispanic/Latina young women are more likely to face barriers or lack the available resources to deal with potential pregnancy. Once their child is born, government systems may limit their ability to effectively parent. Without a robust support system, both they and their child deal with the consequences.

In a situation as the one described above, where none of the board members were teen parents nor had they had faced similar lived experiences as the young women entering the program, diversity and inclusion are not just the right thing to do but are integral to the nonprofit’s mission and program agenda. Boards are at their best when there is a diversity of culture, thinking, and perspective (Russell Reynolds Associates, 2017).

Imagine what the nonprofit would have been able to accomplish on behalf of the young women the organization served if they could draw from a wide range of perspectives, experience, and knowledge.
Creating an inclusive workplace is good for creating a healthy work environment and ensuring that an organization is best able to serve their constituents and communities. BoardSource’s 2017 Leading with Intent study found that 90% of chief executives, 90% of board chairs, and 84% of board members were Caucasian/White. Only 4% of chief executives, 5% of board chairs, and 8% of board members were African American/Black. Asians, Indigenous, Hispanic/Latinx, or Multi-Race fared worse in representation. Male versus female representation fared better with 72% of chief executives, 42% of board chairs, and 48% of board members being women. Unfortunately, there was 0% non-binary and trans representation of chief executives and less than 1% for board chairs or board members. While nonprofits have a wide range of age represented at staff levels, the chief executive, board chair, and board member roles are almost entirely 40 years and older with more than 50% being 50 years or older. Only 11% of chief executives, 11% of board chairs, and 17% of board members were under 40 years of age. The BoardSource report found that boards were no more diverse than they were in 2015 and since they began tracking diversity data in 1994, the levels of board diversity have largely remained unchanged, with people of color and ethnic minorities never representing more than 18% of board membership (BoardSource, 2017).

By including those who were previously excluded, we all benefit. Board equity is not a zero-sum game where including one group hurts another. Rather when we prioritize inclusion and accessibility, everyone wins. Success should be measured not by whom we exclude but by whom we include.

While chief executives understand the connection between diversity and a board’s role in strategy and planning, they still struggle to create inclusiveness within their organizations. That may be because board chairs and chief executives disagree on whether their boards have enough racial and ethnic diversity. BoardSource reports 65% of chief executives report they are somewhat or extremely dissatisfied with the level of racial and ethnic diversity compared to 41% of board chairs (BoardSource, 2017).
As boards of directors are meant to support strategy and governance, it is not part of their duty to take an active role or responsibility for day-to-day operations. However, this means board members and chairs have limited interaction with constituents and organizational partners. That is part of the reason why it is important for chief executives to share the value add that diversity and inclusion bring to all aspects of an organization, such as:

1. Increased organizational flexibility and ability to learn from people with different lived experiences, cultural backgrounds, and other intersecting identities.

2. Positive influence on program development and service delivery that lead to strategic agenda-setting, issue education around mission-related topics, and political action that supports community building.

3. Added trust and enhanced reputation within the communities served as well as the public.

4. New opportunities to expand donor networks to include a wide array of people from diverse socio-cultural backgrounds.

5. Improved quality of personnel through stronger recruitment and retention strategies.

6. Healthier working environments that lead to higher job satisfaction and employee morale, especially among staff members from BIPOC communities, lower staff turnover and higher productivity, and increased creativity and innovation and improved problem-solving.

7. Decreased vulnerability for an organization to face legal challenges.

Board members are often chosen for their ability to raise money for an organization's mission. Seeing as people of color lack equitable access to individuals in decision-making roles or institutions of financial power, they are often overlooked as board member material. In this unfortunate cycle, organizations consistently return repeatedly to the same donors without expanding their reach to new communities. By adding board members from diverse community backgrounds an organization is more likely to engage in new fundraising tactics and move beyond engagement with only White donors. Research shows philanthropy is just as prevalent in non-White communities and is being practiced in a variety of formal and informal ways.

Various formal and informal giving methods include:

- Remittances to family members overseas are common in immigrant families who send billions of dollars to families in their home countries
- Giving to family and friends through concepts like balikbayan, a Filipino tradition of giving gifts when people return to the Philippines
- Giving circles organized around social identities like race, gender, or religion
- Mutual aid societies
- Identity-based funds (Greek societies, women's clubs, cultural/social organizations)
- Horizontal giving where individuals make contributions at all income levels
- Donating time or resources
- Religious or culturally based charitable giving such as:
  - In Arab and Muslim communities, sadaqa: voluntary charity, waqf: endowment, and zakat: tithe
  - In the Jewish community, tzedakah: charitable giving, tzedek: justice, and chesed: mercy/kindness
  - In China, haoshi: voluntary charity, cishan: compassion for the poor, shiji: giving aid, or yi: justice
  - In Kenya, harambee: collaboration and mutual aid
  - In South African and Zulu traditions, horizontal philanthropy: the giver and receivers are equals, ubuntu: compassion and humanity, ukwenana: gift without expectation of something in return, ukusisa: the giver lends a piece of property and recipient eventually returns the gift but keeps any byproducts or offspring
As we discuss ways to implement equity and inclusion within an organization you will come across terms that may be new to you. We have compiled a short list of definitions based on what we are discussing within this document. We are using the meanings as defined by *Our Shared Language: Social Justice Glossary* developed by YWCA.

**Bias** An orientation toward something or someone, this orientation can be positive, negative, or neutral; a bias can be informed by a previous experience. In other words, biases can be rational.

**EXAMPLE:** Any distrust of the U.S. Government that Native American communities have could be considered a rational bias rather than prejudice because there are actual historical and contemporary reasons for indigenous people not to trust the government: desecration of sacred land, genocide, forced relocation, biological warfare, and broken treaties to name a few.

**Curb-Cut Effect** Dubbed by Angela Glover Blackwell, founder of PolicyLink, the curb-cut effect is named after the small ramp in the sidewalk intended to help those in wheelchairs. As part of the disability rights movement of the 1960s and 1970s, disability activists pressured the state and federal government to implement curb-cuts in 1972. Once curb-cuts were in place, the nation discovered that the benefits went beyond its originally intended users – helping parents pushing strollers, workers pulling heavy carts, business travelers wheeling luggage, people suffering joint and knee pain, runners, bikers, and others. Rather than seeing equity as a zero-sum game where helping one group hurts another, the curb-cut effect illustrates that when support is given where it is needed most, everyone wins (Dorsey, Bradach, & Kim, 2020).

**Diversity** A variety of things. Recognition of difference alone does not equal justice or inclusion. A diversity focus emphasizes “how many of these” we have in the room, organization, etc. Diversity programs and cultural celebrations/education programs are not equivalent to doing racial justice. It is possible to name, acknowledge, and celebrate diverse cultures without doing anything to transform the institutional or structural systems that produce, and maintain racialized injustices in our communities.

“Diversity is like finally being invited to the dinner and given a seat, but you find out it doesn’t mean you are allowed to speak or will be heard.”

~ Rinku Sen, *Race Forward and Colorlines*
Equity To treat everyone fairly. An equity emphasis seeks to render justice by deeply considering structural factors that benefit some social groups/communities and harms other social groups/communities. Sometimes justice demands, for the purpose of equity, an unequal response.

Equality To treat everyone fairly. An equity emphasis seeks to render justice by deeply considering structural factors that benefit some social groups/communities and harms other social groups/communities. Sometimes justice demands, for the purpose of equity, an unequal response.

Groundwater Metaphor If you have a lake in front of your house and one fish is floating, belly-up, dead it makes sense to analyze the fish. What is wrong with it? But if you go to the same lake and half the fish are floating, belly-up, dead it makes sense to analyze the lake instead. What is happening in the lake system that caused the fish deaths? Imagine if you visit five lakes around your community where at each and every lake, half the fish are floating, belly-up, dead. Then it is time to analyze the groundwater. How did the water in all these lakes end up with the same contamination? While the lakes do not appear to be connected, it is likely that they are, particularly as more than 95% of the freshwater is below the surface in the groundwater. This metaphor was designed to help practitioners internalize the reality that we live in a racially structured society and that causes racial inequity (Love & Hayes-Greene, 2018).

Inclusion 1. An intentional effort to transform the status quo by creating opportunity for those who have been historically marginalized. 2. An inclusion focus emphasizes outcomes of diversity rather than increasing the amount of explicit diversity of people. This automatically creates equity in access/opportunity, or an enhanced organizational climate. 3. Begins with the needs, wants, and quality of life of the historically minoritized population rather than the historically privileged.

To some, inclusion is seen as an alternative to assimilation and differentiation. Assimilation, defined by American sociologist H.G. Duncan, is a process, for the most part conscious, by which individuals and groups come to have sentiments and attitudes similar to those held by other persons or groups in regard to a particular value at a given time. Differentiation, however, is the process by which groups or communities disperse to form separate or distinct societies. While differences may be celebrated within a group, the potential consequences of differentiation are tokenism or exclusion.

Diversity is having a seat at the table, inclusion is having a voice, and belonging is having that voice be heard.”

~ Amanda L. Bonilla, Inclusion Consultant Network

Inclusive Organization 1. An organization that proactively enlists intentional strategies to remove barriers to access, participation, and success of those who were historically or are currently systematically excluded by or marginalized within the organization. 2. An organization that actively seeks the transformation of its organizational policies and practices, to foster the involvement and success of those who have been excluded or marginalized. that produce, and maintain racialized injustices in our communities.
Privilege 1. The unearned social, political, economic, and psychological benefits of membership in a group that has institutional and structural power. 2. Living and existing in a world where standards and rules are premised upon your needs wants and desires. 3. To identify with or be identified as a member of a dominant social group (as opposed to a Minoritized group).

Think about privilege as extra benefits that you receive just for being you, that might include:

- Being able to feel safe in an interaction with law enforcement.
- Being able to learn about your race in school as part of the core curriculum rather than an elective or part of a special month.
- Being able to find children’s books that primarily feature characters of your race or that are written by people from your race
- Being protected from race-based traumatic stress (RBTS)
- Being able to see people of your race represented in positive ways on tv even if they committed a crime.
- Not having to apologize when a person of your race commits a crime or explain that not everyone who looks like you are a “terrorist,” “murderer,” or “bad person.”

Race-Based Traumatic Stress RBTS refers to the mental and emotional injury caused by encounters with racial bias and ethnic discrimination, racism, and hate crimes. An individual that has experienced an emotionally painful, sudden, and uncontrollable racist encounter is at risk of suffering from a race-based traumatic stress injury. In the U.S., Black, Indigenous, and people of color are most vulnerable due to living under a system of white supremacy (Mental Health America, Racial Trauma).

Traumatic stressors may include the indirect traumatic impacts of living with systemic racism and individual racist actions. For example,

- Viewing videos of brutal police killings of Black people can cause RBTS in people who view them.
- Witnessing a violent event, physical assault, or forcible family separation while experiencing a traumatic event, such as migration.
- Historical trauma passed down generationally through families and communities. This may include the chattel enslavement of Africans in the U.S. which makes Black people highly vulnerable to developing mental health disorders. The historical trauma shared by Native Americans including boarding schools, massacres, and forced violent removal from tribal lands represents a communal loss and Native Americans today continue to experience symptoms of depression, substance dependence, diabetes, and unemployment due to the psychological impact of the trauma (Ibid).

Unconscious Bias Unconscious biases, also known as implicit biases, are the underlying attitudes and stereotypes that people unconsciously attribute to another person or group of people that affect how they understand and engage with a person or group (Reiners, 2020). Bias is created and maintained from one’s given privilege.

“The unconscious does a lot of work, it sorts, it creates associations, and it fills in gaps. Many times the way we connect is to say we don’t see differences, we’re all the same in terms of our human value, we are not the same in our human expression.”

~ John A. Powell, HAAS Institute at UC Berkeley School of Law
TYPES OF BIASES THAT COMMONLY AFFECT JOB CANDIDATES AND EMPLOYEES IN THE WORKPLACE INCLUDE:

**Affinity Bias** Also known as similarity bias, in the tendency people have to connect with others who share similar interests, experiences, and backgrounds.

**Confirmation Bias** The inclination to draw conclusions about a situation or person based on your personal desires, beliefs, and prejudices rather than on unbiased merit.

**Attribution Bias** A phenomenon where you try to make sense of or judge a person’s behavior based on prior observations and interactions you have had with that individual that make up your perception of them.

**Conformity Bias** The tendency to act similarly to the people around you regardless of your own personal beliefs or idiosyncrasies. This may also be considered peer pressure.

**Gender Bias** The tendency to prefer one gender over another gender.

**Ageism** The tendency to have negative feelings about another person based on their age.

**Name Bias** To judge and prefer people with certain types of names, primarily names that are of Anglo or European origin.

**Beauty Bias** The belief that attractive people are more successful, competent, and qualified.

---

**DISCUSSION QUESTIONS**

1. **What words or phrases stood out to you?**

2. **What terms and concepts resonated with you?**

3. **What, if anything, surprised you?**

4. **What new or enhanced understanding do you have because of this information?**

5. **How will actively using these terms and concepts make a difference in our organization?**

6. **What organization documents or language do we need to review and possibly revise?**

---

“We are asked to compartmentalize our identity, to check our trauma, and question our own corazón wisdom... and then we are exploited — our hearts and ideas extracted from us while those with the most privilege design the organization and the Board.” ~ Lupe Poblano, CompassPoint
FOUR LEVELS OF RACISM

Social change is impossible until we address the fact that leaders must comprehend the four levels of racism as well as their own roles in perpetuating structural racism. Leaders must learn the history and context of structural racism in the U.S. and listen to lived experiences about how it affects BIPOC communities. This can be accomplished by:

- Listening to the lived experiences of individuals without requiring them to justify the validity of those experiences on them
- Reflect on the role leaders and organizations play in perpetuating structural racism
- Examine the effects of implicit bias on organizational development
- Examine the effects within their own organizations, and engage in equity initiatives that dismantle the dominant culture and structural racism (Suarez, 2018).

The definitions we use for the four levels of racism are defined by Kerrien Suarez, Director of Equity in the Center, in her article, The Role of Senior Leaders in Building a Race Equity Culture.
It may be difficult to detect racism inside a complex system because at first it seems like it comes from individuals – if we can change individual actions then we should be able to eliminate racism, right?

**Ways we know systemic racism is real:**

1. White families hold 90% of the national wealth in the U.S., Latinx families hold 2.3%, and Black families hold 2.6 percent. (The American Prospect, September 2014).

2. Unemployment of Black individuals is consistently two times that of whites over the past 60 years, no matter what has been occurring with the economy (Pew Research, August 2013).

3. Black children constitute 18% of preschoolers nationwide but make up nearly 50% of suspensions. When all age groups are examined, Black students are three times more likely to be suspended than white students, even when their infractions are similar (Ben & Jerry’s, 2016).

4. Black people are more likely than white Americans to be arrested; once arrested, they are more likely to be convicted; and once convicted, they are more likely to experience lengthy prison sentences. While Black people make up 13% of the U.S. population, they represent 40% of the prison population. As of 2001, one of every three Black boys born in that year could expect to go to prison in his lifetime (The Sentencing Project, 2018).

5. Overall, people of color are more likely to be incarcerated than White Americans. Black people are 5.9 times more likely, Native Americans are 3.1 times more likely, Latinx people are 3.1 times more likely to go to prison than Whites (Ibid).

6. Black business owners are 5.2 times more likely to be denied a loan. Modern-day redlining persists in 61 metro areas even when controlling for applicants’ income, loan amount, and neighborhood (Dorsey, Bradach, & Kim, 2020).

**DISCUSSION QUESTIONS**

1. **Which statements or points in this section caught your attention?**

2. **Which levels of racism did you expect to see?**

3. **Which levels were unexpected?**

4. **Which levels of racism concern you the most?**

5. **What situations related to one of these levels of racism have you observed or experienced, within or outside of our organization?**

6. **What assumptions, policies, practices, and systems in our organization do we need to examine?**
Patricia Bradshaw and Christopher Fredette developed a typology of inclusion based on interviews they conducted across the nonprofit sector in Canada. They interviewed 18 board members who were viewed by their Canadian peers to be leaders in the effort to diversify boards. Rather than focus on diversity and the dynamics of exclusion, practitioners were talking about inclusion. Bradshaw and Fredette came to develop a typology of inclusion that identified four types of inclusion on a low to high scale of both functional and social inclusion. This chart was designed based on how these individuals made sense of diversity and what they saw as best practices for enhancing it (Bradshaw & Fredette, 2012).

**Functional Inclusion** Functional inclusion is characterized as goal driven and committed to purposeful strategies for the increased inclusion of individuals who identify as coming from diverse or traditionally marginalized communities. This may include board policies addressing inclusion, practices to enhance inclusion, recruitment practices to attract diversity, and an intentional board structure.

**Social Inclusion** Social inclusion is characterized as the participation of members of diverse groups in the interpersonal dynamics and cultural fabric of the board based on meaningful, relational connections. Although the process of becoming socially included may not be automatic, it is an essential facet of genuine member integration. Individuals interviewed from traditionally underserved communities shared how they used humor to overcome tension, how they worked to build relationships, and how they were conscious of the need to build trust.

**Transformational Inclusion** Bradshaw and Fredette use the concept of baking a cake to describe diversity, inclusion, and transformational inclusion. The relationship between traditionally underserved individuals and the boardroom can be compared metaphorically to an egg used in the baking of a cake. Visualize a child helping their father make a cake, first by mixing the dry ingredients together and then adding an egg from the carton by placing it whole into the bowl and starting to stir. The father points out that the egg must be broken, and the mixture transformed before it is ready for the oven. The unbroken egg represents diversity in its simplest form of representation. The dry ingredients, once combined with the broken egg, become impossible to separate into their original forms thereby representing inclusion. The final step, impacting the cake batter through the heat of the oven to become a cake, is the theory of transformational inclusivity. Each step builds on the other in order to create a cake, neither is sufficient on its own (Bradshaw & Fredette, 2012).
In just a few sentences, Bradshaw and Fredette eloquently sum up what this transformation process looks like for organizations:

“Traditional views of diversity stress the benefits attributable to representation – like the unbroken egg placed carefully into the bowl. Missing from those perspectives is a discourse recognizing the transformative implications of making the egg into the otherwise dry batter, where both are irrevocably changed, and it becomes impossible to separate out the various ingredients into their original forms. Also missing is the recognition that just as the cake batter is impacted by the heat in the oven, so are the changing expectations of funders, members, clients, and the public at large, who are turning up the heat on nonprofit boards and demanding that they be more representative of their communities.”

**DISCUSSION QUESTIONS**

1. What components of the “Typology of Inclusion” matrix caught your eye?
2. What interests you about this method for enhancing inclusion?
3. What worries you?
4. What questions does this Typology of Inclusion raise for us?
5. What changes would its implementation require of us?
6. What do we need to do to ensure high functional and social inclusion?
Culture shapes how we perceive ourselves and interact with the world. In this next section, we will determine how your organization’s systems, structures, and processes are biased toward dominant culture. These assessment tools will enable your organization to assess its capabilities by

- Conducting an overview of the organization’s strategic priorities, challenges, and current approaches to inclusion and diversity.
- Gathering feedback from stakeholders about the successes and challenges of current practices.
- Assessing perceived barriers that would inhibit future equity and inclusion practices.
- Completing a self-assessment of the board’s equity and inclusion responsibilities and determining if they are below, meeting, or exceeding expectations.

Organizational Readiness Assessment
Equity and Inclusion Self-Assessment
Board Recruitment Profile

Organizational Readiness Assessment
Equity and Inclusion Self-Assessment
Board Recruitment Profile

The Denver Foundation’s Inclusiveness Project (www.nonprofitinclusiveness.org) supports organizations doing inclusiveness work. They developed the following pre-test to determine if your organization is ready to commit to an in-depth, extended DEIA process. The pre-test was designed to be completed by an organization’s executive director, board chair, or other senior staff or board leadership. The questions will rely on your impressions and opinions which may not be the same as those of other members of your organization. It may be helpful for other individuals within the organization to discuss the answers after taking the pre-test before starting your inclusiveness work.
1. Which of the following best summarizes your organization's focus on inclusiveness/diversity? (select one)
   a. We are primarily interested in having more staff and/or board members of color.
   b. We are interested in incorporating inclusiveness into all that we do — changing the way our organization meets its mission, our culture, and environment related to race and ethnicity, and how we recruit and retain people of color as board, staff, volunteers, and clients.
   c. We are primarily interested in improving our services/reaching out to clients of color.

2. Based on your knowledge, which of the following statements would best characterize your CEO or executive director's approach to inclusiveness? (select one)
   a. Inclusiveness matters, but we have other priorities to focus on right now (fundraising, strategic plan, capital campaign, etc.).
   b. They would go along with an inclusiveness initiative if the board or a major funder strongly recommended it.
   c. Our organization should not take race or ethnicity into account in any area of our work.
   d. Being inclusive is simply the right thing to do.
   e. Inclusiveness will help our organization raise more money.
   f. Inclusiveness will help us better meet our mission by raising more funds, improving services and programs, and better meeting the needs of our community.
   g. Our organization should become more diverse to respond to community pressure or expectations.

3. Based on your knowledge, which of the following statements would best characterize the approach of your board of directors to inclusiveness? (select one)
   a. Our board thinks inclusiveness is generally a good thing.
   b. Many members of our board strongly believe being more inclusive would help us better meet our mission and they regularly raise issues related to race and ethnicity (e.g. when discussing program policies, suggesting training for the board, etc.).
   c. Most members of our board prefer we not take race or ethnicity into account in any area of our work.
   d. Our board does not seem to have strong positive or negative feelings about inclusiveness.

4. Current organization focus/priorities: (check all that apply)
   - Our organization is amid (or about to embark on) a major capital campaign.
   - Our organization is in the process of a leadership transition at the ED level.
   - Our organization is currently addressing a crisis (i.e., loss of a major funder, major influx of clients, federal or state funding cuts, etc.).
   - Our organization is amid a major reorganization.

5. The level of resources you believe your organization can commit to an inclusiveness initiative: (select one)
   a. We have (or can access through funders) funds available ($3,000+) and are able to make inclusiveness a priority for our staff and board’s time and energy right now.
   b. We can make inclusiveness a priority for our staff and board’s time, but we do not have funds available.
   c. We have funds available ($3,000+), but we have other priorities right now.

6. The kind of work your organization would be willing to engage in for an inclusiveness initiative: (select one)
   a. Diversity/inclusiveness training about culture, diversity, race relations, and/or racism.
   b. Organizational assessment that provides information about our work in relation to race and ethnicity and which provides information to help create a DEIA strategic plan.
   c. Both of the above
EXPLORATION

ANSWER KEY
Convert your answers to numbers.

QUESTION 1:
a = 3, b = 6, c = 4

QUESTION 2:
a = 1, b = 2, c = 0, d = 3, e = 2, f = 4, g = 2

QUESTION 3:
a = 3, b = 4, c = 0, d = 2

QUESTION 4:
Subtract four points from the total score for each line checked.

QUESTION 5:
a = 3, b = 2, c = 1

QUESTION 6:
a = 1, b = 3, c = 5

TOTAL 14-21: Good fit  Your organization is probably ready to consider a comprehensive initiative.

TOTAL 8-13: Moderate fit  Your organization may wish to start more gradually by focusing on specific pieces of inclusiveness. Your organization may wish to take six months to a year to plan for a comprehensive initiative.

TOTAL 0-7: Not a good fit currently  The comprehensive initiative process is likely not a good fit for your organization’s current interests and resources. If your organization is primarily interested in diversity rather than inclusiveness, your executive director or board members do not have a strong, deep commitment to an inclusiveness initiative, there are competing initiatives that require a great deal of time or energy, the organization does not have adequate resources for six to 18 months of work, or the organization is not able to commit to both organizational development and inclusiveness training then this may not be a good fit at this time.

These additional qualities are helpful as your organization considers starting the inclusiveness initiative process:

- Open to feedback about the organization’s work.
- Expectation that this work will include difficulty and discomfort.
- Strong internal and external communication systems, both formal and informal.
- Organization’s ability to change.
- Conflict-resolution skills within the organization.
- An internal culture of respect.
- A belief in the value of differences.
- A belief that race and culture matter in the delivery of services.
- Ability to set and reach goals and objectives.
- Ability to track, measure, and evaluate progress.

DISCUSSION QUESTIONS

1. What is the first thing you noticed about your collective responses to the assessment?

2. What surprised you about the readiness category you landed in?

3. What, if anything, concerns you about the category?

4. What are the implications of this category for your organization?

5. What do you need to do next?
### EQUITY AND INCLUSION SELF-ASSESSMENT TOOL

There is a wide array of board self-assessment tools available that identify the board’s performance, ability to meet its short and medium-term goals, and the organization's capacity to support board effectiveness. This tool, developed by Talem Consulting, is based on group, staff engagement, and individual board member priorities as it relates to equity and inclusion.

<table>
<thead>
<tr>
<th>Board Performance</th>
<th>Not Able to Observe</th>
<th>Below Expectations</th>
<th>Meeting Expectations</th>
<th>Exceeding Expectations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Board members racial/ethnic and other personal identities align with organization’s defined community</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Board members actively move the mission and vision statements forward using an inclusive lens</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Board members evaluate board policies, procedures, and governance every 12 months using an equity/inclusion lens</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Board members understand the key equity and inclusion measures and metrics needed to assess organizational success</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Board members consider equity and inclusion in discussions, strategy, and decision-making</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Board members participate in semi-annual opportunities to increase knowledge about equity and inclusion</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Board members understand the defined community which receive the organization’s services</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Board members identify equity and inclusion opportunities that will help the organization achieve its strategic priorities</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Board members respect and recognize socio-cultural identities of other members and value the skill, knowledge, and experience they bring to discussions</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Board members work effectively with fellow directors through open communication, consensus building, and managing conflict constructively</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Board members actively help overcome potential barriers to board participation (e.g. childcare, days/times/locations of meetings, avoiding unscheduled meetings or phone calls, access to transportation, halal/kosher/vegetarian meal options, etc.)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>When vacancies occur on the board, there is an adequate process for the board to identify skills/experience/identities for new members</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Committees clearly understand their duties and responsibilities through an equity and inclusion lens</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>When board members are unable to participate in person there are standard communication norms that are upheld consistently (e.g. identification of speaker, wait time between member comments, holding space for the non-present board members questions and comments)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Board members welcome feedback from clients and stakeholders to improve equity and inclusion practices</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Board members show openness to learning about the cultural norms of diverse racial/ethnic groups and are reasonably knowledgeable about racial/ethnic issues involved in their board work</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The board sets high standards of performance for all members regardless of personal identities</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### RELATIONSHIP WITH STAFF LEADERSHIP

<table>
<thead>
<tr>
<th>Indicators</th>
<th>Not Able to Observe</th>
<th>Below Expectations</th>
<th>Meeting Expectations</th>
<th>Exceeding Expectations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staff is responsive to appropriate advice and counsel from the Board relating to equity and inclusion practices</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The board is kept informed on material issues that impact diversity, equity, inclusion, and accessibility</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The allocation of responsibilities between staff and the board is appropriate, well understood, and maintains a healthy power balance</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The board feels free to challenge the CEO/ED when appropriate</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The CEO/ED is held accountable for achieving equity and inclusion throughout the organization</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### INDIVIDUAL PERFORMANCE

<table>
<thead>
<tr>
<th>Indicators</th>
<th>Not Able to Observe</th>
<th>Below Expectations</th>
<th>Meeting Expectations</th>
<th>Exceeding Expectations</th>
</tr>
</thead>
<tbody>
<tr>
<td>I am aware of the organization’s equity and inclusion policies as it relates to my role supporting the mission and vision</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I am familiar with the organization’s by-laws and governing policies and how they incorporate equity and inclusion</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I encourage other board members to express their opinions at board members</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I am a good listener at board meetings</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I follow through on things I said I would do</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>When I have a different opinion than the plurality, I raise it</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I support board decisions once they are made even if I do not agree with them</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I stay informed about equity and inclusion issues relevant to our mission and bring that information to the attention of the board</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I practice the values that the organization promotes</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The board sets high standards of performance for all members regardless of personal identities</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### DISCUSSION QUESTIONS

1. What did you notice about your self-assessment results?
2. Which of the performance indicators did you expect to fall below expectations?
3. Which of the indicators did you expect to meet or exceed expectations?
4. Which of the indicators will be the most important to work toward first?
5. How might you get started?
BOARD RECRUITMENT PROFILE

When developing a personal board recruitment profile acknowledge how criteria may create a barrier to participation for individuals who come from diverse socio-cultural backgrounds. Building an understanding of how access to knowledge, skills, and experience vary depending on personal identities can help ensure that the process is inclusive and equitable. Furthermore, as you determine characteristics of diversity – consider how you select high-priority identities so as not to take too narrow of a view or reduce a person to a single characterization rather than full personhood.

Potential disparities and barriers to board participation include:

1. Age bias valuing the experience of older board members over that of young people (aged 18-40).

2. Limited or no accessibility and accommodations for people with disabilities such as virtual meeting options for those who are unable to travel, accessibility accommodations at meetings (e.g. sign language interpreter, wheelchair friendly spaces), accommodations across organizational materials (e.g. image descriptors or video captioning on social media/website).

3. Language barriers at organizations conducting business only in English even if the community served speaks other languages.

4. Lack of formal education/training or undue weight on specific experiences valued over cumulative life experience.

5. Socio-economic accessibility and accommodations such as lack of transportation to meetings or events, inability to reliably access phone/internet services for board communications, jobs that require shiftwork and no standard schedule limiting the ability to attend meetings or events, financial obligations to purchase tickets/table to fundraising events, and annual financial donation requirements.

6. Paternalism and power differentials between board members during a selection or appointment process tokenizes candidates based on their identity characteristics (e.g. nonprofit program participant board seats, board seats based on corporate giving, entitlement based on annual financial giving).

7. Time obligations such as in-person requirements for meetings, meeting preparation, committee service, participation in orientation/educational/strategic planning sessions, event attendance, and special initiatives on behalf of the organization.

8. Reference, background, or credit check procedures that may disqualify people with lower credit scores, limited community connections, or who have dealt with law enforcement.
<table>
<thead>
<tr>
<th>Board Recruitment Criteria</th>
<th>Incumbent Directors</th>
<th>Prospective Directors</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td><strong>PERSONAL SOCIO-CULTURAL IDENTITY</strong>*</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gender Identity (male, female, non-conforming, non-binary, trans)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cultural Identity/Heritage</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Racial/Ethnic Identity</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Geography</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Languages</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Youth, Early-career, Mid-career, Late-career, Retiree, Senior</td>
<td></td>
<td></td>
</tr>
<tr>
<td>LGBTQIA2S Identity</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Citizenship Status: Undocumented, New American, Naturalized, Permanent Resident, First/Second/Third Generation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Educational Attainment (diplomas, degrees, technical licenses, etc.)</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>DESIRED EXPERIENCES</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Current or former organizational stakeholder (board member, staff member, volunteer, donor, client, community partner, groups served by organization not accessing services, leaders from nonprofit/public/private sectors)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Personal experience dealing with the organization’s mission area</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Relationship with targeted communities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Strong affinity and commitment to the organization</td>
<td></td>
<td></td>
</tr>
<tr>
<td>General board experience</td>
<td></td>
<td></td>
</tr>
<tr>
<td>History of formal/informal personal philanthropy (giving to family/friends, remittances, mutual aid, giving circles, emergency aid, faith and faith-based institutions, cultural/social organizations, professional associations, tribes/tribal organizations, community organizations/funds, civil rights/social justice organizations, cultural/community centers, health clinics, historically black/tribal colleges)</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>DESIRED SKILLS</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Facilitation and consensus-building</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Empathy for fellow board members</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Coaching and feedback providing</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Forward looking perspective and clear strategic vision</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Capacity to understand complex issues</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Crisis management</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Strategic Planning</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Board Recruitment Criteria

<table>
<thead>
<tr>
<th>DESIRED KNOWLEDGE</th>
<th>Incumbent Directors</th>
<th>Prospective Directors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounting/Audit</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Advocacy/Communications</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Funds Development</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Community Relations</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Government/Public Sector Relations</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Human Resources/Performance Management</td>
<td></td>
<td></td>
</tr>
<tr>
<td>IT/E-Commerce/Privacy management</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Legal/Regulatory</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Marketing/Sales</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Member Relations</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Risks and Controls</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Resource/Project Management</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*There are numerous identities that can be included here; this section should be edited to highlight identities that are unique within the community your organization serves.

### Discussion Questions

1. Which of the potential disparities caught your attention?

2. What concerns, if any, do you have about using a board profile in your recruitment process?

3. What do you like about using recruitment criteria and a board profile to start the board recruitment process?

4. If you created or revised the profile, would it make a difference for board members recruited with this tool?

5. What significant would creating or using a profile have for your organization?

6. What specific recruitment criteria do you want to use in – or add to - your board profile?
Moving toward a more equitable and inclusive organization is a personalized journey for each workplace. A challenge for organizations is the search for sound principles to frame board responsibilities and organizational strategy. More than 1 in 4 people of color (26%) believe that Black, Indigenous, and people of color (BIPOC people) must work harder than Whites for their contributions to be recognized, as compared to 3% of Whites who believe the same thing (Job Satisfaction and Race-related Discrimination and Conflict in the Workplace, Katherine Pease, 2007).

Social change is possible only when we address each level of racism and our own roles in perpetuating racism. In this section, each level of racism – personal, interpersonal, structural, and institutional – has its own action planning strategies and suggestions. As your organization looks to increase diversity and inclusion, it must consider the following as part of its movement toward a more inclusive and equity-focused board culture.
**INDIVIDUAL**

**DEFINITION** Private beliefs, prejudices, and ideas that individuals have about the superiority of Whites and the inferiority of people of color. Among people of color, it manifests as internalized oppression. Among Whites, it manifests as internalized racial superiority.

Discrimination can be implicit (unintentional based on hidden biases) or explicit (intentional based on personal beliefs) and it is important to address both aspects. Your organization may be able to reduce explicit discrimination through anti-discrimination policies, mandatory anti-racism training, progressive discipline policies, or termination of employment. However, it is much more difficult to eliminate implicit discrimination. This form of discrimination may look like failing to extend invitations to participate in networking opportunities, overlooking or discrediting the contributions of BIPOC employees, or requesting unpaid labor outside of a person’s job description so you may better “understand” their identity.

**Individual Learning**

- Understand America’s history with racism, White culture, and its harms.
- Build a shared vocabulary, definitions, and analysis to ground your organization’s conversations. Require new board members to complete this training within their first 90 days with the organization.
- Interrogate personal biases and why they exist within you through reading and continued education.
- Build empathy and respect for others by rethinking how you listen, master the art of asking questions, approach a situation from the other person’s perspective, and avoid making assumptions.
- Get comfortable with vulnerability by prioritizing team-building and positive workplace relationships.
- Provide safe spaces for individuals to discuss their learning in conversation such as external affinity groups.
- Name avoidance strategies that limit what issues are “legitimate” to talk about. For instance, when you see this happening in a meeting, you can state, “I think this is what is happening right now” to give board members license to continue with challenging conversations and making it clear everyone else is expected to do the same.
- When harm takes place, have an accountability process in place for employees, board, volunteers, and participants to learn from their mistakes.

**Individual Network Expansion** According to the American Values Survey, 75% of White people have entirely White social networks. Consequently, BIPOC individuals have less access to social networks that enable connections to the philanthropic community. This lack of access to individuals in leadership or decision-making positions has a lasting impact on the number of people of color who are tapped for board leadership roles. While there is a substantial pipeline of people of color for board positions, organizations and their current social networks are not in touch with those individuals. The best way to overcome this is to diversify sourcing pools to move toward a more racially diverse pipeline of board candidates.

Common sourcing channels include recommendations from peers, reaching out to racial equity experts, scanning conference attendees, identity-based professional associations, and online professional channels like LinkedIn, Idealist, Catchafire, among others (Dorsey, Bradach, & Kim, 2020).

**When considering sourcing methods, ask:**

1. Does a source prioritize DEIA?
2. Have certain source channels given rise to a more racially diverse pool than others?
3. Are filters applied that would disproportionately exclude people of color?
**INTERPERSONAL**

**DEFINITION** The expression of racism between individuals. It occurs when individuals interact, and their private beliefs affect their interactions.

Interpersonal bias can manifest as mistrust and microaggressions which inhibit relationship building and emotionally burden people of color (Dorsey, Bradach, & Kim, 2020). Unconscious bias is a part of life and affects BIPOC people differently, particularly if they have intersecting identities that may have multiple aspects of implicit bias (e.g., racism, sexism, classism, or all three). To combat implicit interpersonal bias, incorporate rapport-building activities as part of the board’s required activities.

**Rapport Building Activities**

I. Explore and encourage board members to share their personal identities that relate to the work they are doing on behalf of the organization.
   a. Create activities that help board members talk about and feel pride in themselves and their unique experiences that benefit the organization and its mission.
   b. Encourage all aspects of a board member’s individuality giving them a safe space to be themselves.
   c. Maintain a respectful environment that considers explicit and implicit language and behaviors. Work with members so they learn to disagree respectfully and not shy away from conflicting ideas as divergent points of view can deepen their understanding of the organization, its mission, and its programming.

II. Incorporate explicit education on the history of institutionalized inequity and how it specifically impacts the community your organization serves.
   a. Do not be afraid to talk about stereotypes that plague the communities your organization serves. Guide members in understanding that this inequity is not everyone’s fault, but it is everyone’s responsibility to become aware and create fair and equitable opportunities.
   b. Develop dialogue and reflection around these issues so that members can identify, “Why do I feel this way? Where did I learn this misinformation? How can I incorporate and act upon this new information?”

III. Incorporate cultural and religious traditions into board practices.
   a. Be mindful of who is in the boardroom so that practices can be more culturally relevant.
   b. Do not assume that members have access to family history or that it is a topic with which the individual wants to share.

**Relationship Management**

Even when a nonprofit has identified and onboarded new board members, building a board culture of mutual respect and trust is difficult. Strains can develop if board members of color and White board members are not aligned on strategic intentions or priorities. White board members may be blind to the barriers facing service communities and the board members of color must take on the responsibility of educating their peers.

**Boards should consider:**

- Treating all board members like peers to reduce power imbalances.
- Setting policies that maintain a safe space to discuss issues and support board members of color expressing honest feedback and dissenting opinions.
- Supportive activities to combat burnout from cultural ignorance, microaggressions, or racism.
- Retreats and workshops that challenge comfort zones and deeply rooted cultural norms, structures, and biases.
- Using humor to overcome tension while being cognizant of the harm that humor can cause in devaluing a person’s contribution or potential for implicit bias or microaggressions in jokes.
- Mentorship to support members in their anti-racism, equity, and inclusion journey.
- Incorporating inclusion and accessibility principles in meeting planning (timing, location, access based on physical ability, language interpretation, etc.).
- Accommodating board members at meetings and events by considering religious holidays during scheduling, dietary restrictions, and cultural preferences.
- Sensitivity to all intersecting identities and how conversations can create “otherization,” exhibit class and other implicit privilege (e.g., discussing sports teams, summer homes, overseas vacations, etc.).
INSTITUTIONAL

**DEFINITION** Discriminatory treatment, unfair policies and practices, inequitable opportunities and impacts within organizations and institutions, based on race, that routinely produce racially inequitable outcomes for people of color and advantages for White people. Individuals within institutions take on the power of the institution when they reinforce racial inequities.

Typically, what we value enough to measure, gets done. If you are keeping track of something, then it is probably important... right? The process of identifying the right metrics and reports to measure and communicate is more complex – especially when it comes to finding metrics to drive equity and inclusion and remove unfair policies and practices.

A 2020 report on racial equity and philanthropy by Echoing Green and The Bridgespan Group uses KABOOM! as an example to describe how developing solutions, metrics, and KPIs without an equity-based lens will bring you the wrong answer. KABOOM! started by coordinating volunteers and corporate sponsors to build new community playgrounds. In 2005, it took the process online increasing the number of playgrounds it could build by a factor of ten as online tools helped communities self-organize and build playgrounds of their own. By 2012, KABOOM! helped build 13,000 playgrounds. While this growth gained national attention and acclaim, founder Darrell Hammon, admitted when the organization “peeled back the onion” its “race-neutral” online platform meant growth came from playgrounds in middle- and upper-class White communities and not the target audience of children experiencing poverty. Hammond notes that the data, dashboards, and measurements were not enough since the organization was not asking the right questions or understanding the nuance of the numbers. KABOOM! had to pivot and change its focus if it was going to reach children in low-income urban areas. Ultimately, KABOOM! ended its online platform and refocused their efforts on increasing playability in cities by partnering with municipalities and providing infrastructure grants to create play areas near everyday spaces like bus stops and laundromats.
To build an organizational culture, starting with board leadership, that embraces inclusion and dismantles inequity within existing systems, an organization must:

Define your focus

- Clarify the definition of your community. Where are the geographical boundaries, keeping in mind that the U.S. Census tracks information by block, urban area, ZIP code, metropolitan statistical area, county, and state?
- Analyze the community your organization serves to gain an in-depth understanding of its households. What is the racial/ethnic breakdown? Income levels? Percentage of Immigrant, undocumented, and U.S. born individuals? Past and projected demographic changes? Languages spoken?

Embed an inclusive mindset

- Embed explicit consideration of inclusion in board strategy, decision-making, and problem-solving.
- Regularly look at board policies, procedures, and governance through an inclusion lens.
- Regularly challenge assumptions and mindsets of board members.
- Promote intra-board solidarity through mutual respect and recognition.
- Understand how socio-cultural factors and power structures impact board culture to ensure there is a reciprocal understanding that actively invites, supports, and empowers all members to voice their viewpoints, ideas, and opinions.
- Acknowledge disparities persist in society around issues such as educational achievement, health outcomes, and economic stability for underserved populations. Understand these disparities impact the experience people of color have in the workplace, accessing services, and participating in leadership roles.
- Enable collective decision making that encourages those from historically oppressed communities to share their input in major decisions. This can be accomplished by bridging the gap between board and staff by allowing them to hear from each other on a regular basis.

Align with organizational strategy

- Determine how equity and inclusiveness advances the mission of the organization.
- Look at previous strategic priorities, determine how inclusion will deliver improved access and quality to your services, reduce inequities for your participants, and improve engagement and involvement with your community stakeholders.

Imagine the bigger picture

- How might your mission statement change to reflect a greater commitment to inclusiveness?
- How might programs and the program beneficiaries change as your organization becomes more inclusive?
- How might equity and inclusion practices impact the future composition of staff, volunteers, and donors?
- How might operations (hiring, policies, procedures, etc.) change with a shift in organizational culture?
- How might inclusivity impact how you engage with community members through fundraising, marketing, and communications?

Embed an inclusive mindset

- Develop concrete, actionable goals and assign accountability.
- Work to mitigate experiences and perceptions of inequity.
- Embed explicit consideration of inclusion in current assessment tools (e.g., while participatory decision making and cooperative leadership may be an organizational value – how is that reflected in performance evaluations, pay, and bonus/raise structures beyond annual results?)
Within benchmarking, consider how diversity and equity values can be incorporated into board committee goals:

- Percentage of turnover among board and staff members with a racial/ethnic and cultural/social breakdown
- Board and staff member engagement methods and satisfaction rate
- Policies and procedures updated annually using an equity and inclusion lens
- Review of financial management procedures and investment strategies that focus on social justice by divesting from companies who do not support worker/corporate equity
- Crisis management and physical security plans that acknowledge the harm created by law enforcement on the communities served
- Communications strategies that incorporate culturally responsive language and eliminate storytelling centering whiteness and privilege
- Donor growth and retention rates in non-White communities
- Beneficiary satisfaction rate

Create safeguards that enable the organization to assess mid-process if equity and inclusion are being achieved or if there is an unseen barrier or issue impacting the process:

- Check the identity breakdown of prospective board member pipeline throughout the board selection process

Identify action steps to ensure success for process goals:

- How many source channels will the board use to recruit potential board members?
- How many board candidates must there be in the pipeline per board position?
- How many formal and informal activities will the organization plan to help sustain relationships? (e.g., dinners, offline communications, retreats)
- What steps will be taken to ensure accessibility of meetings and communications?
- What constitutes fulfillment of board position requirements for directors (e.g., attendance, preparation, participation, understanding of role)

Develop qualitative as well as quantitative goals:

- Quality of board meetings, workshops, and activities
- Behavior of members toward the group and individuals
- Attitudes of the CEO/ED and other reporting staff toward governance
- Relationship between the CEO/ED and the board as well as the CEO/ED and the board chair
- Board’s relationship with staff and staff presentations
- Board’s relationships with stakeholders (clients, funders, members, partners, etc.)
- Board’s individual contribution of skills and experience for which they were selected
- Board’s personal qualities and behavioral skills that contribute to the effectiveness of the board

“Those who practice leadership for equity must confront, disappoint, and dismantle and at the same time energize, inspire, and empower!”

~ Sharon Daloz Parks, Whidbey Institute
STRUCTURAL

DEFINITION A system in which public policies, institutional practices, cultural representations, and other norms work in various, often reinforcing ways to perpetuate racial group inequality. It is racial bias among institutions and across society. It involves the cumulative and compounding effects of an array of societal factors including the history, culture, ideology, and interactions of institutions and policies that systematically privilege White people and disadvantage people of color.

The nonprofit sector must change if it wants to remain relevant. In the late 1800s, wealthy corporate leaders set the direction of modern American philanthropy. Andrew Carnegie, John D. Rockefeller, Henry Ford, and Margaret Olivia Slocum Sage, who made their wealth in steel, oil, railroad, telegraph, and automobile industries set up some of the first foundations in the country. Charitable giving grew after 1917 when legislation passed that allowed Americans to take tax deductions for their charitable gifts to avoid personal income tax laws passed four years earlier. These first foundations purported to serve “disadvantaged communities” though their wealth was gained through cutthroat business practices, union busting, low wages, and poor working conditions for employees. As one steel worker is purported to ask, “After working 12 hours, how can a man go to a library?” in response to Andrew Carnegie’s philanthropy that established more than 2,500 public libraries around the world.

While the nonprofit sector has presented itself as a people-centered, equity-driven alternative to corporations, the sector reported 1.54 million registered nonprofit organizations in the U.S. Nonprofits reporting to the IRS identified $2.62 trillion in revenues and $5.99 trillion in assets in 2016. The Foundation Center estimates there were 86,125 grantmaking foundations in the U.S. in 2017 whose grants totaled $77.7 billion and assets of $1,012.9 billion (National Center for Charitable Statistics, 2019). This wealth is primarily controlled by White people who hold positions of power in nonprofit and philanthropic organizations. Rather than placing our trust and resources in the communities who need it most, the nonprofit industry as a collective prioritizes White leadership.

To realize structural change in the nonprofit sector we must rethink who holds the power, who controls the money, and who controls the inner workings of organizations affecting Black and Brown lives.

This means:

- Redistributing power and resources to individuals and communities most affected by injustice.
- Moving toward decentralized, team-based organizations that reinforce community-led problem solving, decision making, and teamwork.
- Creating a culture of trust that eliminates White gatekeepers in preference of BIPOC leaders who are building meaningful solutions to issues in their own community.
- Requiring charitable trusts and endowments to spend their assets on charitable giving rather than prioritizing asset growth which ultimately benefits corporate trustees, family members of the original philanthropic donor, or foundation trustees and employees.
- Prioritizing collective impact nonprofit approaches that are community-led and work toward a goal of obsolescence.
- Reevaluating U.S. tax code that allows foundations and charitable trusts to shelter income and consolidate power among the wealthiest Americans.
- Re-designing U.S. tax code on inheritances, estates, and capital income as well as setting higher tax rates for the wealthiest Americans and U.S. companies.
In recent years, as DEIA has become more accepted and widespread, organizations have used a color-blind approach. However, colorblindness means you cannot make meaningful progress to correct inequities because you cannot address what you are unwilling to see. “Saying you are colorblind robs groups of their identity, experience, plight, beauty and strength,” says Autumn McDonald, head of New America CA. Like the groundwater metaphor, we must imagine how the social issues our organizations work to correct are shaped and determined by race, ethnicity, and other intersecting identities.

This is not a one size fits all process. Nor can it be implemented and ignored. The process must be directed and intentional to re-evaluate what solutions look like and from who and where they come from. This process should be started with the unequivocal support of the board of directors who are responsible for the organization’s strategic vision and sustainability. It will be a tough shift that will challenge comfort zones, privilege, and biases. Listening, learning, and prioritizing diverse voices alongside creating an equitable and inclusive culture is critical to changemaking.

As you move through this work, accept that mistakes will and should happen. A culture of perfection does not allow for growth and limits an organization’s capacity for resilience. Acknowledging painful mistakes, making amends, and learning from them without resorting to shame or blame is not easy. However, research shows organizations with a tolerance for failure and setbacks can openly discuss the issues and ultimately learn from them.

“Do the best you can until you know better. Then when you know better, do better”

~ Maya Angelou
**RESOURCE MATERIALS**

- **7 Ways We Know Systemic Racism is Real**, Ben and Jerry’s, 2016. Source URL: [1](https://www.mhanational.org/racial-trauma).
- **20 Questions Directors of Not-For-Profit Organizations Should Ask about Board Recruitment, Development, and Assessment**, by Dr. Richard Leblanc and Hugh Lindsay, Chartered Accountants of Canada, 2010.
- **Racial Trauma, Mental Health America**. Source URL: [https://www.mhanational.org/racial-trauma](https://www.mhanational.org/racial-trauma).
- **Visualizing Greater Inclusiveness** worksheet, by The Denver Foundation’s Inclusiveness Project, Source URL: [http://nonprofitinclusiveness.org/visualizing-greater-inclusiveness](http://nonprofitinclusiveness.org/visualizing-greater-inclusiveness).
Finding the philanthropic counsel you need to support your equity and inclusion journey

If you are ready to have a conversation about building an inclusive board culture, Talem is here to help. We have extensive experience working with organizations that serve communities of color, immigrants, refugees, religious minorities, and other impacted communities. Our team provides board development training, 1:1 coaching and support to help board members move toward more inclusive, culturally aware leadership, fundraising, and engagement practices through virtual workshops.

Issues we address include:

- Incorporating diversity, inclusivity, equity, and accessibility into board recruitment processes
- Hiring and retaining diverse staff and board leadership
- Understanding what inclusivity means for your organization
- Creating best practices, understanding duties, providing appropriate oversight and accountability, and building stronger board and staff relationships

Learn more about the education, coaching, and webinars we offer at talemconsulting.com.

Carole Rylander, CFRE, inspires and engages nonprofit leadership to maximize mission impact by strengthening fund development, governance and planning practices.

Carole is a:

- BoardSource Certified Governance Consultant, assisting organizations with enhancing governance practices, board culture, recruitment, diversity and inclusion, engagement, meeting practices and committee structures.
- Certified Fund Raising Executive, serving as counsel for feasibility studies, capital campaigns, major gift campaigns, case for support development and development audits.
- Trained facilitator, offering customized strategic and fund development planning processes to meet each organization’s unique needs.
- Frequent speaker, drawing on more than 30 years of service in the nonprofit sector to benefit board and staff members with highly rated workshops.

For more information visit rylanderassociates.com.

M. Gale & Associates’ vision is for all nonprofits to be equipped to lead and enact change to benefit their communities and the world through the power of strategic philanthropy. We are committed to promoting and building strong governance practices through informed and active volunteer leaders. We believe each relationship is unique and diverse, and that a nonprofit’s mission can be used as a lens of accountability to intentionally build a diverse, inclusive, and equitable environment. Through board and leadership development, M. Gale & Associates trains organizations to evaluate culture and practices, commit to intentional DEIA recruitment methods, and structure the board for better involvement and retention.

Find out more at mgaleassociates.com.