DIVERSITY & inclusion
INITIATIVE

Step-By-Step:

A Guide to Achieving Diversity and Inclusion in the Workplace

THIRD SECTOR
New England

Guidelines to Get Started

1. What would an inclusive and diverse organization look like, feel like? How would it function?

2. Has your organization defined diversity? How does this definition relate to and support the mission of the organization? Describe the organization's demographic composition (board, staff and constituents). Given the mission, how can the organization increase inclusion?

3. Describe the diversity issues that challenge the organization. Can these challenges help develop specific goals for internal diversity work?

4. What would be the organization's overall diversity goals? How will achieving these goals make the organization more effective in programs, in services?

5. Describe the organization's internal diversity work to date. Describe specific strategies and areas where they have been implemented to address organizational diversity issues. How is success measured?

6. Develop a budget for your planned diversity activities. Please consider any additional monetary or in-kind resources the organization will commit to its diversity work (staff time), as well as other funding.

Steering Committee

Ron Ancrum, Associated Grant Makers
Paola Ferrer, United Way of Massachusetts Bay and Merrimack Valley
Pam Jones, Boston Public Health Commission
Deb Linnell, Third Sector New England
Jeanne Morrison, Massachusetts Bay Transit Authority
Steve Schnapp, United for a Fair Economy
Klare Shaw, Barr Foundation
Tyra Sidberry, Third Sector New England
Elizabeth Smith, The Hyams Foundation

Step-By-Step:

A Guide to Achieving Diversity and Inclusion in the Workplace

Achieving diversity and inclusiveness in the workplace is a fundamental part of fulfilling the mission of any organization. Diversity and inclusiveness in the workplace is particularly important when the primary business is people serving people. Working to achieve diverse and inclusive environments has numerous *demonstrated* benefits, including:

- Enhanced creativity
- Better and more productive communications
- Faster problem solving
- Enhanced programs and services to constituents

Making the commitment is the first and most crucial step. *Educating ourselves* about how deep the commitment must be over time is a big hurdle. The best work requires commitment to support continuous efforts to address an organization's challenges. *Understanding that the work is not linear* is also important. There is no beginning and end on a checklist.

Achieving diversity and inclusiveness in your workplace is instead a process for creating change through education, collaboration and vigilance. Each new level of insight can result in growth and new experiences for individuals and the organization. The work itself can be uncomfortable, and the territory unfamiliar. The question is:

Are we willing to live with that discomfort for a time in order to achieve healthy, whole communities—with parity for all?

Phase 1: Prepare for Start-Up

Before introducing organization-wide diversity efforts, senior-level staff and the board of directors should learn as much as possible about implementing a diversity process. They should also identify internal and external resources that they can rely on for support and assistance, e.g., staffing and financial.

Familiarity with how other organizations have successfully managed an organizational change process can build commitment and enthusiasm. It can also create a sense of empowerment which may diminish the anxiety of venturing into uncharted waters.

While it only makes sense to be well-prepared before undertaking a diversity initiative, this preparation will almost certainly fortify the initiative during lag times and when these efforts are met with resistance.

Key Participants

- An organization's director/CEO should be the visible leader and spokesperson for achieving diversity.
- The board of directors should be involved from the outset.
- With leadership in place, a diversity coordinator(s) should be selected and given specific responsibilities and direct access to top management.
- A diversity committee should be established with representation that reflects the diversity of the organization and as many levels of the organizational structure as possible.
- *If it is feasible* to invite representatives of the groups served by the organization to join the diversity committee, they will add other vital perspectives.
- The organization may also consider hiring a consultant to assist with further planning and implementation.

Action Steps

1. To help build an effective working team, engage planners and leaders in team-building experiences, and provide educational materials about diversity and organizational change.
2. Determine a budget for the diversity initiative.
3. Identify various individuals including board members, senior or front-line managers.
4. Clarify time commitments and expectations for all participants.
5. Establish a calendar of regularly scheduled meetings for diversity planners.
6. Establish a short-term plan for the next stage of the initiative.
7. Consider hiring a consultant to assist with planning and implementation.

Timing

The executive director/CEO and the board of directors must determine when the diversity initiative should begin and whether or not there is a projected timeline for its implementation. Once these decisions have been made, it is time to schedule an event to kick off the initiative and give it recognition throughout the organization.

Phase 2: Establish a Framework

A substantive framework will help the organization build and reinforce the commitment to the diversity initiative, and respond to pressure from internal and external sources of resistance. There are several key components to the success of any initiative:

- A clearly articulated philosophy and vision about diversity and its connection to the mission of the organization
- Clarity about terminology such as *diversity, inclusion* and *cultural competence,* and working definitions of diversity and inclusion
- A "business" case for diversity which outlines the ways in which diversity can improve operations and enable staff and volunteers to more effectively meet the needs of those being served
- Expected outcomes stated with measurable language
- The concept of safety
- Candor

The concept of safety is a crucial component of the framework. Organizational leaders must create an environment in which all members of the organization feel they can participate and share their perspectives honestly without fear of reprisal.

Candor is essential in the assessment process if the resulting plan for diversity is to be accurate.

Key Participants

Organizational leaders must continue active involvement and should issue an open invitation for staff members to join the diversity committee as a way of creating "ownership" in the initiative. Participants should reflect the demographics and operational levels of the organization.

However, individuals who are people of color should not be expected to speak for that group as a whole. As participation in the initiative broadens, organizations should be sensitive to power dynamics. True inclusion will require *shifts in power.*

Action Steps

1. Define organizational culture by considering such factors as philosophy, policies and practices, interpersonal dynamics and work environment.
2. Articulate the benefits and motivations for becoming a more diverse organization.
3. Define what the organization will look like when it becomes more diverse within the context of mission.
4. Identify other organizations, both locally and nationally, that might serve as models for diversity efforts.
5. Develop a realistic action plan for diversity efforts that takes into account ongoing operations and competing priorities.
6. Develop criteria to measure success. In other words, begin to build an evaluation plan.
7. Create a safe environment for candid and honest participation.

Timing

Set fixed times for diversity committee meetings. Begin to schedule meetings and events to build momentum for the initiative, being certain that meetings and activities are accessible to those they are intended to include. Staff time for the diversity initiative should be incorporated into staff work plans so that the effort is not viewed as ancillary to their other responsibilities.

Phase 3: Begin Implementation

The first two phases set the stage for the diversity initiative. At this point, implementation begins in earnest and activities become more visible as organizational interventions.

During this phase, the organization continues to build knowledge through needs assessments or a cultural audit, and is able to identify issues and themes that relate to diversity. It also sorts out other issues that represent general organizational and management problems. The assessment can also help identify existing resources and other strengths which can be very encouraging.

A comprehensive needs assessment will gather data about interpersonal behavior, organizational culture and systems that impact people. The findings of various audits and assessments can be used to develop a strategic plan to address diversity-related concerns.

Lending objectivity to the information gathering process is critical. If a consultant has not been engaged up to this point, now would be the time to work with someone who has knowledge of organizational development issues and experience with diversity initiatives.

As different members of the organization become involved through various activities, expectations and reactions begin to emerge. If not already evident, resistance is likely to occur as increasing time and attention are given to the diversity initiative. It is essential to have a communication plan in place to support the process that is underway.

If a strategic planning process is underway, outcomes of the assessment can inform the planning process. If the organization is working within an existing strategic plan, those goals and objectives should be reviewed at the outset of creating the diversity framework.

Key Participants
The diversity committee will plan and oversee the needs assessments and/or audit, and take responsibility for developing a diversity plan based on the findings. Managers should have input and be prepared to communicate plans to their respective departments and to help build commitment.

Action Steps
1. Engage the services of an experienced consultant.
2. Conduct a needs assessment or cultural audit among staff, board members and constituents, when appropriate, of the organization, or at least among a representative sample. And communicate findings throughout the organization. Audit organizational demographics, systems, policies and procedures.
3. Determine priorities within the context of the strategic plan and a realistic timeline, considering resources such as staff time and ongoing operations.
4. Set relevant, pragmatic and achievable goals for bringing about organizational diversity. Articulate expected outcomes and measures of change.
5. Use meeting agendas, newsletters, memos and other forms of communication to publicize the diversity process and accomplishments of the initiative to date and to outline the next steps.

Timing
Allow sufficient time to ensure that the needs assessment or cultural audit and planning process are not rushed or forced.

Phase 4: Integrate Diversity and Organizational Goals

In many ways, this stage is the linchpin of a diversity initiative. Individuals at all levels of the organization become involved through education and training programs, while diversity committee members continue to review existing policies and procedures as they relate to diversity. As more individuals are involved, communication efforts should be enhanced.

All activities should be monitored to determine their effectiveness in supporting diversity goals. Adjustments should be made as necessary. Data gathered at the conclusion of specific activities will also contribute to the overall evaluation process.

Key Participants

Senior management and other key staff throughout the organization should remain actively involved and should seek feedback and accountability from managers and others instrumental in moving the various action steps forward.

Action Steps

1. Employ consultation and technical assistance and appropriate training to promote diversity goals. All efforts should be pragmatic in their approach relating to daily operations and presented in a positive way.

2. Call upon skillful consultants to implement activities and place diversity efforts within the context of the total organization.

3. Seek ongoing feedback from participants as a way to refine the relevance of activities and monitor overall progress. Ask, How does the organization implement inclusive practices?

4. Anticipate reactions and issues that will surface and have guidelines in place to address them.

5. Use a variety of strategies to communicate about the diversity process, while reinforcing the connection of diversity activities to the larger goals and mission of the organization.

6. Establish committees with representatives from different areas of the organization to review policies and practices that relate to diversity concerns.

Timing

Schedule and announce upcoming events with adequate lead times. Be certain that major diversity-based activities are scheduled at optimal times and that individuals are acknowledged for their role and participation.
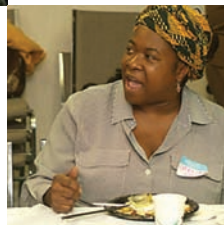
Phase 5: Evaluate Progress

Informal evaluation should take place throughout a diversity initiative to revise and refine specific activities. But it is also essential to engage in a formal evaluation with a design and methodology that will assess overall organizational change and measure the impact of diversity efforts. In undertaking an evaluation, organizations should anticipate three types of outcomes:

- progress
- no progress
- unexpected change

Be prepared to address each.

Key Participants

A consultant can bring a broad and objective perspective to the task of evaluation. In many cases, one consultant may be able to provide an important thread of continuity by fulfilling a number of responsibilities from assessment to planning to evaluation.

At each stage of the diversity initiative, however, the organization should make sure that the consultant has the appropriate skills. A consultant's familiarity and experience with your type of organization can yield results more effectively.

While the consultant may take the lead in evaluation, the diversity committee should give direction to the consultant and remain actively involved throughout the process.

Action Steps

1. Focus the evaluation on the measurable goals and objectives of the diversity initiative.
2. Use a comprehensive approach to evaluate individual change as well as changes in organizational systems. Gather data through multiple methods and from multiple sources.
3. Identify barriers and enablers to achieving diversity and inclusion to help guide subsequent efforts.
4. Communicate findings throughout the organization to build knowledge and understanding.
5. Acknowledge and celebrate even the slightest increment of progress.

Timing

In practice, evaluation begins at the earliest stages of the initiative and continues throughout. Including evaluation as an ongoing component of a diversity initiative design allows for the flexibility and refocus necessary to stem resistance– and keep the process moving forward.

Phase 6: Redefine Direction and Goals

An organization should use the results of the evaluation to reexamine and redefine its direction, clarify and focus goals and objectives, develop new strategies and plan for the future.

Key Participants

The diversity committee should review the findings from evaluations and other sources. It should also make recommendations about future directions for consideration by the executive director and board.

Action Steps

- Modify goals and objectives, establish new goals and strategies, and conduct future planning.
- Seek to determine the context in which change *is* or *is not* occurring.
- Seek recommitment from key participants.
- Communicate new goals and strategies throughout all levels of the organization.

Timing

Acknowledge "burn out" and any changes that lead to a reconstitution of the diversity committee in a timely way. Create opportunities for other people in the organization to join the committee.

Phase 7: Consolidate Activities and Policies

The most successful aspects of the diversity initiative should be incorporated into the general activities and policies of the organization. This will help to ensure the ongoing presence and vitality of diversity efforts even as an organization takes steps to address other unmet diversity needs.

Key Participants

Senior management and the board of directors should take the lead in recommitting to diversity efforts and in articulating the alignment. They may also need to examine the mission as well as benefits for the entire organization and its constituents.

Action Steps

1. Reexamine working strategies and solutions to determine if they should become part of the organization's structure, processes or strategic planning.
2. Develop or use new methods to assess and promote progress on an individual and organizational level.
3. Continue to introduce new practices and events that support a multicultural organization.
4. Integrate elements of the initiative that speak to a "business" case for diversity.
5. Articulate the mission within the context of outcomes and newly implemented strategies.
6. Ask, How do we demonstrate inclusion?
7. Engage management in a discussion about next steps, and identify other expertise and resources to help move the organization in that direction.
8. Revise and or refine the communications plan.

Timing

It cannot be emphasized strongly enough that there is no "end" to a process which helps create diversity and supports inclusion. The seven phases are repeated at each new level of organizational growth.

Nonetheless, when an organization arrives at the *consolidation* stage, it is important to publicly acknowledge that a milestone has been reached. It is vital to take stock of accomplishments to date and use them to envision the next stages of the organization's development.
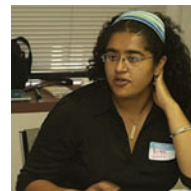
■ ■ ■ ■ ■ ■ TSNE's Diversity and Inclusion Initiative

The Diversity and Inclusion Initiative (DI) is widely recognized as Greater Boston's primary resource for area nonprofits working to create inclusive organizational cultures. Since 1990, the program, now part of Third Sector New England, has helped nearly 100 local organizations support equal opportunity and access to power and influence.

Today, through the work of the DI staff and the Diversity and Inclusion Initiative Steering Committee, Third Sector New England's program offers best practices and creative solutions for achieving the goal of organization-wide diversity – to become stronger and more effective. Strengthening individual nonprofits and the sector as a whole, the Diversity and Inclusion Initiative:

- *Collaborates* with and supports nonprofits seeking to increase their effectiveness through diversity. To date nearly 100 organizations have been awarded over $1.3 million in technical assistance grants.

- *Develops* a community of practice among grantee organizations through individual and collective technical assistance and during quarterly meetings with all grantees. Workshops focus on recruitment and retention strategies, class issues and biases, and disability awareness and power.

- *Supports* a range of activities within nonprofit organizations, including organizational assessments, diversity plan development, staff and board training, and revisions of bylaws and personnel policies. The DI also supports implementation of recruitment and retention strategies and staff time.

- *Sustains* a resource partnership with Community Change, Inc. by expanding a collection of anti-racism materials in the Pappenheim Library. This includes print, video and audio media on diversity and inclusion – for use by any organization.

- *Maintains* a consultant database for organizations that choose to use diversity consultant services and expertise to facilitate internal initiatives.

- *Provides* visibility to diversity issues through events like Organizational Diversity – Why Bother? – a public forum presented to the Boston community.

Program Accomplishments, 1990–2009

- Created a program model – today recognized nationally to help organizations identify and address diversity and inclusion challenges – based on collaborative learning among grantee organizations, which includes technical assistance, peer support and training.

- Collaborated and supported 100 organizations with $1.5 million in technical assistance grants.

- Undertook formal evaluations of grantees: 1992, 1994, 1996, 2003, 2007.

- Partnered with Community Change Inc., an anti-racism organization, and subsidized expansion of its library to include print, audio and video materials on diversity and inclusion.

- Featured in news articles and periodicals: *The Nonprofit Quarterly, Bay Windows, Baystate Banner, Managing Diversity, Boston Business Journal, Boston Globe* and *Chronicle of Philanthropy*.

More About Third Sector New England

Providing management support, Third Sector New England helps nonprofit organizations effectively engage and strengthen the communities they serve. Our programs and services include executive and organizational transition, executive search, management consulting and training, and grantmaking to foster diversity and capacity building. We also provide fiscal sponsorship regionally, and we have developed the multi-tenant TSNE NonProfit Center for Boston's progressive social change organizations. As nonprofit professionals, we share the sector's best practices and creative solutions, with an emphasis on helping to create supportive nonprofit networks.

For updates on trends, best practices and news from the sector, sign-up for the TSNe-Bulletin and/or join our other e-communities at **www.tsne.org.**

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