

# Translating Complexity Into Effective Practice

BRIEF 04

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Diversity, Equity, and Inclusion:  
Strengthening OMG's Consulting Competence

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OMG CENTER FOR COLLABORATIVE LEARNING

# Diversity, Equity, and Inclusion: Strengthening OMG's Consulting Competence

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**AS SOCIAL SECTOR ADVISORS**, OMG IS COMMITTED TO IMPROVING THE QUALITY OF LIFE AND OPPORTUNITY FOR ALL PEOPLE. UNFORTUNATELY, OUR 30 YEARS OF EXPERIENCE WORKING IN COMMUNITIES AROUND THE UNITED STATES ILLUSTRATES THAT RACIAL AND ETHNIC HERITAGE OFTEN IMPEDE PEOPLE'S PURSUIT OF QUALITY EDUCATION, HEALTH, HOME, AND COMMUNITY. PERSISTING NEGATIVE ATTITUDES, POLICIES, AND STRUCTURES CONTINUE TO CREATE DISPARITIES THAT KEEP AFRICAN AMERICANS AND LATINOS AT A DISADVANTAGE.

**T**o help all people achieve better outcomes, OMG believes that philanthropic and nonprofit advisors must understand their own attitudes towards diverse populations. They must also have appropriate tools to frame, analyze, and uncover the causes underlying persistent inequities of experience and opportunity. Finally, to build a consulting practice committed to diversity, equity, and inclusion (DEI), it is essential to institutionalize organizational policies that build and support the DEI skills of all staff.

The next several pages illustrate what OMG is doing to increase our organizational capacities in DEI, and the early lessons we have learned.

### **Deepening and Sustaining OMG's Commitment to Diversity, Equity, and Inclusion**

With a 30-year commitment to diversity, equity, and inclusion, OMG has recently renewed our intention to deepen our ability to help right generations of injustice. This recent work was ignited in 2008, when we became co-developers and co-directors, along with Dr. Rodney Hopson of Duquesne University, of the Robert Wood Johnson Foundation's Evaluation Fellowship Program ([www.rwjf-evaluationfellows.org](http://www.rwjf-evaluationfellows.org)). The program provides one year fellowships to minorities, first-generation college graduates, and people from low-income communities. During their fellowships, participants obtain the skills to become effective, culturally-responsive evaluators, primarily through full-time placement in evaluation firms.

OMG has annually hosted an RWJF evaluation fellow. The first Fellow observed that OMG, despite good intentions, struggled to implement its own vision for culturally responsive evaluation. "He challenged us to be more authentic in our practice and take a better look at strengthening our methodologies," said Gerri Spilka, president of the OMG Center. "We had to listen. So we started taking a tougher look at how effectively we were doing that work."

Over the following four years, fellows and staff began to help OMG focus more deliberately on building its organizational competence in diversity, equity, and inclusion. This work was further spurred in 2009 when OMG became the National Program Office of the RWJF New Connections Program. New Connections is a program of the Building Human Capital portfolio ([www.rwjf-newconnections.org](http://www.rwjf-newconnections.org)) which supports the development of diverse health and healthcare scholars.

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**"To institutionalize DEI practice, staff must be held accountable for it."**

—EDITH ARRINGTON

### **Steps OMG Is Taking to Strengthen Diversity, Equity, and Inclusion in Our Consulting Practice**

Spilka, other OMG staff, and RWJF fellows all knew it was time for a more considered approach to ensuring that the firm's commitment to diversity, equity, and inclusion informed every aspect of the organization's strategy, evaluation, and capacity-building work. To do so, OMG:

#### **Participated in an organizational self-assessment that focused on diversity, equity, and inclusion in the workplace.**

Using the Race Matters Institute's (RMI) organizational self-assessment tool ([www.racemattersinstitute.org](http://www.racemattersinstitute.org)), OMG realized that it had more work to do to institutionalize DEI practice, particularly in deepening methodological skills, establishing policies and structures, and broadening responsibility for DEI beyond the organization's president.

To build the case for this approach, it was important to understand structural barriers through an historical perspective and to hold respectful, open discussions about race among staff. OMG brought in experts from the Race Matters Institute to discuss approaches and methodologies for this type of work.

"To get staff introduced to this, we had a lot of explicit conversations about culture and race and people's values," said Monica Getahun, a former RWJF Evaluation Fellow at OMG.

#### **Created a diversity, equity, and inclusion committee in the summer of 2010.**

RMI advisors recommended creating a group to look at racial equity and diversity across the organization. OMG leaders and staff also understood that to sustain organizational change, staff from various levels and perspectives would need to lead the work. Spilka, therefore, created a diversity, equity, and inclusion committee to spearhead the organization's development of a DEI practice.

Spilka gave the committee authority, resources, time, and space to do its work. The committee met monthly, brought in experts for training, and became an integral part of OMG's ongoing staff development activities. About a year after

the formation of the committee, an RWJF evaluation fellow worked with the committee to develop a theory of change that mapped out specific goals and activities to move the group's work forward.

The diversity, equity, and inclusion committee proved to be an effective hub for OMG's efforts to develop a more robust DEI practice. The committee's work led to the following changes:

*OMG staff continues to dedicate time to building their skills in DEI practice, with an initial emphasis on culturally-responsive evaluation.*

Strategy, evaluation, and capacity building are OMG's core service offerings; however, evaluation represents about 60% of OMG's portfolio. Thus, an initial DEI committee focus was to build and support staff capacity to do deeper, better culturally-responsive evaluation (CRE) in communities and for clients. The diversity committee provided training and materials for staff, using the CRE framework provided by Dr. Rodney Hopson, and other analytic tools from the Race Matters Institute.

"Our staff felt that often they recognize issues determined by race, but they were not sure about how to bring these issues to clients' attention," said Justin Piff, project manager. "The DEI committee continues to help staff develop strategies for raising the subject of race to clients in a thoughtful way."

OMG staff is beginning to explore additional methodologies to advance disparity research in applied settings.

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—JUSTIN PIFF, PROJECT MANAGER

*OMG institutionalized a DEI focus in its research questions and methodological standards.*

Jill Gurvey, the OMG Center's director of research, leads the committee in producing research guides outlining DEI research standards. For example, in our data analyses, disaggregating by and controlling for race, ethnicity, income, and gender have become standard practice. By including these standards in our policy guides, a DEI approach is not dependent on the interest of a specific team member, but becomes part of an institutional research and evaluation method. The DEI committee also reviews and the research guides and other documents produced by the organization.

*The human resources department added questions on DEI competency to OMG's performance review system.*

As Edith Arrington noted, "To institutionalize DEI practice, staff must be held accountable for it." In 2012, OMG updated its performance review and 360-feedback systems to include questions on how staff members design evaluations, collect and analyze data, and present findings on all affected groups. Other questions include whether staff routinely talked with clients about findings as they relate to all affected groups, and whether they were able to influence clients' perceptions on the issues.

### **An Intentional DEI Approach Makes a Difference**

At OMG, several staff noted that more of their internal conversations now incorporate a racial equity perspective when designing projects, asking research questions, and sharing findings. They also pointed out specific changes OMG has made — for example, by refocusing on DEI, OMG has brought in more staff of color, growing from one African-American staff person to four, out of a total staff of twenty. Also, new vendors and consultants of diverse backgrounds have increased the diversity of the external consultants OMG often relies on to round out project teams.

Like-minded philanthropic leaders have recognized OMG's institutional focus on DEI. For example, OMG was among three firms recently selected to provide "Insights on Diversity" to the D5 Coalition to increase philanthropy's diversity, equity, and inclusion. OMG will examine how foundation and grantee activities intersect to broaden diversity, equity, and inclusion in grantee practices.

Also, OMG staff cited ways that their DEI focus adds value to clients. For example, as part of a strategic review for a community foundation in the Northeast, OMG did a community scan that included interviews with 30 community leaders and a data review that looked at socioeconomic and education indicators. OMG found that there had been major shifts in the demographics of the target communities. On virtually all measures, Latinos and African-Americans had worse outcomes than other demographic groups. By looking for at those data and bringing the findings to the attention of foundation leaders, OMG revealed severe racial and class inequities in the region which led the foundation to target its funding to address those inequities.

"I became much clearer on how we could compare data across population groups," Spilka said. "Our staff DEI skill-building conversations gave me permission not to be 100% comfortable with talking about race disparities, but to put it out there to begin the conversation. The data is so compelling; people could not help but see the gaps in population disparities over time."

### **Challenges**

Taking steps to build a DEI-competent practice requires serious commitment: it simply takes time for people to meet about this work, build skills, and establish systems that monitor how well the emphasis on DEI is implemented across the organization.

A related challenge is to put these tools into everyday practice, especially in the midst of the every-day demands of a busy evaluation and consulting firm. It is tempting, understandably, to focus on the daily needs of a particular client and to put time-consuming racial-equity analyses on the backburner.

Finally, clients may not view cultural responsiveness and racial equity as priorities.

"One of the things we have to get better about is shaping the message about race to clients," Spilka said. "Some of the largest foundations are well intentioned, but they have no ability to talk about race with their staff or to higher leadership. It's not necessarily a priority."

## LESSONS LEARNED

- DEI practice must start with leadership commitment. Senior leaders, including the chief executive officer, must believe in the importance of this work and be willing to put resources behind it.
- To do this work, organizational cultures must encourage constructive dialogue and debate. The culture at OMG is that people agree to disagree. Staff members are expected to challenge one another in ways that add depth and quality to our conversations.
- As an initial step, organizations must carry out a self-assessment to enable staff to be honest about their own and the organization's DEI capacity and to look for areas to improve. Organizational assessments can uncover unexpected obstacles and identify areas requiring special attention.
- A diversity, equity, and inclusion committee that includes senior staff members should spearhead the work. Such a committee can make sure that DEI issues are kept at the forefront of a busy practice. This committee requires time to meet on a regular basis and authority to look at all aspects of the organization that need to focus on DEI, including human resources, research, and content areas. It also needs allocated resources to consult with external advisors.
- It's important to bring in external experts to enable staff to learn what it means to have a DEI practice, and what such a practice would look like throughout the evaluation and consulting process. Staff members also need practical tools to carry out the work.
- Make sure that the organization is using methodological instruments that are reliable and valid for the population with which it is working. If unsure about what instruments to use, the organization should seek out experts in the field for guidance.
- Set organizational priorities that are reasonable and obtainable. These priorities should make clear what the organization seeks to accomplish and in what time frame, and continue to assess progress and revise priorities.
- Organizations should put into place accountability mechanisms, such as questions about use of DEI tools in performance reviews, to help ensure that staff and the organization institutionalize this work.



**OMG Center**  
for Collaborative Learning

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