

DIVERSITY, EQUITY, INCLUSION

CREATING AND OPERATIONALIZING YOUR PLAN

[Based on the Pillar Nonprofit Board Diversity Training Toolkit](#)

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Presents an overview of what the issues of diversity and inclusion are about and why these issues are relevant to community organizations.

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Section III: Tools and Strategies

Offers tools and concrete tips that community organizations can use as they go through the process of becoming more inclusive.

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Offers examples of diversity policies, recruitment strategies and tips for board mentorship.

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Highlights examples of how your organization can keep racial equity on the table and how to evaluate your progress.

SECTION I: THE IMPORTANCE OF DIVERSITY AND LEADERSHIP

The Definition of Diversity and Beyond

Diversity: The combination of ways in which each of us is like all others, like some others, and like no other

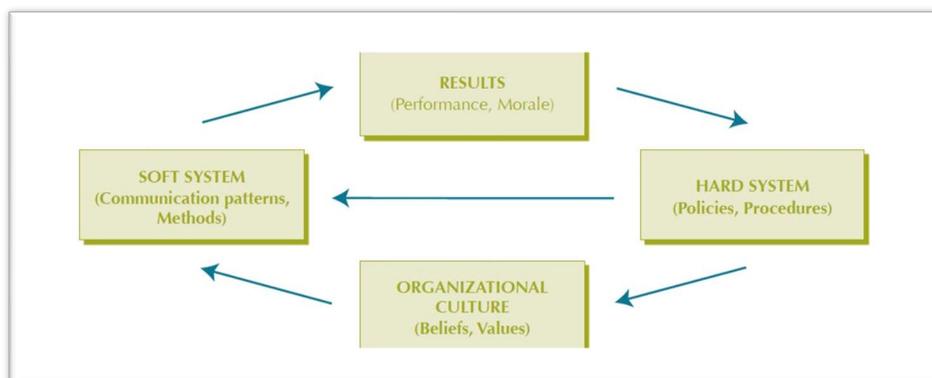
Representation: The number of demographic group members present

Inclusion: The extent to which all members of a diverse organization are included in important decision-making processes and social interactions

Assimilation: The requirement that individuals conform to the dominant organizational culture

Multiculturalism: The ability of an organizational culture to learn from and incorporate the values of non-dominant cultures

Organizational Change and Racial Equity



Benefits of Diversity

Greater creativity and improved problem-solving
Better insight into the needs of a diverse customer/client base
Enhanced ability to attract the best talent in a diverse labor market

SECTION II. LET'S GET STARTED

STEP 1: BOARD ASSESSMENT

Conducting an assessment will help an organization clearly identify where the current gaps lie within the governance structure in terms of cultural competency and how the board should proceed in order to put racial equity on the agenda.

For the purpose of the Board Diversity Project, the [Pillar Nonprofit Network](#) created a survey containing 45 questions, specifically designed to be completed by boards of directors and senior management. It focuses on the following sections:

- Organizational Culture
 - The objective: To assess the organization's overall understanding and commitment to cultural competency
- Document Checklist
 - The objective: To ensure that all of the organization's documents recognize cultural and racial diversity in the community as well as among board members, staff, volunteers and clients.
- Governance
 - The objective: To assess the governing body's structure, commitment, knowledge and skills with respect to cultural competency (includes the organization's vision, mission, operations and goals, as well as selecting new board members, board orientation, training, evaluation and selecting executive directors).
- Policy
 - The objective: To assess the policy development process to ensure cultural and racial diversity as well as meaningful participation from community members, board, staff, clients and volunteers is included.

[**You can access a link to the survey here**](#)

STEP 2: SETTING YOUR DIVERSITY GOAL/VISION

When deciding to embark on an organizational change process, your organization should collectively decide what the approach will look like.

It is also important to recognize that if your organization decides to challenge power and racism and create real equity in the organization, everyone must take an honest and critical look at how you do things. This would include the ways in which the traditional systems and everyday practices of your organization may benefit the "dominant" groups and disadvantage racialized people. Your organization's diversity goal should include goals for inclusion, where procedures are established that address real disparities of power among people. Inclusion means "*the extent to which all members of a diverse organization are included in important decision-making processes and social interactions.*"

STEP 3: CREATE A DIVERSITY/EQUITY COMMITTEE

One action that has proven effective for many organizations embarking on organizational change and racial equity is to create a diversity/equity committee. The committee would monitor the progress of the work relating to diversity in the organization. The committee should be comprised of individuals inside and outside of the organization. Staff, board, volunteers, and experts in the community will ensure different perspectives are represented.

The goal of the committee should be to provide leadership on diversity issues in the organization, to take on related tasks (such as reviewing materials, policies and procedures), or to facilitate discussions with staff.

Helpful things to remember when establishing a committee:

- establish terms of reference*
- create a shared understanding and vision
- develop leadership
- generate involvement
- conduct education and training sessions

**Establish terms of reference. The terms of reference will include decisions about the following:*

- purpose of the committee
- roles of members
- decision-making procedure
- reporting relationships
- authority and accountability
- resources available
- membership composition
- meeting schedule

STEP 4: TRAINING AND EDUCATION

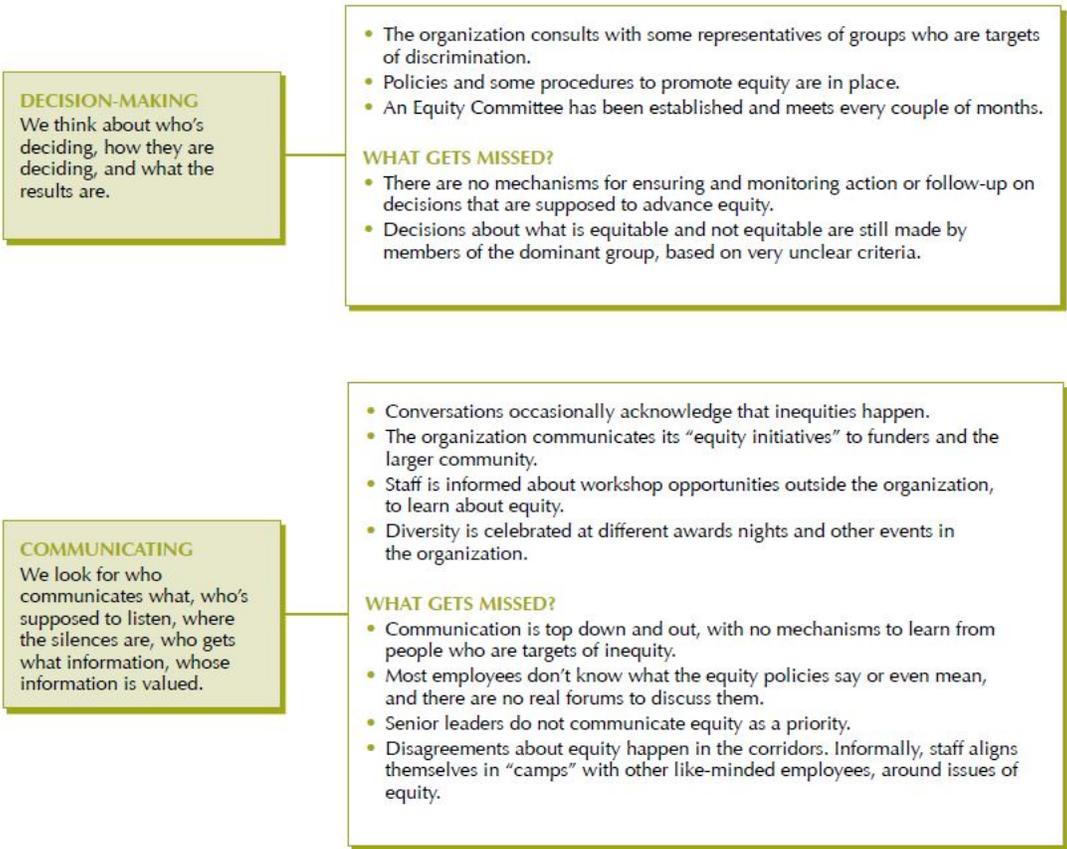
Diversity training is an ongoing process. Once your organization has finished the assessment, developed a goal and secured a committee to oversee the work, the next step will be board training and education on diversity, racial equity and governance.

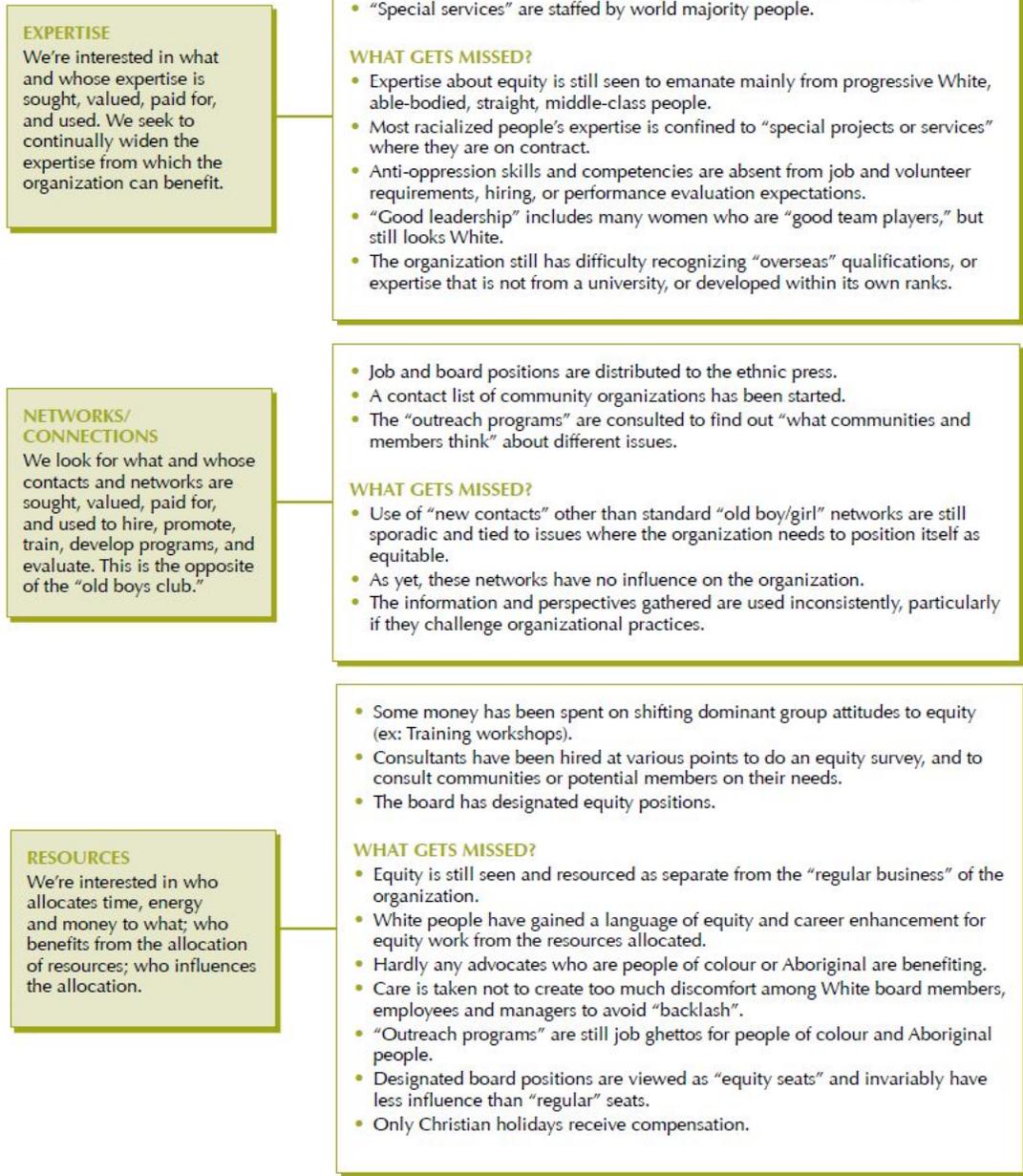
Board training and education sends a message to the entire organization that the board is committed to diversity, demonstrating that they are willing to dedicate resources to building the capacity of the organization, to respond to the needs of the diverse community, and to become more inclusive. Training should be provided to the entire board, staff, and volunteers involved in the organizational change process, and should include an orientation for new board members, staff, and volunteers to ensure sustainability. Training and education should be seen as part of the organizational change process and of a long-term strategy and should not be an isolated activity.

SECTION III. TOOLS AND STRATEGIES

1. MODELS OF DIVERSITY ACTION PLANNING

After training and education, your board will be more capable of developing its diversity action plan. Highlighted below are two models of diversity action planning used with participating organizations in the Board Diversity Project.





The Vision

A) Why diversity? The board should ask themselves the following questions:

- What's wrong with the way things are now?
- What exciting new directions are possible?
- What organizational characteristics facilitate exciting possibilities?
- What organizational factors serve as barriers to pursuing those possibilities?

B) Imagine your organization is managing and valuing and celebrating diversity:

- What is happening?
- What does it look like?
- What are people doing?

- What does it sound like?
- How are decisions being made and who is making them?
- Who communicates what and who's supposed to listen?
- Where are the silences?
- Who gets what information and whose information is valued?
- What and whose expertise, contacts and networks are sought, valued, paid for and used to hire, promote, train, and evaluate?
- Who allocates time, energy and money to what?
- Who influences and benefits from the allocation of resources?

Create Action and Communication Plans

Who does what and when at the Board and staff levels

Who is the messaging for? Internal? Members? Potential Members? The Public? Journalists? Social Media?

SECTION IV. PUTTING YOUR PLAN INTO ACTION

A) DIVERSITY POLICIES

After your organization has developed its action steps to change at an internal level, it is important to formally articulate what your organization is trying to achieve and how you will go about doing it. Are you creating a Diversity Policy as a guideline specifically for your board, or create a policy that is relevant for the entire organization?

Diversity Policies should contain:

- A values statement about the organization's commitment to issues of diversity and equity;
- A brief statement of the added value that implementing this policy will bring to the work of the organization, for example, better reflecting the demographics of the community it serves, design programs and services that better serve the needs of diverse groups;
- A set of milestones that the board would like to achieve; and
- An accountability framework for achieving these.

A diversity policy needs a concrete statement of objectives, a resource allocation to ensure implementation, and an implementation strategy that outlines, in priority, the steps to be taken to reach the goal. Steps to develop the implementation strategy can include:

- A review of the existing membership strategy for board recruitment to identify systemic barriers to gender equity and participation of ethno-racial communities; and
- Identifying previously disadvantaged groups and inviting individuals from those groups to discuss new criteria for gender equity and participation of ethno-racial communities in the governance structures.

Accountability is about determining who holds responsibility for board structure and what system will be established to monitor and evaluate the policy. Ideas for accountability include:

- Membership committee of the board leads and monitors the policy;
- Require all board members to ensure that other board and board committee members are treated with respect;
- Develop an annual action plan to guide implementation of the policy and sets out objectives, actions required, accountability, responsibility, timelines and evaluation of activities; and
- Periodically assess the policy to ensure it is up-to-date.

B) BOARD RECRUITMENT

Before attempting to recruit volunteers from ethno-racial communities onto your board, a good practice is to perform an internal board assessment to see where your barriers may lie. The goal of recruiting individuals from diverse backgrounds is not to fill a quota; rather, it is to enhance your board's ability to reflect the diversity of the community and to respond to the needs of your diverse members.

Step 1: Establish a Nomination Committee

Step 2: Identify and recruit qualified individuals from ethno-racial communities

Step 3: Create a Board Mentorship program

Step 4: Implement ongoing Board training

SECTION V. ACCOUNTABILITY FRAMEWORK AND EVALUATION

Establishing an accountability framework will help your organization organize its goals and the specific actions needed to achieve equity and decide who is responsible for ensuring the success of the actions.

Evaluating the organizational change work that has been done in your organization is helpful, as you can identify the successes and work that still needs to be done in order to achieve racial equity in your organization. Ongoing monitoring of your progress is helpful in ensuring your racial equity goals are a priority. Building a diversity lens into regular review and evaluation processes throughout all aspects your organization over the long term is good practice.

Track your progress

- Set indicators of progress and success and make them measurable
- Set indicators ahead of time so you know what information is needed to collect and monitor progress on an ongoing basis
- Hold your board, staff, and volunteers accountable for things that have and have not been accomplished

Evaluate the Outcomes

- Use both qualitative and quantitative methods to assess the results of your initiative
- Incorporate these methods into your existing organizational framework for measuring performance
- How are we doing? What have we achieved to date?
- What worked, what didn't work, and why?
- What needs to be adjusted?
- Where do we go from here?

Reflect on the Process

- Ask others for feedback
- Replace, modify or eliminate those components of your initiative that were not valuable