Diversity, Equity, and Inclusion Work: Eight Questions for Building Readiness and Steering Clear of Pitfalls

Diversity, equity, and inclusion work can transform organizations and help them do their work more effectively. This work can be most successful when people are fully invested and have a good idea what is involved. Without this, organizations sometimes set themselves up for failure and bring consultants in with unrealistic expectations. If you are thinking of launching into work around diversity, equity, and inclusion, this post may help you think about how to set yourself up for success. The questions below may serve as a useful checklist for assessing readiness, avoiding common pitfalls, and understanding the roles of consultants and people inside the organization.

1. **Do you have champions who have energy and passion for the work?** You don't need a commitment from the entire organization to start the process. You do need people inside the organization who will champion and hold the work, including people in positions of power. If most of the champions are people of color, it is important to honor their leadership without expecting them to carry the weight of the work. A consultant can work with champions in your organization, and can cheer them on, but cannot be your champion. **Pitfalls:** Over-reliance on consultants leaves the organization without people to champion the work and/or champions have no support from people in power, which limits their ability to make changes.

2. **Can you make a long-term commitment to doing the work?** There are no quick fixes. The work is ongoing. If you bring a consultant on for a short-term gig, such as a workshop for staff, it is essential to think about how the work fits into an ongoing process and how you will sustain this process after the consultant leaves. A consultant can help you map out what that process might look like. It's up to you to create the will and way to carry the process forward. **Pitfall:** Doing a one-time event raises expectations and has no meaningful results. This can leave people feeling unsafe and demoralized.

3. **Is your leadership team generally functional and willing to learn and grow?** Work around diversity, equity, and inclusion often uncovers larger challenges in leadership function. If, for whatever reason, there isn't room for healthy dialogue, learning, and change, the conditions for progress related to diversity, equity, and inclusion may not exist. A consultant can help point out areas where organizational growth can occur. Leaders must be able to function at a level that makes it possible for them to be proactive in the organization's growth. **Pitfall:** Leaders become obstacles to change and the organization is unable to move beyond the status quo.

4. **Do your leaders see this work as part of their jobs?** If leaders (people in both formal and informal leadership roles) see the work as peripheral to their jobs, they will not own this work as an essential part of their leadership role. Leaders play an important role in setting a tone for the organization, building readiness, moving the organization through resistance, and ups and downs. A consultant can help leaders understand their roles and responsibilities in leading multicultural organizational change. It's up to your leaders to embrace these responsibilities. **Pitfall:** The work goes nowhere because leaders aren't invested and are waiting for someone else to lead. A few people, often people of color, are expected to carry do the work.

5. **Are you willing to go through ups and downs?** This work isn't about perfectly executed plans and actions. It's a human process involving human interactions. It can get messy and have ups and downs. If you expect difficult moments as a normal part of the process, it's easier to keep moving forward. A consultant can help you understand what you can expect. It's up to you to keep the process moving through those ups and downs.

Pitfall: The organization hits a rough spot and commitment goes out the window.

6. **Are you willing to examine and address larger systemic issues?** If you are dealing with a specific issue, such as hiring more staff of color, or a race-based conflict between individuals, it is likely that the issue is linked to larger systems. There may be basic assumptions operating, ways of communicating and patterns of doing things that need transforming in order to address these systemic issues. A consultant can help you uncover the larger systemic issues and design ways to address them. It's up to you to insure that these issues get addressed. **Pitfall:** Meaningful change doesn't happen, because issues are dealt with in isolation.

7. **Are you willing to acknowledge and address racism, power, and privilege?** Dynamics of racism, power, and privilege always come into play in organizations, and usually aren't discussed. They also surface during the process of working for change. Work around race is often fraught with defensiveness, micro-aggressions, and resistance. When there is a willingness to acknowledge these dynamics and work to transform them, trust can be built and the organization can become a place where everyone is valued and able to fully contribute. A consultant can help you understand the dynamics of power and privilege and develop awareness and skills to address them. It's up to people inside the organization, particularly the leaders, to do the work on a day-to-day basis. **Pitfall:** Dynamics of power and privilege go unchecked, and the work cannot succeed. People of color continue to be negatively impacted by these dynamics.

8. **Are you willing to invest in communication and relationship building?** A huge concern of nonprofits is that everyone is so busy that they don't think they have time to stop to do the work it takes to really listen and dialogue with one another. This culture of busy-ness is part of the business-as-usual that needs to be interrupted. A consultant can help you develop your ability to communicate more effectively and facilitate activities to strengthen relationships. It's up to you to make it a priority to carve out time for communication and building trusting relationships. **Pitfall:** The organization stays mired in tasks and fails to attend to building relationships.

If your answer to all of these questions is a solid "yes", then you are probably in a good position to move ahead with diversity equity and inclusion work. If your answer to any of these questions is "no" or "not so much", don't despair. It doesn't mean you shouldn't start the work. The first phase of your effort might be putting the foundations in place so that you can do sustainable work. Starting where you are, even if it isn't as far along as you'd like to be, will give you the best chances of success.

Thanks to my colleague Isoke Femi, Transformational Group Facilitator/Coach at Transformative Strategies who helped me get clearer on the focus for this post and reminded me of the importance of relationships.

Related posts:

Undoing Patterns of Privilege as we Learn

Seeing and Naming Racism in Nonprofit & Public Organizations

Diversity & Equity: Closing the Leadership Gap

#BlackLivesMatter:5 Tips and 25 Questions for Nonprofit & Public Organizations

Note to readers: I hope you enjoyed reading "Lessons from the Field." If you find this information useful and want to share it with others for purposes of learning (not for profit), please feel free to do so. Thanks!

Walking the Talk:
Change Starts With The Self

A Tool for Self-Reflection, Assessment & Development

Many leaders in the community foundation field have a strong commitment to diversity, inclusion, and equity. They recognize the importance of drawing upon the unique strengths of our increasingly diverse communities. They believe that people of all backgrounds should have a voice in shaping the direction of their own lives as well as the future of their communities. They work to ensure their foundations play a leadership role promoting equal opportunity and equitable access to resources—within their foundations and in their communities. This assessment tool offers an opportunity to specifically think about how you are and could be further promoting these values in your own efforts.

While egalitarian and democratic values are an important foundation to the development of a just society, making sure that each one of us realizes them in the way we do our work isn't always easy. Often in the course of our daily lives and work, we move away from our beliefs without even noticing it. We may fail to live up to these values because we are responding to pressures such as lack of time or resources, or peer expectations to conform to existing norms. Sometimes, we engage in an ex-clusionary practice because we are unaware of its harmful impact. Or we may feel unsure of how to take a stand given our particular role or position. In some cases, we start off on the right foot but aren't able to sustain the effort.

This tool focuses on you as an individual because you can make a difference. Successfully addressing issues of diversity, inclusion, and equity requires ongoing vigilance. It requires that each of us take the time to clarify and deepen our values and be-liefs; and equally important, that we take the time to examine whether our actions promote our values and beliefs—about inclusion, equity, and justice . Self-assessment is essential if we are to cele-brate our successes and achievements, and work to change those things that are not working. This tool is designed to help you engage in such per-sonal reflection and assessment; it is also designed to assist you in developing personal strategies for learning and growth.

Personal growth around diversity and equity does not happen at once—through one training or a couple workshops; it takes place over months and years—as our experiences and knowledge deepen and expand our awareness and our capacities. The change process starts with each of us taking steps to recognize our strengths and our biases. It is deepened and sustained as each of us learns to respect and appreciate differences and as we work with others to create a more democratic and egali-tarian society. Our hope is that you won't just use this tool once, but rather that you will use it re-peatedly over time. And as you track your own learning over time, you will modify and strengthen the tool to meet your changing needs.

Included In This Resource Kit:

- Introduction (page 1)

- Directions (page 2)

- Self-Assessment Tool (Insert)

- Guidelines for creating your own learning plan (page 3)

- Resources for supporting your learning and growth (page 4)

The Foundation For This Assessment Tool

This assessment tool is designed to promote the implementation of nine interrelated principles that have emerged out of the experiences of people engaged in community-building work across difference throughout the United States. The principles were identified with the help of an ethnically, geographically, and professionally diverse 35-person advisory panel (through a series of interviews, focus groups, and forums conducted in the late 1990's.

Since that time, the principles and the assessment tool have been used, refined, and expanded by a similarly committed and diverse number of practitioners and organizational development specialists working with diversity and equity advocates in the fields of: community leadership development, community organizing, early childhood development, family and community health, youth leadership development, religious and inter-faith organizations, and philanthropy.

Although these principles have been embraced by many in these sectors, we at California Tomorrow know that these nine principles are not "the only ones" or even "the best ones" to assist everyone who is working to make their organizations and communities more inclusive and equitable. In that spirit, we invite you to modify or add to these principles as your own experiences, values, or the particulars of the context you work in demand of you.

Principles For Promoting Equity and Embracing Diversity

Draw Upon the Assets of Diverse Peoples and Groups: I build upon the assets of my own ethnic, cultural (or heritage, religious, etc.) group, and I value the strengths and resources of people from other backgrounds.

Build Personal Relationships and Trust: I nurture personal connections and trust across lines of race, culture, gender, and class.

Treasure and Develop Cross-Cultural Connections and Leadership: I value the knowledge and skills of people who understand and draw upon their own group's history and culture, and are able to work respectfully and effectively with other groups.

Recognize Multiple Realities and Identify Common Ground: I work to develop a deeper understanding of the different value systems, perspectives, ways of doing things, and challenges that exist for the various groups within my community. At the same time, I foster opportunities for people to identify common values, goals, and needs across lines of race, culture, gender, and class.

Facilitate Full Community Participation in Decision-Making: I support the right of all people to be involved in deciding what happens in their own communities, whether those communities are defined by geography or collective interest.

Promote Inclusion: I work to ensure that racism, sexism, language bias, class biases, or other forms of marginalization/domination do not create barriers for full participation .

Stand Up Against Bias: I strategically address individual behaviors, institutional practices, and public policies that result in an unequal distribution of goods, services, and power.

Support Ongoing Personal Growth Around Diversity and Equity: I work to regularly deepen my own understanding about diversity and equity issues related to race, culture, gender, and class; and I work to expand my capacity to work with people of diverse backgrounds.

Take Stock: Holding myself accountable to the different racial, cultural, gender, and economic groups in the community, I regularly assess how effectively I work with these groups and how effectively I am addressing issues of diversity and equity.

Ways to Use Tool:

1) Read through the principles. Consider how your own values and beliefs connect to the principles. Ask yourself if you agree with the principles or the beliefs and values that underpin them. Think about how you generally live out the principles in your interpersonal, professional, or societal spheres of influence. Discuss or share your reflections with a trusted colleague or friend.

2) Choose 3-5 of the principles you mostly strongly believe in and answer the questions associated with those principles in the assessment tool that is provided in this tool kit.

3) Use your reflections and observations to develop a personal learning strategy (see opposite page) to deepen your knowledge and capacity in 1-3 areas you may want to strengthen.

You must be the change you wish to see in the world.

Mahatma Gandhi

Creating Your Personal Learning Strategy & Plan

Learning styles and approaches are as diverse as the communities we are trying to bring together through this work. We suggest you take the time to consider what styles and approaches best suit your own sensibilities, needs, and interests. Whether you feel best learning in a formal educational setting (e.g., a classroom style training or workshop), assimilating knowledge through reading a book or watching a film or video, or learning by taking action (e.g., participating in a variety of social, cultural, or community activities), there are plenty of groups and resources to assist you in your personal development journey. We have included contact numbers for some of these resources on the last page of this toolkit. These resources are intended to be used as entry points for your own personal searches.

The following questions are intended to provide you with a framework for utilizing the insights you gain from your reflection and assessment with the Change Starts With The Self Tool. Take a few minutes to think about and write down your overall reflections, observations, objectives, and plans.

What are two or three strengths that I bring to this work on diversity and equity? In what ways could I build on these strengths? In what ways could I deepen my knowledge or capacities in this area?

Are there particular principles or indicators in this tool that prompted or provoked a strong emotional reaction for me? What are those feelings? Are my feelings a response to a past experience dealing with others on issues related to this principle? Or a reaction to a perceived bias or lack of understanding that underlies the principle or question? What can I do to respond to my feelings in a way that honors my own experienced and perspectives and at the same time helps me to understand and honor the experiences or perspectives that are provoking those feelings?

What are two or three gaps (or challenges) that I want to work on over the next six months or year?

Activities I will undertake to address these gaps or challenges over the next six months or year (choose as many as you wish):

( ) Read the following books or articles: _____
( ) View the following films/videos: _____
( ) Meet with and discuss these issues with: _____
( ) Attend a lecture or presentation on: _____
( ) Participate in the following training or workshops: _____
( ) Participate in the following cross-cultural community events: _____
( ) Join or organize a small discussion or study group focused on: _____
( ) Volunteer with the following organization that promotes or organizes cross-cultural work in my community:
    _____, _____.
( ) Join or support the work of the following organization that advocates or organizes for the equity concerns of
    a group that is marginalized or discriminated against in my community: _____
( ) Other activities: _____
( ) Other activities: _____
( ) Other activities: _____

5. I will sit down again on _____ to evaluate my progress and development and to update my
    learning plan.

About This Tool:

This self-assessment tool (I-Tool) is part of a set of strategies and tools California Tomorrow has developed and refined for use by change agents and advocates who are working to change their organizations and communities. Although it can be used independent of other exercises and resources, the I-Tool is designed for use within a holistic set of personal and organizational change strategies organized groups of individuals can draw on to:

- Initiate and sustain an organization-wide dialogue about diversity and equity concerns within their organizations;

- Carry out individual and collective assessments of their personal and organizational inclusion and equity principles and practices; and,

- Organize and conduct a series of participatory strategic planning and program development activities to move from assessment to action.

Diversity and Equity Resources:

Because the area of "diversity" is a growing field with so many education and support organizations, agencies, and consultants, you will need to be careful in researching and selecting the resource that most closely matches your needs and objectives. If your City or County has an Human Relations or Human Rights Commission, you may want to contact them first to seek assistance in learning about resources in your community. If your region does not have such a commission, the following organizations may prove helpful in identifying a resource close to you.

Diversity & Anti-Racist Training:

The Network of Alliances Bridging Race & Ethnicity (www.jointcenter.org/nabre/)

The National Conference For Community Justice (www.nccj.org)

The (ADL) World of Difference Institute (www.adl.org)

Dialogue to Action/Leadership Development/Community Organizing Resources:

The Study Circles Resource Center (www.studycircles.org)

Project Change (www.projectchange.org) & Institute for Democratic Renewal (www.race-democracy.org)

The Leadership Development in Inter-Ethnic Relations Project (www.apalc.org)

The Center for Third World Organizing (www.ctwo.org)

The Southern Institute for Education and Research (www.tulane.edu/~so-inst/)

Topical Research & Organizational Capacity Building Resources:

Minnesota Council Foundation's Toolkit For Creating an Inclusive Grantmaking Organizations (www.mcf.org)

National Grantmakers Association's National Study "Diversity Practices In Foundations" (www.nng.org)

National Committee for Responsive Philanthropy (www.ncrp.org)

The Aspen Roundtable (www.aspenroundtable.org); see Training For Racial Equity & Inclusion A Guide to Selected Programs (Shapiro, Ilana).

Council on Foundations Diversity & MultiCultural Issues Research (www.cof.org)

Colorlines Magazine & The Applied Research Center (www.arc.org)

Institute on Race and Poverty (www1.umn.edu/irp/)

VALUING DIVERSITY VS. MOVING TOWARD INCLUSION

Valuing Diversity	Moving Toward Inclusion
Organization states that it values diversity	Involves a stated value and commitment to diversity and inclusion that is tied to an organizational mission or purpose
Senior leadership feels that diversity is inherently good	Senior leadership is committed to diversity and inclusion and models and leads from those values
Caring that diversity exists	Setting up organizational structures and systems that allow for an environment of equity and inclusion
Openness to diversity among people	Implements actual strategies and tools to increase and support the diversity of its members
Resists any disruption to the status quo	Takes into account that the organizational culture might be (will be) disrupted and plans accordingly
Is committed to organizational stability	Is committed to organizational change
Requires no action or tangible results	Requires action, accountability, and results
Utilizes disconnected short-term activities	Uses concerted, organized, strategic long-term efforts
Relatively easy position to take	Very difficult work to be done

Adapted from *Managing Cultural Diversity in Sports Organizations: A Theoretical Perspective,* Doherty and Chelladurai (1999)

D5's Self-Assessment for Foundation Diversity, Equity & Inclusion (DEI)

D5's Self-Assessment presents five strategic action arenas of proven-effective policies and practices used by foundations across the country to advance DEI. D5 invites your foundation to complete the assessment to: (1) capture your current situation, (2) spark conversations about DEI and what is possible, and (3) identify tangible action steps that will improve your foundation's effectiveness and strengthen its relevance in our increasingly diverse society. Please note: D5 and this assessment focuses on four dimensions of diversity (gender, race, sexual orientation, and ability). For more information visit: d5coalition.org.

D5

STEP #1. *Please circle the answer that best describes your foundation:* **Y=Yes   N=No**

1. Expressed commitment to DEI	Gender		Race		LGBT		Disability			
a) Our vision, mission statement, and/or strategic plan includes an expressed commitment to opportunity on the basis of…	Y	N	Y	N	Y	N	Y	N		
2. Authorization of DEI in organizational policy	Gender		Race		LGBT		Disability			
a) We have a policy for Board and staff diversity that covers…	Y	N	Y	N	Y	N	Y	N		
b) We have a policy for investment advisor and vendor diversity.									Y	N
c) We have a policy for asset investment that supports DEI.									Y	N
d) Our grantmaking policy expects *all* grantees to address DEI.									Y	N
3. Implementation of DEI practices in operations	Gender		Race		LGBT		Disability			
a) We actively engage diverse members of the Board and staff (e.g., distribute key assignments, capitalize on their strengths and networks).									Y	N
b) We work to build an increasingly diverse pipeline of potential Board and staff members on the basis of...	Y	N	Y	N	Y	N	Y	N		
c) We work to expand the pipeline for greater diversity among investment advisors and vendors.				-					Y	N
d) We actively work to diversify our donors on the basis of...	Y	N	Y	N	Y	N	Y	N	N/A	
e) We have intentional processes for Board, staff, advisors, vendors to become DEI-informed and competent (e.g., orientations, training).									Y	N
f) Our grant and vendor payment processes accommodate recipients with limited organizational cash flow.									Y	N
4. Implementation of DEI practices in grant-making	Gender		Race		LGBT		Disability			
a) We systematically access the perspectives of diverse grantees and constituent groups in the areas of...	Y	N	Y	N	Y	N	Y	N		
b) We understand the ways in which inequities are produced and maintained on the basis of…	Y	N	Y	N	Y	N	Y	N		
c) We understand how the various dimensions of diversity intersect/interact.									Y	N
d) We have specific investment strategies that address individual, institutional, and structural barriers on the basis of…	Y	N	Y	N	Y	N	Y	N		
e) We intentionally fund diverse programmatic leadership on the basis of...	Y	N	Y	N	Y	N	Y	N		
f) We factor into our funding decisions the grantee's ability to advance DEI.									Y	N
g) We fund capacity-building for diverse groups on the basis of…	Y	N	Y	N	Y	N	Y	N		
h) We use our organizational advocacy and our position in the community to advance DEI.									Y	N
5. Use of accountability mechanisms to monitor DEI	Gender		Race		LGBT		Disability			
a) We regularly collect, disaggregate, and publish data on Board, staff, advisor, vendor, grantee diversity by…	Y	N	Y	N	Y	N	Y	N		

STEP #1 Continued. *Please circle the answer that best describes your foundation:* Y=Yes N=No										
	Gender		**Race**		**LGBT**		**Disability**			
b) We analyze the data in (a) above to understand how to close gaps where disparities appear.									Y	N
c) We analyze all key operational decisions to determine their impact on the basis of…	Y	N	Y	N	Y	N	Y	N		
d) We analyze all key programmatic decisions to determine their impact on the basis of…	Y	N	Y	N	Y	N	Y	N		
e) We assess communications and products for appropriate messaging with regard to…	Y	N	Y	N	Y	N	Y	N		
f) We have mechanisms for senior management accountability for DEI performance.									Y	N
g) We have mechanisms for staff accountability for DEI performance.									Y	N
h) We have mechanisms for investment advisor and vendor accountability for DEI performance.									Y	N
i) We have mechanisms for grantee accountability for DEI performance.									Y	N
j) We incorporate our DEI commitment into new staff/Board/vendor/advisor/grantee orientations.									Y	N

D5

STEP #2. *Compile your DEI scores here.*

Of the 13 Gender items, how many are:	Of the 13 Race items, how many are:	Of the 13 LGBT items, how many are:	Of the 13 Disability items, how many are:	Of the 16 items above, how many are:
YES ____	YES ____	YES ____	YES ____	YES ____
NO ____	NO ____	NO ____	NO ____	NO ____

D5

STEP #3.
Determine what actions you might take next to advance DEI within your foundation.

Questions to guide next steps:
→ Across the four categories of diversity, where are you least strong? D5's PPP scan offers tools and resources for each category to guide you on how to strengthen your commitment.
→ Wherever you have circled No in the right column, this is an area where intentional action can advance DEI. Please see the models, tools, and guidance for these areas in D5's PPP scan.
→ Of the five strategic arenas for action identified in the blue shaded areas, where are you strongest? Consider sharing your actions with the broader philanthropic community. What lessons did you learn in taking these actions to advance DEI? What difference has it made?

For D5's scan of Programs, Policies & Practices (PPP) and more for more information and resources visit:
www.D5coalition.org