



Fall 2003

Dear Colleagues:

We are pleased to share with you documentation of the Diversity Initiative's impact in the Greater Boston nonprofit community. In 1990, the Diversity Initiative was established to provide technical assistance and funding to nonprofit organizations committed to creating greater racial, ethnic and cultural diversity within their staff and boards. Since that time, through the work of nearly 80 organizations, the Diversity Initiative has evolved into a community of practice which reinforces that achieving diversity is an ongoing process that will continue to both challenge and reward.

This is the full report of the fourth formal evaluation of the Diversity Initiative. We offer this information as evidence that organizational diversity is an achievable goal that is well worth the effort. Organizations involved in the Diversity Initiative point to significant benefits. The process itself strengthened communication and understanding among and between staff and board members. Greater staff diversity led to a more stimulating work environment and to more effective delivery of programs and services.

We are grateful to all the organizations and consultants who have participated in the Diversity Initiative. Without their leadership and their willingness to share both positive and negative aspects of their work, we would be unable to share this exceptional information with you. Thank you to our evaluators, the Diversity Initiative Steering Committee, the brochure designer and the staff and board of Third Sector New England.

Tyra B. Sidberry
Director

Diversity Initiative Evaluation Spring 2003

Deborah Linnell and Erline Belton, Evaluators

Contents

I. Introduction	page 2
Methodology	page 2
Findings Summarized	page 3
Recommendations	page 7
II. In-Depth Findings: Consultant Focus Group	page 10
III. Surveys – In-Depth Findings, Synthesis	page 16
IV. Case Studies – Lessons from the Field	page 35
Codman Square Health Center	page 35
Community Action Agency of Somerville	page 38
The Family Center	page 40
United for a Fair Economy	page 43
V. Telephone Interviews – Long Term Impacts	page 46

Appendices:

- A. Tools: Survey; Critical Questions as developed by the Steering Committee; Logic Model as developed by Evaluation Team; Criteria for Choosing Case Study Participants; Consultant Focus Group Questions
- B. List of Survey Respondents
- C. List of Evaluation Team Members
- D. Career Brief, Deborah Linnell, Linnell & Associates and Erline Belton, Lyceum Group

I. Introduction (Methodology, Findings, Recommendations)

The Diversity Initiative is nearly 15 years old having begun in the fall 1987 by a group of funders who formed the Human Services Personnel Collaborative (HSPC). HSPC was conceived as a vehicle to provide leadership in response to problems faced by nonprofit human service agencies in recruitment and retention of staff, particularly staff of color.

The Diversity Initiative was created in 1990 as a result of HSPC's efforts to address more specifically recruitment and retention of staff of color.

The Diversity Initiative seeks to foster racial and cultural diversity so that it becomes an ongoing part of organizations. It does this primarily by funding approximately ten organizations every two years to undertake diversity change initiatives. It also provides technical training to these grantees and disseminates information (mostly gathered through a series of evaluations) to a broader audience through publications and presentations.

The Mission: To increase effectiveness and systemic change within individual organizations and the nonprofit sector by promoting cultural inclusion and organizational diversity.

Methodology

The evaluation methodology was a mix of a participatory and outcome evaluation. The evaluation was participatory in that key stakeholders were involved in the majority of steps. It was outcome oriented in that the key stakeholders worked with the evaluators to develop outcomes via a logic model (for the Diversity Initiative itself, versus the grantees) and these were then tested through several tools – including surveying of all current grantees and several grantees from the past; a telephone survey to several past grantees; a focus group with consultants; and six case studies with grantees from different time periods.

Either the Steering Committee or the Evaluation Team participated in the following:

- ❑ Defined critical questions to be explored through the evaluation.
- ❑ Defined a “theory of change” and logic model – the outcomes of which also helped to further refine questions to be reviewed through the evaluation (see logic model – Appendice A, Exhibit One and “Theory of Change” below).
- ❑ Defined and helped to develop tools for gathering information.
- ❑ Defined selection criteria for case study groups.
- ❑ Reviewed the draft evaluation and provided feedback before broader dissemination.

The evaluators also met with staff separately on several occasions; reviewed the existing files for background information on grantees and the Diversity Initiative itself; and conducted a web-based literature search on other funding sources of diversity efforts.

The Theory of Change as established by the Evaluation Team of the Diversity Initiative is as follows:

The Diversity Initiative creates a community of practice and learning through financial and technical support that enables nonprofits individually and collectively to become more effective and responsive as they increase inclusion through policies and delivery of programs in order to shift leadership and influence in their organizations and communities.

This “theory”¹ and the accompanying logic model (Appendix A, Exhibit One) are integral tools to the evaluation as they raise assumptions about outcomes that were tested through the evaluation.

Findings Summarized

This information was gathered through surveys (16 of 22 responding), a focus group with consultants (8 present), files and literature review – including a comparison to existing evaluations, several telephone interviews and finally 6 case studies. This section *summarizes* the findings from all of these points of information and includes analysis. The findings are fully detailed later in this report, along with a summary of the consultant focus group and four case studies.²

Overall:

- ***Diversity work is hard, it is rewarding – it requires personal growth and organizational growth and resources. The groups funded by the Diversity Initiative take the work seriously. The majority work through the challenges to, in some cases, a profoundly changed organization.***

Why do Organizations Get Involved with Diversity Work?

- Organizations get involved with diversity work for either reactive or proactive reasons. There is ***a trend towards more and more groups (over half) incorporating this work proactively by planning for it or as part of fulfilling their mission.***

In 2003, less than half the groups took on diversity work reactively. A number of groups engaged in diversity work due to internal issues raised by staff (and always at the staff level, no source cited tension coming from the community, clients or board as a place that pushes diversity work). ***This represents a shift since 1996 where more organizations chose to do the work in reaction to issues raised by staff members or shifts in community demographics.***

¹ The theory was developed to guide the evaluation. The staff and steering committee have formally adopted this theory.

² Six case studies were done. The following organizations gave permission for their publication: United for a Fair Economy, Codman Square Health Center, Community Action Agency of Somerville, and The Family Center.

On a smaller scale, pressure from changing demographics in the community or clients, or funder accreditation requirements caused groups to take on diversity work.

What Do They Accomplish with some Financial Support?

Organizations accomplished the majority of “outputs” expected of the Diversity Initiative: creating a Diversity Committee, hiring a consultant, assessing the need, making a plan of action, conducting training, working on policy changes – including many changes to hiring practices. It is clear that the nonprofits accomplished many actual steps with the support of the Diversity Initiative – and that for some³ this has led to the deeper outcomes of:

- An organizational language of inclusiveness that becomes organic and rooted with staff (not necessarily the board or constituents)⁴
- Increased diversity on staff and board
- More inclusive “systems” – for communication, decision-making, structure, as policy changes take root
- Shifts in entire organizational culture to be more inclusive (this shift occurs after language is created and policies/systems are changed)

In several cases, the organizational shift has also shifted leadership (and possibly power) – where organizations that were predominately white, with few people of color on staff a decade ago, now have African-American CEOs.

Groups accomplish more now with funding than they did before because they (and the DI) are building upon the lessons learned by previous grantees. Growing skills and knowledge among consultants also helps groups start well. Early grantees spoke to the work in the early 1990s where there were some missteps, for instance, disastrous all staff retreats where communication broke down and people became polarized. Groups (with guidance from the DI) are better at making a good first match with the consultant than in previous years.

A “community of knowledge and practice” around diversity work has emerged in the Boston area – as a result of the DI. Some of these practitioners seek venues in which to share with peers their experiences to further enrich their learning and growth – a convening role the DI could consider.

Finally, while organizations stated that they learned how to create a definition of diversity, very few had actually done this, including groups surveyed from the 1993 and 1999 grant cycles. Defining diversity was an assumed outcome of the Evaluation Team – but the assumption is not borne out through the surveys or consultant’s focus groups as the actual practice in the field.

³ The full evaluation cites the actual achievements and other survey findings by number or percent of organizations responding. The summary statements are based on these actual numbers.

⁴ For example, word choices like Holidays in the place of Christmas, partner instead of wife or husband, or whatever language an organization develops and routinely uses that makes individuals in its community feel included rather than excluded.

What Drives Success?

In 2003, the success drivers for surveyed groups were primarily the presence of a Diversity Committee and the commitment of the Executive Director. Leadership and management support are still critical, but less so now that Diversity Committee's shoulder the work. Other drivers of success for those surveyed included: a plan for diversity work; an initial assessment; the ability to have conversation across difference; and have these conversations become action.

The board of directors appears to factor very little in the success of these more recent initiatives, while the board was one of the key drivers of success identified in the 1996 evaluation.

Consultants included the following as key drivers for success:

- Goal definition for the diversity process (that is a plan)
- Assessment
- Small accomplishments that lead to systems change

Case studies speak nearly unanimously to the importance of “conversation” and “dialogue” and providing the space for staff to do this safely, to bridge difference and build bonds and most importantly build a common language for diversity that can provide the language for dialogue further down the line when tensions or issues arise.

Where are the Barriers?

Dramatic, strong emphasis was put on three areas of barrier that all have to do with time and resources:

- ***Lack of resources***
- ***Too little time***
- ***Competing priorities***

While the case studies and consultants uncovered other areas of barrier, it was striking how strong the emphasis was on time and resources for surveyed grantees (75% or above saying these were barriers). The other areas of barrier rated in the surveys (approximately 50% of groups cited these): budget cuts and decreases; burnout; organizational complexity; and staff and board turnover.

Consultants also rated resources as one of the major barriers for nonprofits undertaking this work. Some of the other barriers that emerged from consultants and the case studies included:

- Failure to integrate the diversity work with the organization's mission – this one is key and was echoed in several areas.

- Another area echoed by both consultants and with case studies was the notion of the “do gooder” or the well-meaning liberal who thinks they are on the path to change, but still exhibits behavior that indicates a lack of knowledge of what constitutes a truly inclusive organization – or a lack of will to go there. These people are difficult to challenge if they are in positions of power – or difficult to pin down as they may say the right things – but not do the right things.
- Failure to make distinction between oppression (isms, such as racism) and diversity – and the balancing act here for consultants and internal diversity staff, where they were present. If leaders are confronted directly with an issue like racism, the process tends to get shut down quickly. Consultants, in particular, found that it is important to be clear (from the beginning) that diversity work is not a panacea for power issues and oppression within the organization – but it can be a systems approach that will shift the culture in such a way that these issues will be addressed over time. For those in oppressed groups a backlash to diversity work can occur as it is not addressing their issues and concerns directly enough or in a timely manner. This is often where diversity work gets “messy” but working through these dynamics is critical – or barriers arise to further progress.

A Sampling of Lessons from the Field

The consultant focus group and the case studies elaborate upon lessons that have been learned by those on the frontlines of doing this work. What is captured here are those lessons that resonated across at least several groups or individuals:

- ***Diversity work should be anchored in the mission and the diversity work should have its own articulated mission statement.***
- Push organizational and individual comfort zones without doing harm (no more hurtful retreats!).
- ***Learn to talk to each other.*** The ability to communicate across difference is a cornerstone to building trust, awareness, new attitudes – and change.
- ***The Diversity Committee is the most critical driver for success.***
- Organizational decision-makers are also critical: If you do not have the buy-in of the people who make the decisions, real change will not happen – it will be window-dressing – because the conversation has to be converted to policy changes for the work to get truly rooted in the organization.
- Never forget in whose name the organization does business and the reason why it exists – the learning is in the people – let the community and constituents be a guide and a beacon.

Recommendations

The Diversity Initiative is doing excellent work with its core set of activities – there are few recommendations at this level (see “a” below). This may be the time and place to bring its work

to another or different level – increase level of and venue for dissemination of information; create peer learning groups; seek national funding.

a) There are several recommendations for the current program based on feedback from the field of current and past grantees:

- Increase the level of grants – the \$8,000 to \$10,000 range does not purchase enough assistance (often nothing beyond an assessment) *or*
- Leverage the pool of grant funding by considering funding a cohort of co-learning organizations (for instance, have five agencies learn and do together – using one or two consultants).
- Convene organizations more for exchange and peer learning.
- Consider more articulation of the underlying “theory of change” or the broader vision for the Diversity Initiative (some groups spoke to wanting to understand more deeply how their organizational work tied into a larger vision for diversity among nonprofits in Boston).
- Based upon the trend that nonprofits are proactively implementing diversity work and/or incorporating it into strategic plans, the DI might want to dialogue and reflect more deeply upon diversity as capacity building and articulate its importance as a capacity building tool that enhances: communication, staff and leadership development, better adherence to standards, and understanding of change processes that may help the organization when it goes through other change (such as mergers).
- Ask grantees why many do not adhere to having a board member on the diversity committee – then be more stringent if it makes sense to continue with this or drop the requirement.

b) These recommendations are based on observation, analysis, and synthesis from the evaluators:

- Revisit the DI mission statement: change in approaches/language of diversity work has changed somewhat to language of inclusion versus language of oppression. The Diversity Initiative steering committee (or other entity at TSNE) should grapple with what the exact business of the DI is at this point in time and discuss whether or not the mission statement still describes that business clearly.⁴
- Create a strategic plan for the Diversity Initiative within the context of its new umbrella organization – TSNE. Real time shifts in staffing and management workloads are occurring that cannot be captured within this evaluation. The shifts should be articulated, competing priorities for the DI Director’s time fully understood, and the relationship of the DI to TSNE envisioned into the future. This can be summed up in a management plan that accompanies the strategic plan.

⁴ The DI revised its mission statement on October 23, 2003 as part of its strategic planning process. See page 2 for the current statement.

- Create a communications plan for the Diversity Initiative. A communication strategy will clarify messages, audiences and tools for reaching a variety of the DI's audiences. Spending time on defining the DI's audiences (Boston area nonprofits, funders – the third sector in general).
- With the exception of two organizations surveyed, clients, end-users and constituents are not represented in the organization's diversity work. If the DI values this input, it may want to engage funded nonprofits and consultants in a conversation about how to involve those people in whose name the nonprofit exists in the diversity work and plant the seed about why this might be important/useful and disseminate approaches.
- Expand request for funding to national foundations. National funding for this still unique project is possible. Opportunities might be enhanced if a learning circle model was developed and diversity activities aligned more directly with leadership.

II. In-Depth Findings: Consultant Focus Group

Information for the evaluation was gathered through: surveys sent out to 22 organizations (1999 and 2002 grantees as well as a selection of grantees from previous cycles); a focus group with consultants who do diversity work; 6 case studies with current and past recipients of grants; and several telephone interviews with pre-1995 grantees. This information provides the basis for the findings and recommendations – it is presented in depth here.

A. Consultant Focus Group

The Diversity Initiative sent out an invitation to all of the consultants in its database. Eight consultants participated in the focus group⁵ – all were women, seven were white, one African-American. All had years of experience as diversity consultants, two were currently working with Diversity Initiative grantees and the majority had worked with grantees in the past.

The consultants were asked to respond to six key areas of question. This is a summary of the consultant responses, not a transcript of the actual conversation.

1. *From your perspective and experience, what leads organizations to choose to do diversity work?*

Responses:

For “reactive reasons” which included:

- Tension between individuals
- Tension across difference
- Accreditation bodies
- Changing demographics in their service areas
- Funder-driven
- Loss of business/loss of clients

Groups also take this work on for proactive reasons:

- Their mission aligns them to do diversity work
- A sense of social justice

⁵ The focus group was held at Community Change on February 26, 2003. Besides the consultants, the evaluators Deborah Linnell (recorder), Erlene Belton (facilitator) and Diversity Initiative staff Tyra Sidberry and Dakarai Rashada were present. Carol Rinehart of Community Change hosted the meeting, but was also included as one of the consultant informants.

- They know where their organizations need to be in regards to diversity and begin to make plans towards moving the organization in that direction
- Leadership
 - a) someone has stepped into a management role who “gets its” and becomes a proactive driver within the organization
 - b) leadership does not reflect the population being served and the organization begins to plan on how to change this over-time
- Sensitivity to client base

2. a) *What were the first steps in the consultation?*

- Fact finding
- Clarification (this area has multiple levels). Clarification of the project – its scope and parameters; clarification of what the organization wants to achieve. Sometimes the consultant’s role is to bring the organization back to reality – what is truly achievable given their budget (for consultant time and other activities), other competing priorities for the organizations, and people’s ability to sustain the work.
- Helping to set up a diversity committee (who should be on it, logistics and so forth)
- Planning – goals, definitions
- Assessment – focus groups, review of documents
- Training – discussion ensued about the importance of training as an initial step. The majority agreed that some level of basic training at the beginning is good in order to get participants on common ground – particularly in regards to language.

b) *What are the initial supports consultants need to engage in a diversity project?*

- Commitment of resources including: who is going to be assigned the work; is the work valued by leadership – particularly the CEO – is the CEO giving the work credibility by his or her actions.
- Clarity around the role of the diversity committee. The consultants agreed that defining the parameters of decision-making and power held by the diversity committee is key to success. The group must be empowered with some level of decision-making even if that is to decide to make recommendations that are strongly considered by those bodies within the organization that can make final decisions.

If there is a lack of definition regarding the role of the diversity committee and/or the committee lacks “teeth” – the diversity work will not take hold.

In addition and also critically important, the purpose and boundaries of the diversity committee must be established so it does not become a “dumping ground” for every human resource issue or power struggle within the organization. The case studies bear this out. One group in particular had its diversity committee become just such a “dumping ground” –

there was a painful process of revisiting the purpose of the committee and coming back to a more focused agenda and re-statement of the committee's mission within the organization.

Assisting groups from the beginning in defining the committee's parameters by creating a committee mission statement, defining decision-making or recommendation role and establishing the composition are all critical roles for the consultant at the beginning of the engagement.

3. *What have been the consistent drivers for success overall in diversity work?*

- Compassion (consultants need to listen first, be aware of the biases they bring and look at where they interact, meet people where they are, be cautious of being righteous)
- Persistence
- Respect

The above led to a discussion of the importance of working in teams in doing this work – that teams should be racially diverse/multi-cultural. If an organization cannot afford a “team” approach then it's the white part of the team that should be cut out.

Other drivers of success included:

- Identifying where there is enthusiasm (place of leverage for change) in the organization for diversity work.
- Diversity Committee is key – these are the vision holders. “Caring and feeding” of the diversity committee is critical.
- Structure for the committee and the work. If consultants leave the organization with a strong “frame” for the diversity work regarding its structure and systems, then it will be less reliant on actual individuals and the work can survive changes in leadership or diversity committee member.
- Goal definition: being concrete about what can be achieved. If the consultant cannot work with the organization to clarify goals and identify what can be achieved success may not be reached.
- Assessment or a diagnostic period up-front.
- Training or minimally a brief orientation (not all consultants agreed that training is essential to success – but the majority did)
 - a) introduce the language of diversity conversation
 - b) establish common ground
- Small accomplishments that begin to shift the culture. Small success is an important driver of overall success: consultants agreed that it is important to leave the groups with identifiable achievements they can build upon: a strong diversity committee, communication stimulated, a safer space in which to discuss diversity issues by identifying ground rules and structures for behavior.

- Systems change – it’s hard to change the climate without addressing systems issues. Critical to success is addressing systems issues. These changes (in policies, for instance) lead and then the culture begins to change.
- Building internal capacity for the organization to carry on without a consultant.
- Periodic recognition and celebration of results.

One consultant summed up the discussion of success drivers as saying it is important to develop a “strategic diversity plan.” Such a plan would encompass structure and time frames for the work; identify leaders and their roles and responsibility; and identify key strategies (assessment, trainings, systems change).

4. *What are some of the barriers?*

The consultants have found the following barriers to progress on diversity work:

- Reduction in staff due to budget cuts.
- High staff turn-over.
- Leadership that doesn’t really buy-in or even worse, leadership that thinks it “gets-it” but really does not and becomes a hindrance.
- Leader disconnected from the process.
- Dissimulation by leaders – an inability of leaders to take on the language/action of inclusion and difference as it is being defined by the diversity committee or staff through their own personal discomfort, lack of learning or purposely to block progress.
- Actual implementation – the logistics of scheduling meetings, bringing people together to do the work.
- Competing work demands (of staff, of organizations).
- Failure to integrate the diversity work with the organization’s mission.
- Not recognizing new leadership on this issue when and where it emerges.
- Lack of clarity on part of the nonprofit regarding how to engage a consultant and what is truly achievable with the budget.
- Amount of money the group can dedicate to diversity work.
- Lack of true financial commitment by the organization to diversity work.
- Leaders and organizations have no idea how much work diversity work really entails. Their commitment can falter at this point as the realization takes hold.
- Fear of conflict.
- Failure to make a distinction between oppression (isms, such as racism) and diversity – and the balancing act here for consultants. If leaders are confronted directly with an issue like racism, the process tends to get shut down quickly. It is important to be clear that diversity work is not a panacea for power issues and oppression within the organization – but it can be a systems approach that will shift the culture in such a way that these issues will be addressed over time. For those in oppressed groups a

backlash to diversity work can occur as it is not addressing their issues and concerns directly enough or in a timely manner.

One consultant said that the nature of diversity work is to create a state of dis-equilibrium – enough tension to move the group forward until there is change, particularly by the groups in power.

5. *What are the issues for you as a consultant engaging in diversity work?*

- One consultant spoke to the need, as a woman of color, to weigh and measure the amount of diversity work she does in the course of a year – it can be personally painful and she is careful and selective about her work.
- White consultants said that race is an issue – they need to do their own work on their cultural biases and the lens they wear at all times. “What are the limits of my own mindset? My own identity group? What do I marginalize, What do I see or notice?”
- One consultant spoke to the importance of reflecting upon one’s own mindset, staying creative, innovative and fresh. Critical to this process is receiving feedback from colleagues.
- Competency – another consultant spoke to the issues of self-examination in regards to whether or not she is the right match; does she have the skill set for the needs of a particular group.
- Language – this emerged again as a theme. The issue for consultants was working with groups to be clear about where they were going, defining a culture of inclusiveness and diminishing the ability of words and language to become roadblocks. It is critical to make language work in a way that it is understood in a common way.
- Pricing – being paid and valued and weighing this against the needs of the organization and being conscious of class issues that are in-bedded within pricing.
- Saying no.

6. *Lessons to be Shared*

Lessons the consultants wanted to share with others included the following:

- Patience: there is a distance that has to be traveled in this work. You cannot be so driven to have products that you do not have patience for the process and the journey.
- There is no one right way. Individual organizations get inspired by different things and in different ways.
- Messy doesn’t mean failure and comfort does not mean success.
- Understand conflict styles (starting with your own as a consultant); silence doesn’t mean agreement; loudness might be a common way of expressing emotion.

- Diversity work should be anchored in the mission. If people cannot figure out why they want diversity – it isn't going to work. Understand that systemic oppression is a barrier to living the mission.
- Define the successes along the way – pause, reflect, celebrate and have fun.
- Partner to do the work whenever possible.
- Create challenging, but realistic expectations – provide guidance to those groups who have set out to achieve too much too quickly and could become disappointed.
- There is strength in love and compassion. Resistance is not always about hostility. It can be about the inability “to see.” The shift to help people to see is what is critical.
- Be gentle with one another.

III. About the Surveys – In-Depth Findings, Synthesis

Twenty-two current and past grantees of the Diversity Initiative were surveyed. (See Appendix B for list of those organizations surveyed). Sixteen of those 22 or 73% responded.

The survey was based on both critical questions developed by the Steering Committee and hoped for outcomes of the Diversity Initiative’s support as developed by the Evaluation team (see Appendix A for a list of the Critical Questions). The “Theory of Change” and logic model took over two meetings of concentrated teamwork on the part of the Evaluation Team to create. The logic model is presented as Appendice A – Exhibit One.

The Diversity Initiative’s “working”⁶ theory of change is:

The Diversity Initiative creates a community of practice and learning through financial and technical support that enables nonprofits individually and collectively to become more effective and responsive as they increase inclusion through policies and delivery of programs in order to shift leadership and influence in their organizations and communities.

Based on the critical questions and the desired outcomes, the survey was broken into eight distinct sections with 36 questions. Many of the questions had sub-sections and areas for narrative response. In fact, 16 respondents provided over 1000 responses to various questions and sub-sets of questions. The respondents, on the whole, took the survey very seriously and responded with lengthy narrative feedback which is shared back throughout this report.

The Six Areas of Question:⁷

1. The Why of Diversity Work and Who Drives It
2. Feedback on Working with the Diversity Initiative Itself
3. What the Organizations Did With the Funding (or outputs)
4. Outcomes
 - a) Initial Outcomes such as shifts in attitude, gains in knowledge, skills
 - b) Longer-term outcomes: Institutionalization and Leveraging Effects
5. Barriers (to determine what gets in the way of diversity work and compare this with barriers raised in previous evaluations)
6. Leveraging Effects and Sustainability

Organizational Profiles:

⁶ The Evaluation Team developed this theory of change to help support the evaluation process – that is, to define the “intention” of the Diversity Initiative. It is, however, a part of the evaluation that was participatory – lead by stakeholders and is in keeping with the values of the evaluation which called for the “use of the evaluation process as a learning opportunity for all participants, including the evaluator.”

⁷ These six areas were determined by the critical questions raised by the Steering Committee and through the process of defining outcomes by developing a theory of change and logic model to guide the evaluation.

Sixteen of 22 organizations responded. The focus was primarily on those grantees who had never participated in an outside evaluation of the Diversity Initiative before. As a result all the 1999 and 2002 grantees were sent a survey. However, those grantees from the past who have remained in contact with the Diversity Initiative were also surveyed (telephone interviews were set up with 7 non-active past grantees).

1993 grantees: 2 responded

1999 grantees: 6 responded

2002 grantees: 8 responded

Summary of Organizations Responding to the Survey:

The organizations represent a good sample in regards to their purpose and activities (social services, arts, advocacy groups). They are all located in the Greater Boston Area – but some are community-based or even neighborhood focused, while others provide services to a statewide and even national audience. There are more mid-sized and large nonprofits in regards to budget and size of staff.

Budget size:

- Nearly half or 7 of 16 grantees have budgets in excess of \$5,000,000
- Another 2 are in the \$2.5 million to \$5,000,000 range
- 25% or 4 are in the \$1 million to \$2.5 million range
- 3 grantees have budgets of less than \$500,000

After reviewing the following data, readers will see that budget size does not seem to relate to effectiveness of grantee in reaching goals.

Types of organizations: Of the 16 respondents:

- 4 are issue-based advocacy and/or issue-based education organizations
- 3 are social service agencies
- 2 are mental health agencies
- 2 are health centers
- 1 is an arts organization
- 1 is an education organization
- 1 is a social action/social service agency
- 2 are umbrella organizations providing technical assistance to networked organizations (community development and childcare, respectively)

Existing Strategic Plans and Inclusion of Diversity Goals within these Plans

Fifteen of 16 of the organizations have an existing strategic plan and 12 organizations (or 75%) included goals in the strategic plan for building organizational diversity. Three other groups mention diversity in the strategic plan, but it is not operationalized with goals or actions steps. One group does not include diversity in its existing strategic plan.

1. The Whys of Diversity Work and Who Drives It

In the survey four questions dealt with the “why” of getting involved in diversity work and who drives the work – once it is underway. The information provided was rich and is summarized here.⁸

a) *Why get involved in diversity work?*

Organizations enter diversity work for a number of different reasons. But the most evident reasons based on the survey are weighted (75% of respondents checking these areas as among the most important reasons they are involved in diversity work):

- ***Diversity work can enhance the organization’s overall efforts***
- ***An issue was raised within the organization by staff***
- ***There is a strong champion for diversity work within the organization***

A strong fourth reason cited for entering diversity work was

- ***A shift in the demographics of people using our organization***

Funding requirements, the issue being raised by those outside of the organization (as opposed to those within); or a demographic shift in which the organization is seated **were not** strong factors in choosing to undertake diversity work.

b) *Where did the idea originate?*

When asked where the idea for working on diversity originated there was one clear response which was – the paid staff. Among the paid staff the following three were ranked:

- ***Line staff***
- ***Executive Director***
- ***Management***

⁸ For a copy of the survey please see Appendix A. The narrative provides a synthesis of the evaluation responses and analysis by the evaluators based on triangulation of other information (focus group, files review, past evaluations.)

The Board of Directors was also ranked a distance fourth. Less than 25% of the respondents checked the clients, funders, community or the fund development officer as a person(s) who originated the idea.

We can deduce that for the funded organizations, staff drive the need for change in regards to diversity (and probably other types of change) and that the need for change in regards to diversity rested on two areas: the need to address a specific internal issue and for building organizational capacity in this area. One is a reactive response and the other is more proactive.

Respondents offered these narrative responses to the question of “why” do diversity work:

“Not enough people of color in management positions, employment processes, and client sexual orientation challenges.”

“There were significant changes in the available work force pool especially at the entry level. There was a social climate that supported the business case for a Diversity Program.”

“It was becoming obvious to outsiders that ___ was “all white” and that this did not fit well with our mission of serving a community that was becoming increasingly diverse.”

“ ___ demographics shifted due to immigration. The agency wanted staff and board to reflect the new demographics of the low-income population.”

“We serve a very diverse population, our staff is not very diverse and we knew that we needed a long-term strategy to improve our service and workforce.”

“A series of events which lead up to the inclusion of diversity in strategic plan.”

“Staff of color felt they and the communities they were from did not have adequate voice and power within the organization.”

“There were staff members who raised issues of inequity regarding treatment, compensation, management, and other areas. In addition, we wanted to better serve our constituency.”

“While not the board as a whole, a couple of board members, including the chair, took early, active leadership on diversity at ____.”

c) Who and What Drives the Diversity Work Within the Organization?

The who and what driving diversity work are closely linked. In the survey, respondents were asked to rank their top three reasons that diversity activities take place. Again three areas strongly emerged as drivers of the work:

- 1) *The continued presence of a diversity committee that keeps the organization on task – ranked much higher than other areas with many number one votes*
- 2) *commitment of the executive director followed closely by*
- 3) *commitment of line staff*

Other drivers of the work included (in rank order):

- 4) *Strategic plan (diversity is stated as a goal of the organization)*
- 5) *Issues arose that needed to be addressed*
- 6) *Continued presence of a consultant who keeps the organization on task*

Other drivers (less than 25% of responses) included: funding reasons, commitment of the board of directors, constituency expectation.

When groups had to rank only one individual, group or entity as the key driver – they ranked overwhelming – the diversity committee with 10 out of 16 responding. Interestingly, when forced to choose just one key driver the executive director received no votes, nor did the board of directors. After the diversity committee, line staff received 3 out of 16 votes as did “diversity position” (there are agencies among those funded that have a distinct diversity position within the organization). Consultants and management received one vote each.

2. Feedback on Working with the Diversity Initiative Itself

Feedback on several areas of questions regarding the support provided by the Diversity Initiative was highly positive.

Before receiving the grant, the vast majority of respondents (13 out of 16) had not requested technical assistance from the Diversity Initiative and 12 out of 16 had not used the resources at the Community Change, Inc. library.

Of 16 respondents, only one responded “no” to the adequacy of the technical assistance provided by Diversity Initiative staff during the grant period. Two others did not request it, and the remaining 13 all felt it was adequate – with some noting that it was more than adequate and very helpful.

Overall, grantees are highly satisfied with the technical assistance provided by the staff of the Diversity Initiative. But they did offer some advice:

- Articulate the goals of the Diversity Initiative itself more clearly in the first meeting (and subsequent meetings) with grantees.
- Create times for increased peer sharing and learning.

- Articulate more clearly what technical assistance is available and to whom (what is the range of technical assistance that is available, at what frequency, to which organizations and for what reasons).

Size of Grants

While 9 of 16 grantees stated that the grants were adequate – there was quite a bit of feedback from 7 other respondents.

Several of the grantees stated that the start-up work with the consultant quickly ate up the average grant of \$10,000 – this did not enable them to use a consultant beyond start-up period. Others supplemented the grant with as much as \$10,000 to \$15,000 more per year. One grantee wrote, “Money from initial phase was substantial and allowed us to do an assessment. However, we were not funded adequately for follow-up. We had to find free trainings and use board members.” Another grantee from 1999 was very happy for the existence of the Diversity Initiative but felt that “there is never enough funding for this type of activity.” ***Two years of funding at \$10,000 per year per each grantee would more adequately cover the true costs of assessing, planning, implementing, training and evaluating the projects.***

Later in “barriers” lack of resources emerged as one of the top three barriers.

3. What the Organizations Did With the Funding

In essence, whether it was a 1993, 1999 or even a 2002 grantee, the groups had accomplished most of what was expected of them in regards to baseline activities.

- | | |
|--|---------------------------------------|
| • Identifying a point person: | 15 out of 16 |
| • Creating a diversity committee: | 14 out of 16 |
| • Conducting a needs assessment:
this being among the most recent grantees) | 14 out of 16 (with the two not doing) |
| • Hiring a consultant to assist in the work: | 14 out of 16 |
| • Holding an internal training: | 14 out of 16 |
| • Attending an external training: | 10 out of 16 |
| • Created an organizational plan for diversity: | 15 out of 16 (with one in process) |
| • Beginning implementation of the plan
begun implementation by the end of year one) | 9 out of 16 (Six of those 9 had) |
| • Creating a plan for sustaining the diversity work
beyond the grant period: | 11 out of 16 |

One of the early 1993 grantees had completed a plan – but never implemented it and did not have a plan for sustaining the work. Resistance from the board is cited as a key issue here although paid staff keep the flame of diversity alive. The case studies point out that multiple champions and commitment of those who have the power to make decisions is key.

Activities/Outputs that did not occur:

Definition of Diversity

Of interest, the Evaluation Committee and Diversity Initiative staff feel that an agency wide “understanding” of a definition of diversity should be an outcome of year one for grantees. The output being the actual creation of a definition and the indicator is that people in the organization, across various strata, can define diversity for the organization. Only 6 of 16 groups reporting said that a definition of diversity had been developed. Only 4 of the 1993 and 1999 grantees had a developed a definition of diversity (one was in process). Three of the 2002 grantees had a developed a definition of diversity for their organization.

There is a disconnect between what the Evaluation Team perceives as one of the key outcomes of the first year of the work – “a widely understood definition of diversity” and what is actually happening.

As with the requirement for a cross-function diversity committee, the Diversity Initiative may want to be more directive in regards as to why it feels this outcome is important and/or create a dialogue with grantees about why developing a definition appears to not be a natural stepping stone within the organization’s diversity work.

Theory of Change

Only one group in 2002 (and one with a small budget and staff) had developed a “theory of change” to guide its diversity work. Using a “theory of change” as a guide to change processes is a relatively new practice which likely explains the lack this activity.

Completing Diversity Work

Finally, **none** of the respondents checked that they had:

- Completed implementing the plan (with one respondent saying “it will never be completed in our lifetime”)
- Ended diversity work with completion of plan
- Ended diversity work at the completion of the grant

This is a positive result – as the Diversity Initiative emphasizes that those who have a true understanding of the nature of diversity work – also understand that it is a never ending process.

The 16 responding organizations have gained this knowledge through this project or elsewhere -- under-scored by the fact that so many (11 out of 16, including 5 out of 8 2002 grantees) had created a plan to sustain the diversity work beyond the grant period.

4. What Have Been the Short and Mid-Term Outcomes of these Activities?

A series of questions were asked to unearth what had changed in the organization in regards to awareness, attitude, knowledge and/or skills gained in regards to creating a diverse organization. Another set of questions uncovered what actions had been taken as a result of new knowledge and skills. Finally, a set of questions was developed to surface any longer-term outcomes these actions had engendered (such as leveraging effects or shifts in how decisions are made). These questions grew out of the logic model developed by the Evaluation Team where overall outcomes for the Diversity Initiative were identified. (See Appendix A, Exhibit 1).

a). Initial Outcomes such as shifts in attitude, gains in knowledge and/or skills

Shifts in Attitude

The majority of organizations had experienced a shift in attitude with only one saying this had not occurred (and that being a previous grantee) that said, “Our organization is revisiting the issue of diversity after having received a grant about eight years ago. In many ways, we’re starting from scratch, since the Board has not been through a diversity change process.”

With the exception of this one organization, 15 of the 16 respondents noted various shifts in attitude.

9 of 15 noted shifts in behavior

9 of 15 noted shifts in conversation

10 of 15 noted shifts in practice, with two noting that the shift in practice was in process as they developed new policies.

Where the shift is most visible

All 16 responded, (including the group cited previously that did not see a shift):

Line staff	9 of 16
Diversity Committee	8 of 16
Executive Director	7 of 16
Management	7 of 16
Board of Directors	4 of 16
At all levels	4 of 16
Volunteers	1 of 16
Other: youth leaders	1 of 16

As found in the 1996 evaluation, the first level of shift occurs with line staff (and the diversity committee). The fact that the diversity committee must cross levels within the organization probably brings in both the Executive Director and managers as others where the shift is most

visible. The board of directors scored less highly than other leadership areas as a place where a shift in knowledge is most visible.

Has Knowledge Been Gained?

Each group replied positively that knowledge had been gained in how to create a diverse organization – although one group wrote that the knowledge is not often applied.

Where Knowledge is Most Visible

Fifteen of 16 groups were able to name where knowledge was most visible and not surprisingly, management and the executive director (along with the diversity committee) rate higher than line staff as “having knowledge on how to create a more diverse organization.”

- Diversity Committee 10 of 15
- Management 10 of 15
- Executive Director 9 of 15
- Line staff 8 of 15

Again, the knowledge is most deeply held by these levels within the paid staff. Other groups of people within the organization had gained knowledge at much smaller rates:

- Board of Directors 4 of 15
- All levels of the organization 3 of 15
- Volunteers 2 of 15
- Consumers 1 of 15

Knowledge and/or Skills gained

For any strategy, the gain in knowledge and skills is a critical platform from which change can occur. Even the 2002 grantees had gained knowledge and skills across many areas. One group did not respond.

- Diversity work takes time 15 of 15
- There will be barriers in creating a diverse organization 15 of 15
- The barriers are worth working through (see comments below) 11 of 15
- How to choose a consultant 13 of 15
- How to identify that there is a good match with a consultant 9 of 15

- How to define diversity process)⁹ 11 of 15 (two more in
- How to assess the need 11 of 15
- Create a plan of action to address gaps in diversity 10 of 15
- How to act upon a plan that addresses gaps in diversity 5 of 15

- Policy change was needed 9 of 15
- The organization had to re-consider who should be involved in decision-making 4 of 15
- How to identify outcomes that could result from not working on diversity 3 of 15

- How to bring issues to the table 13 of 15
- How to have a dialogue on the issue of diversity 13 of 15
- How to translate dialogue into action 9 of 15 (with one in process)
- Healthy tension can move a group forward 12 of 15

The ability to raise questions and what happens as a result

Thirteen of 15 groups said they have learned how to bring issues to the table and have a dialogue about diversity, when asked if the organization has an actual process for bringing diversity issues out into the open less than half of that number (7 organizations) said that an actual process exists; another 7 said that sometimes there is a process (and two said there was no process).

Those groups that checked “no” or “sometimes” were asked to elaborate – here are some of those responses:

“One barrier for us has been the role of power dynamics. Some staff may not feel comfortable raising diversity issues concerning their relationship to supervisors/leaders within the organization. Another barrier has to do with trying to strike a balance between confidentiality of personnel issues and full disclosure of grievance held by staff.”

“Given that trainings have not happened yet, leadership and constituents lack a common framework/language/understanding to fully discuss diversity issues.”¹⁰

⁹ Interestingly, while 11 groups learned how to define diversity (with two others in the process), only 6 of 16 had reported when asked about actual accomplishments that they had developed an actual definition of diversity. This may speak to the knowledge actually gained versus “the doing.”

¹⁰ See Case Study for The Family Center on page 41 for an elaboration on the importance of developing a common language and framework for discussion of diversity issues.

“A formal process to address diversity specifically has not been established yet. This is a goal for the Director of Diversity. However, there is a general procedure in place through the Human Resource office to raise grievances.”

“Sometimes action is taken, but not always effective, open dialogue is difficult.”

“It happens when we do action planning. At other times, issues may emerge. There is an Affirmative Action/Diversity Coordinator.”

“We are creating a process. We used debriefs to open space for discussions of issues – it will be ongoing.”

“Usually open discussion, although some areas are still not well discussed. Sometimes action is taken, often depending on the budgetary situation.”

What Happens When Issues are Brought Forward?

The survey then went on to ask what happened when issues were brought forward:

Ten of 15 responded that there is an open discussion; another 5 said that sometimes there is an open discussion; and one did not respond.

Of those 15 who said there was an open discussion, only 4 said that action was then taken – with another four saying “other.” Those who checked that “action is taken” are among the agencies funded in 1993 (one) and 1999 (three). It makes sense that an organization’s ability to take action on diversity issues would take time – and be based on a foundation of assessing, developing working/communicative relationships through the diversity committee, and developing a common language about diversity. Still, it is surprising that while 66% of the groups responding have found a way to raise up the issue of diversity, slightly over 25% have found concrete ways to put discussion into action.

Those who checked “other” wrote the following:

“Sometimes action taken, but not always effective. Open dialogue is difficult.”

“Varies, usually open discussion although some areas are still not well discussed. Sometimes action is taken, but often depends on the budget situation.”

How Has Knowledge and Skill Translated Into Practice?

Groups were asked about policies or practices that had changed and they reported myriad concrete changes. The majority of change in practice was located in the three areas of “people practice” including hiring, board development and personnel policies. However,

practices in outreach and education also ranked very high as an area of change due to diversity work.

Less change had occurred in volunteer practices, marketing and public relations, community and/or individual advocacy, fund development, the by-laws or use of vendors.

- Hiring Practices: 14 of 16 responded that there were changes in hiring practices. Of these nearly all (11 of 14) changed their advertising practices; 9 of 14 changed their supervision and evaluation practices; and many (8 of 14) changed their hiring process; a smaller group changed the practice of who selects in hiring (5 of 14); several changed their new staff orientation practices; and the same amount altered their training of new staff (4 of 14 in each case); finally 3 groups changed their lay-off policies as a result of their diversity work.

Six of eight grantees from the 2002 funding round had made progress in changing their hiring practices (all of the grantees reporting from previous rounds reported progress in this area).

- Board Development: 11 of 16 groups reported some level of change in their board development practices. Ten of those 11 cited recruitment as an area of practice that had changed; 9 of 11 changed their board member selection practices. Orientation practice changed for 3 groups. One group mentioned that how they select officers for the board had changed and another stated that their methodology for selecting committee chairs had changed as a result of the diversity work.

Even the newest grantees from 2002 (5 of 7) had made progress in the area of changing board development practice. Six of eight of the grantees from previous funding cycles had made progress in changing their board development practices.

- An area that divides between former grantees and the newest (2002) grantees is change in personnel policies. Nearly all the *former grantees (6 of 8) had changed their personnel policies as a result of diversity work*, whereas three of the 2002 grantees had made progress in this area. One group from 2002 had changed its “Organizational Policies.” In this organization the board passed a policy on diversity and cultural competence for the organization as a whole versus a particular change in personnel policies.
- The other area of prominent change in practice was in outreach and educational practices with 10 of 16 noting there was a change – including *materials that reflect diversity in message and to whom outreach is delivered and the languages in which materials were available*.

Other categories of change as listed in the survey: by-laws, volunteers, marketing, public relations, community advocacy, individual advocacy, fund development and *use of*

vendors had not changed significantly (less than 25% of organizations reporting a change in these areas).

While diversity work focuses deeply on “people practice,” it is interesting that practice around volunteers (advertising, recruitment, selection, orientation) was only checked by two groups.

In What Areas Was Diversity Increased?

The question was asked of groups whether or not it was a goal to increase certain areas such as the board, management, or line staff. They were then asked if diversity had increased or not.

<u>Area</u>	<u>It Was Goal To Increase</u>	<u>Diversity Increased</u>	
Board	13 groups	yes – 11	no – 2
Management	10 groups	yes – 6	no – 4
Line staff	10 groups	yes – 4	no – 6
<p>One group increased diversity among line staff although it was not a stated goal of their diversity work. Another group has seen an increased diversity in the applicant pool, but that has not translated into an increase in diversity of line staff at this time.</p>			
Volunteers	4 groups	yes – 2	no – 2
Clients	1 group	yes – 1	--
Constituents	1 group	yes – 1	--
Other	1 group (consultants)	yes – 1	--

Where groups identify a particular area to increase diversity, they make some progress. Progress was highest for increasing diversity among the board of directors and management. One group increased its board’s diversity by over 50%. Again, volunteers have not been a strong area of emphasis for change for these organizations in regards to diversity efforts.

**b). Longer-term outcomes: Institutionalization and Leveraging Effects
Decision-makers; Retention; Changes in Board and Management Composition**

Only those groups funded before the 2002 funding cycle were asked to respond to longer-term outcomes such as institutionalization and leveraging effects, however 3 of the 2002 grantees also responded making the total number of possible respondents 12.

Not surprising, less forward progress has been made on longer-term outcomes. In the logic model developed by the Evaluation Team longer-term outcomes were given a 3 to 7 year timeframe to emerge (See Exhibit One page 3A).

Decision-Makers

One of the key longer-term outcomes is an increase in the diversity of those who influence key decisions for the organization.

Fifty percent or 6 of 12 groups reported that diversity had been increased (or was in the process of being increased) among those who influence key decisions for the organization. Of these six groups one was a 1993 grantee and three were 1999 grantees. Two of the 2002 grantees reported that this change was happening within their organizations. Six of 12 groups reported that this change had not occurred, including 4 of the earlier grantees.

One earlier grantee wrote: “This continues to be our main challenge. We have very low turnover among senior managers – only three since 1990.”

Retention

When organizations were asked about retention of newer staff hired to create a more diverse organization – ten organizations responded to this question with a yes to being able to retain staff; one said no.

Interestingly, two groups picked both yes and no to this question. In each case, the survey was filled out by the Diversity Committee. One group wrote at length regarding the issue of retention:

“We have indicated both “yes” and “no” here to reflect the difficulty of answering this question. Looking strictly at the numbers/percentages of people of color in the organization, one might conclude that we have retained many of those that were hired since we began implementing our diversity initiative. However, one might also argue that if the actual individuals changed, we have not truly achieved retention. In addition, it is not clear what the motivation was for those who chose to leave ____.”

Another diversity committee responding to the survey with the executive director chose to disagree on this question. The executive director felt there had been retention, the diversity committee felt there had not.

Has the board composition changed to include non-majority representation?

Eleven groups responded. Five of 6 pre-2002 cohorts of grantees had seen a change in composition (with one reporting that their board had always been diverse). One earlier grantee had not seen a change.

Of the three 2002 grantees who responded to this question: one had not seen change; one group had already seen change in the board composition; and one could not respond as the team responding to the survey could not agree as to what “non-majority” meant for their organization (which harkens back the fact that many groups have not defined what diversity means in their organization).

Has management composition changed to include non-majority representation?

Of the eight groups in the pre-2002 grantee cohort, only 4 or 50% had seen management composition change. Four had not changed.

Three responded from the 2002 cohort of grantees – two had not seen change, one had.

External Relationships – or the broader “ripple effect” of diversity work

Clearly the effect of diversity work on external relationships takes time. Of the eight groups in the pre-2002 cohort of grantees, there was a degree of difficulty responding to the set of questions relating to external relationships.

When asked if diversity work has affected external relationships (with constituents, policy-makers, legislators, foundations, donors, markets) – only half or 4 of the eight pre-2002 grantee cohort responded yes. One group cited that “clients are now treated differently (positively).” Another group responded that diversity work within its organization leveraged collaborative work with a local school to address diversity issues and another said that it is viewed locally as a leader on issues of diversity.

Five of the eight pre-2002 grantee cohorts and one of the 2002 grantees identified external areas that had been changed as a result of their diversity work:

4 of 5 cited an increase in constituent support

2 of 5 cited improved relationships with funders as a result of their diversity work

1 group reported that respect from policy makers in their field had increased

1 group cited its own area of leveraging effect – and that most critically was described as the diversity efforts yielding “much better services to clients”

Influencing Factors

Groups were asked a series of questions regarding factors that might influence their progress on diversity goals – such as budget cuts, turnover or self-defined influencing factors.

Budget Cuts

Given recent budget cuts in Massachusetts and the declining economy for the second half of the granting period primarily being studied (1999-2002), it is not surprising that more than half of the respondents (9 of 16) stated that budget cuts were effecting their ability to carry out the goals of diversity efforts. Three (3 of 16) added that lay-offs were effecting their ability to fully realize goals as they were set out.

One group wrote, *“The percentage of people of color in the organization has stayed relatively consistent since we began implementing our plans – however lay-offs over the last few years have been a central factor in causing a decline in morale among staff as it relates to our diversity initiative.”*

Staff Turn-Over

When asked if turnover had affected the organization’s ability to sustain diversity work:

Not applicable:	3 of 14
Yes, turnover is an influencing factor:	6 of 14
No, it is not an influencing factor:	5 of 14

Respondents had many comments in this area. Samplings of these are:

“Staff turnover (particularly those in leadership positions) over the last few years has significantly affected the momentum of our diversity initiative.”

“The Director of Diversity left for another job and the position has not been replaced. Training is on hold.”

“We have had turn over of diverse staff who have been offered more salary and benefits by larger health care institutions.”

“New people need to be oriented/brought up to speed on diversity work; this slows the process down.”

Other Influence Factors Named by Respondents:

“Board having difficulty narrowing/defining its focus.”

“Need outside money to address key issues that were identified in our assessment.”

“The desire to be more effective in our work.”

“A key factor has been the nature of our work which includes teaching children and young people...the value of diversity, different perspectives, etc.”

“A change in leadership.”

5. Barriers

The 2003 survey took the barriers that emerged in the 1996 evaluation and asked people to check all that applied now. There were barriers added to the list: budget cuts and lay-offs. Finally, groups were asked to rank the top three barriers in order to raise up those issues that the Diversity Initiative might be able to help on (the barriers were not ranked in the 1996 evaluation so ranking cannot be compared).

When ranked, the following three barriers were listed in the top three:

- Lack of resources
- Competing priorities
- Too little time

Recent national studies,¹¹ have pointed out that a lack of balanced resource allocation to nonprofits, with most funding going to special projects and little to the organization’s infrastructure, may be stretching some nonprofits to the breaking point. Or possibly, recent state budget cuts may be stretching the respondents’ organizations.

A similar question was asked – but respondents could check off all barriers rather than only rank 3 – the result hardly changed from the previous ranking question:

- Competing priorities 15 of 16
- Lack of resources 11 of 16
- Too little time 11 of 16
- Budget cuts and decreases 8 of 16 (this was a new barrier listed)

¹¹ Light C. Paul, *Pathways to Excellence* or Linnell, Deborah, “Evaluation of Capacity Building” point out that the lack of support for the general operating and infrastructure costs (capacity, development, capital, technology) of nonprofits is literally “starving” them and stretching the organizations to the breaking point.

in this survey alone)

And closely related to lack of resources or time:

- Burn-out 7 of 16
- Organizational complexity 7 of 16
- Staff and board turnover 6 of 16

All other barriers identified in 1995 received 5 or less checks as presenting as a barrier in 2003. Barriers ranking highly in 1995 such as lack of support of the board and/or lack of support of management, received only 2 votes each in 2003.

The fact that indicators such as the lack of resources rose to the top is probably an indication of larger stresses on these organizations regarding funding and meeting the needs of clients (staffing). The Diversity Initiative for the most part has existed in times of expansion and growth in the nonprofit sector, the next few years will show whether the pressure on resources adversely affects diversity work in organizations or whether these organizations can continue unimpeded.

That old barriers such as board support, management support, staff resistance did not raise up barriers this time could be attributed to two factors:

- a) the Diversity Initiative's sharing out of previous findings from evaluations so that groups can learn (and not make similar mistakes), and
- b) the strong application review process that ensures commitment from the top

Staff resistance *may* be less of a barrier because:

- a) Diversity Committees representative of the staff make-up are a requirement of funding – ensuring at least a stepping stone for buy-in from staff
- b) There is more of an emphasis on “diversity” and bridging across difference versus the use of oppression models to create organizational change
- c) Consultants’ keep improving practice and learning from earlier mistakes (“retreats from hell”) and so forth

6. Leveraging Effects and Sustainability

The Evaluation Team felt that when diversity was achieved among those who influence key decisions and honest dialogue could be sustained, then the tipping point for sustainability of diversity within the organization was likely met.¹²

¹² Cheryl Vines, Executive Director of The Family Center supported the Evaluation Team's supposition that communication is key to sustainability. Based on her experience over years of building diversity in The Family

Every respondent, except three, (13 of 16) stated that they have a plan for sustaining diversity work – with two saying they are working on such a plan.

One of the strongest areas of work or outcomes for the Diversity Initiative itself has been creating a baseline understanding in the groups that diversity work is an ongoing process – that it is serious, challenging, long-term work. The groups are taking this message seriously by saying they have or will have the following indicators in place to demonstrate they are sustaining diversity work:

- It is okay to continue to bring diversity issues to the table 15 of 16
- Diversity Committee continues 12 of 16
- Diversity is part of the strategic plan 12 of 16
- The organization continues to fund diversity work 10 of 16
- Communication leads to action 9 of 16
- Human resource practices are changed 8 of 16
- New staff are trained and oriented in issues related to diversity 7 of 16
- Decision-makers find ways to include non-dominant cultures in decisions 7 of 16
- Those in positions where key decisions are made represent diverse sectors 6 of 16

The path of sustainability follows the path of outcomes designed by the Evaluation Team to guide the evaluation – leading from being able to talk about diversity issues to changing practices to having decisions shaped by diverse groups. There are likely rich rewards awaiting those groups who persevere and find ways to sustain diversity work – despite the barriers to resources and time.

Center, she has found that having a common language from which to have honest dialogue was a key contributor to sustaining diversity within the organization.

IV. Case Studies – Lessons from the Field

The steering committee of the Diversity Initiative developed criteria for choosing those groups that were to be highlighted as case studies. Based on these criteria six current and past grantees were selected and agreed to be interviewed for case studies. Four of those case studies are presented here: 1999 grantees Codman Square Health Center and Community Action Agency of Somerville (also a 1990 grantee); 1995 grantee, The Family Center. These grantees, some of which have been doing diversity work for more than 10 years, have rich experiences and are important to share. United for a Fair Economy is a grantee from the 2002 funding cycle and shares a story about embarking on diversity work. All of their stories are full of courage and remind us of the challenges and rewards that change and new beginnings often offer.

Codman Square Health Center Beyond Diversity to Cultural Competence in the Delivery of Services

Codman Square Health Center (CSHC) is a diverse and multi-cultural organization – except in one area at the inception of the grant – that provides medical services. It was conceived by residents over 25 years ago to improve the neighborhood.

While quite culturally diverse at the level of line staff and management, CSHC knew that its doctors, nurse practitioners and other “provider” staff were not as diverse as other parts of the organization.

Still, management staff wanted to look at the organization as a whole and address all the gaps that were raised. First steps included hiring a consultant and developing a Diversity Committee – made up of people from different areas and levels of the organization.

The Diversity Committee was large enough and the organization is complex enough (finding concurrent times to meet is difficult) that to manage its own logistics, it broke into two subcommittees: one to examine internal activities to continue to build and improve a culture of inclusion; and another to develop an organization-wide assessment.

A survey was very carefully constructed using various focus groups to help form the questions. Focus groups included Haitian employees, gay/lesbian employees, and those of Caribbean descent, white women and black men. The gay/lesbian focus group was particularly interested in having questions in the survey that dealt with other staffs’ perceptions of them and any issues that might exist regarding the need to educate people on gay/lesbian/bi/transgender issues.

Surveys were returned directly to the consultant. The respondents directly reflected the staff demographics – meaning if the organization was 20% Haitian, 20% of the returned surveys were from Haitian staff. What emerged was surprising to the Diversity Committee. The staff as a whole was pleased with the level of diversity and the organization’s culture of inclusion. They were less pleased with broader organizational development issues:

- Staff development (career opportunity and growth)
- Communication
- Support for education
- Recognition

This split in the findings was similar across all the respondents. As a result the organization has focused in several areas:

1. Continuing the Culture of Inclusion

- a) Designed strategies to address the concerns regarding communication and recognition in the survey (The Diversity Committee took on part of this work and builds opportunities to meet, recreate and talk across difference at various levels);
- b) Designed activities for formal and informal learning about different cultures (celebrating Haitian Independence Day, for instance);
- c) Conducting exit interviews has become the norm with all employees to continue to test for “inclusion;”
- d) Developed a diverse employee recognition committee;
- e) Improved access for disabled populations;
- f) Made the organization more culturally competent for Spanish-speakers (signage, translated materials).

2. Diversifying Provider Staff

Even before the survey was sent out, it was widely understood that the provider staff was less diverse than other areas of the organization. The survey helped to clarify that only 20% of the healthcare providers were minorities while the client-base was 70% minorities. The organization took proactive steps to change several practices to make the provider group more reflective of the clients and community being served:

- a) Jobs are left open for longer periods of time. This began with one position. The Chief Operating Officer purposely searched for diversity in the head of the dental clinic. A black candidate emerged and was hired. He, himself, is an excellent recruiter and has quickly diversified the dental clinic – with dentists who represent different races, nationalities and language capacities.
- b) The practice of patience in hiring has paid off in Women’s Health – which has also become more diverse.
- c) A direct communication to Boston Medical Center regarding the need for a diverse pool of doctor applicants has resulted in a far broader pool of applicants. This is being reflected in growth in bi-lingual and more culturally diverse doctors.

3. Cultural-competence

The staff were generally satisfied with the “make-up” or diversity of the organization – the focus of CCHC’s work is on building healthcare related culturally competent practices. A team of staff from CSHS is currently being trained through a grant from Blue Cross Blue Shield on the specifics of what constitutes culturally competent health practices including:

- looking at one’s own identity
- learning how religion, country or region of origin can affect patients’ communication with doctors
- learning how understanding and *listening* for difference can help improve the delivery of health services

The staff attending are being trained as trainers – the next goal being to develop cultural competence training as ongoing practice at CSHC.

Success: CSHC identifies these drivers for success:

- Support from the very top (senior management) is essential.
- Sharing information and clearly communicating the process, findings and next steps through the organization is critical to keeping people on-board and lessening misunderstandings.
- Diversity needs “sustained” attention by becoming a part of the organizational fabric – by making it part of everyday language, policies and practice.
- Numbers are important – the way they are “cut” can tell different stories. From the outside if total numbers are reviewed for CSHC then the organization looks very diverse; but looking at the organization by function the group could see less diversity among providers.
- Build-in time to create bonds. These bonds will see groups through the hard times by helping the individuals who make up particular identity groups see others in a different light – and see them for what they might have in common.

Barriers: CSHC identifies these areas as potential barriers:

- Well-meaning liberals or “do-gooders” can pull the real work off track. These are people who do not see their own privilege, but think they know the “answers.” This plays out more as a class issue where a provider or manager may not feel the need (or lacks the awareness that it is important) to check-in with the actual clients or staff who live in the neighborhood on issues of inclusion or cultural competence. This lack of awareness can slow down or obfuscate real change.
- Knowing what you want from a consultant before engaging one.

Lessons Learned

- The Diversity Committee is key. Because it is made up of peers and colleagues of all staff it legitimizes the diversity work for all staff.
- Bonding and social time is critical to building a foundation of communication across difference.
- Don't think you know it all (as a manager) – listen to employees and to clients.
- Consultants are there to guide – it is your process.

Community Action Agency of Somerville: Where Community Changes Drive Organizational Change

Community Action Agency of Somerville (CAAS) is a community-action organization with 65 staff, 18 board members and over 220 Head Start volunteers. Its focus is working with low income Somerville residents to provide Head Start, advocacy for new immigrant populations, fuel assistance and family services. CAAS was a 1990 recipient and a 1999 recipient of a Diversity Initiative grant (one of two organizations that have received funding twice).

CAAS is an organization that entered into diversity work because its constituents and community was under-going a rapid transformation. It became clear very early on that if the organization wanted to stay in business and serve their constituents well, it was going to have to change. CAAS' goal then became to change the composition of the staff through attrition and expansion.

CAAS has laid the groundwork to make such change as healthy as possible – and struggled in the beginning through very difficult conversations around race, class and power.

In the beginning the work focused on creating opportunities to come together to talk about fears, feelings and what the change was doing to both individuals and the organization as a whole. While trainings and retreats were important, they only gave individuals bits and pieces of new insight or new information. Trainings had to be coupled with the broader institutionalization of conversation. Conversations among individuals often become collective learnings. These learnings are then translated into actions and actions into policies or institutionalized practice. These in turn cause the shifts in culture.

One of the biggest early shifts occurred when the organization stopped advertising “Spanish-speaking (or any other language they were seeking) *preferred* and began advertising directly for the language needed on staff. The pool of applicants from multi-linguists immediately improved.

Feedback received from multi-lingual/multi-cultural candidates regarding the advertising practice of “preferred” indicated that when they see this in an ad, they assume the organization is not really serious about hiring for language diversity, but simply appearing to be open. When these candidates see that a language other than English is the skill/requirement of the position, they know the organization is serious and will take the time to actually apply.

As with many organizations, as staff from diverse cultures were hired – people from those cultures began arriving for services. A manager from the Haitian community provided the cultural competence and safety Haitians were looking for and they began turning to CAAS for an array of needs.

As diverse cultures began being served at CAAS there was some discomfort from its 1970s/1980’s constituent base of working class whites. CAAS was a standard-bearer in the area, however, for creating and maintaining a culture of inclusion – in its words, actions and deeds most visible recently by:

- Hiring from among those who have used the organizations services;
- Re-negotiating union contracts to use diversity (affirmative action) as a screen before seniority in negotiating lay-offs;
- Taking a public and institutional lead on anti-racism work in Somerville;
- Challenging a ballot question on the status of immigrants;
- Taking a stand on the effect of welfare reform on immigrants – working in collaboration with other groups to bring white ethnic groups together with immigrant groups to seek fair and just reform;
- Building cultural competence – they may not have a staff person represented from every culture that walks through their doors – but the culture of the organization has shifted dramatically towards seeing and being open to difference – in an environment that continues to change rapidly.

CAAS reflects the constituents it serves – but remains on the never-ending journey of diversity work as it tries to address new challenges. A positive for the agency is that there is little turnover. This positive, however, has meant there has been little turnover in more than 10 years in management positions – so the goal of creating diversity through “attrition and expansion” has not been met at the management level. CAAS has also struggled to maintain diversity on its board of directors.

Managers said they realize that at some point they may have to step aside to make the organization truly multi-cultural and yet, even as CAAS struggles with this – new community dynamics and shifts are occurring in regards to the cost of housing and rent. Adult children of residents typically cannot afford to buy in Somerville as adults and rents are out-pacing the income of the newest immigrant arrivals. The challenge for CAAS will be to continue to reflect and advocate for Somerville’s low-income residents, while managing through

continuously changing community demographics and meeting its own goal of becoming a culturally diverse organization at all levels.

Success Factors For Diversity Work Over Time and Distance

- Support from leadership.
- Diversity needs to be an organizational priority.
- A point person (someone assigned within the organization to carry the work) is critical.
- Board involvement is critical.
- Consultant match is important (for community-based groups a top-down style or corporate style consultant may not be the right fit).
- Stability in staff – makes a difference – learning has more of a chance of being institutionalized.

Lessons

- Never forget in whose name the organization does business and the reason why it exists – the learning is in the people – let the community and constituents be your guide.
- The start may be painful. Pay attention to the first steps by creating opportunities for staff to feel safe as they negotiate their way to lessening their individual fear, and becoming more open to learning and change.
- People will resist change, so the more inclusive the change process is of their ideas and needs the less resistance there will be.
- Organizational shifts can be somewhat organic – try to name them as they are recognized so people can take pride in positive change.
- Build a culture of respect and love.
- Get outside the organization (go to external trainings or meetings) to bring new information and different perspectives to the work.
- Diversity work will ebb and flow – be patient with it and know it's a journey.

The Family Center – the Circle of Change

The Family Center is a Somerville based organization designed to provide family-based counseling and community outreach services to families who have been traditionally underserved. The Family Center has tackled its diversity issues very deeply from the inside-out and placed management squarely in the middle of the work.

Their story also begins over 10 years ago when several areas converged: clinicians were recognizing how white the organization was; the few staff of color (10%) at the time began talking about how they got hired and were brought into the organization; and Somerville's demographics were changing. At a staff meeting the issue of diversity was brought up, "Somerville is changing, our client-base is not, there are only a few staff of color, we are mostly a white, female, middle and upper middle class organization."

The organization, led by the Executive Director at that time, embarked on a journey that has wrought progress, hardship at times, but remarkable change that has only served to strengthen and keep vital the organization.

The beginning was not auspicious. There was a disastrous 2 day retreat (run internally) that polarized people and would have done more harm than good if the leadership had not recognized that "our arrogance got in the way" and decided to start again – but start differently with smaller conversations. It took 6 to 9 months but the organization made the work a key priority (devoting business time to meetings and activities) and:

- Started smaller group conversations
- Began formal cultural sharing
- Did informal training – for instance, identifying films to watch together and to discuss

After this first year, The Family Center began looking at its culture, policies and practices. A major leverage point for change became the management team where there were no people of color. Two people of color were promoted onto the team in 1992/1993.

One of these people is the current executive director and she speaks to a period of intense discomfort as she replaced her supervisor on the management team. Despite the discomfort, the organization's commitment to action not just talking, brought her opportunities that enabled her to grow in her position and want to remain with The Family Center. Overtime, this one step has leveraged many other positive benefits – retention of staff of color; the organization's first African-American executive director; a staff person who grew her capacity to train externally on the issue of diversity. *So while making a dramatic shift in 1993 may have been difficult individually and organizationally – the power of acting at levels within the organization that would make a difference has paid off ten years later.*

Class was a component (along with race) of these conversations – particularly around differential treatment and inequities (with some staff being able to take off to summer homes and nearly closing the agency down in August – and not understanding or seeing why this would affect those who could not afford to be away – or be on "break.") At one point, in the mid-1990s the organization took another dramatic step and demoted all the managers and moved to flattened teams under a three person management team.

While the self-managed teams were difficult (and were ended recently as too cumbersome a management model) they did send a message about the seriousness of the organization's intent

around creating an inclusive, fair organization where people were not treated differentially because of their race, educational, class or ethnic backgrounds.

A Diversity Committee existed throughout the 1990s and identified and worked on:

- Increasing staff of color (now approximately 50% of staff)
- Addressing issues of class
- Staying in-tune with changes in community demographics and building cultural competence to serve newly defined “underserved families.” For instance, the most recent effort has been to become culturally competent around the needs of gay/lesbian/bi/transgender families
- Create inclusive language at all levels that is not isolating (policies – for instance paying extra for insurance to ensure domestic partners are covered, outreach materials, systems for hiring, choosing vendors)
- Revisiting and revising personnel policies on an annual basis to ensure that any areas of inequity are addressed and that there is “as much respect for the receptionist as there is for the executive director”

The Diversity Initiative grant in 1995 specifically helped the organization pay for a:

- Survey and climate study
- A new and improved staff retreat
- Review and change of policies
- New evaluation practice that calls for client feedback
- Development of a common language – that became the backbone of organic shifts in the organization around diversity. When a particularly painful conversation emerged between staff of color and white staff regarding the O.J. Simpson verdict – the organization had developed the language to work through the challenges of the conversation – and to dialogue about the implications of their different reactions to the trial and to learn from each other. ***The shift in organization was critical in that it no longer was about the people of color educating the white people – but a real conversation where people were working to hear each other and to learn and become more open based on the richness of their dialogue.***

The ability to raise up questions in skilled dialogue is critical to constantly challenging the comfort zone. A board may feel comfortably diverse because it has black and white board members – but that has become the new comfort zone. Are other people in our community represented? What differences are we choosing to not engage in because it is challenging or we might be challenged?

The challenge for The Family Center as it nears 15 years of working on issues of diversity is to ensure the work/history is not held by the Executive Director and that the culture of inclusion is “diversified” and sustained. There has been a challenge with growth and new staff – where the original bonding language that enabled staff to have difficult conversations

in the mid-1990s is not being translated well-enough. The executive director worries about the work not taking deep enough roots and feels it is time to re-visit diversity work formally.

Lessons:

- Mission should drive diversity work (and make the business case for the work). Those human service agencies that refuse to change with their changing communities will lose their client-base as families turn to more culturally competent organizations.
- Approach the work altruistically – as the right thing to do and from a strengths-based model.
- Influence management – build the case there. If you do not have the buy-in of the people who make the decisions, real change will not happen – it will be window-dressing – because the conversation has to be converted to policy for the work to get truly rooted in the organization.
- Identify the value added for the organization: staff will make better, more culturally competent decisions. There will be fewer “professional assumptions” and more questions – which will lead to improved services for end users.
- Understand “pacing” – too much too soon or too much talk without action steps can affect the overall success – allow people a comfort zone *and cause no harm* but keep pushing at the edges by challenging them to think and challenge themselves to make change – the small changes will lead to organizational change.

United for a Fair Economy

A piece of the problem is the solution: Americans Expect Fairness

United for a Fair Economy (UFE), is a national organization formed in 1995 with a mission to enlighten people about the growing economic divide in the US and to support the building of a broad popular movement for economic justice. It is important to understand for this case study that UFE does their work by creating popular education curricula and creative action and publications that demystify the economy. Meizhu Lui, who is Chinese American, has been the executive director for 2 years. The founder who is a white male still works in the organization. She begins her story by stating that she has always worked in positions pushing from below. As the leader, she has learned that personality makes a big difference in what you are able to get done. When she entered the organization there was already a “press” for diversity. The issue as she described it was that a classic white progressive group was in power and people of color felt marginalized, unheard and undervalued for their perspective. She goes on to say, “It really hit the fan when UFE started to hire more people of color. We found we could recruit people of color, but once recruited we had difficulty retaining them, we didn’t know how to live together. Even though the organization was committed to its mission, living it was quite another story.”

Meizhu tells the story of what she frames as a “white anti-racist” being more of a problem than a help. A white woman was the self-proclaimed champion for people of color in the organization. She would raise issues of class and race for them and use it as a way to accrue power to herself. She would talk about people feeling badly and that they were scared to come forward, but she would not say who, in the spirit of confidentiality. This exacerbated the problem. Meizhu wanted to get at the issue but couldn’t. UFE had a generic commitment to diversity, knew it was important but didn’t know how to get at it. She describes it as a “tricky thing.” They struggled with how to get issues on the table and talk about them. Further, as UFE explored their mission and the issue of who had power, they struggled with how to take power from one group to give to another. “Our progressive white people now feel they don’t have power, and are nervous about saying it out loud and people of color still feel they don’t have power. Where do you go with this? This is new territory and we are committed to finding out.” She recalls a debate in staff where they realized, “We can’t win this one alone. We need each other.”

With the grant UFE has embarked on a strategic planning process that has diversity integrated throughout the plan. Central to the planning process for them is their willingness to understand and challenge themselves and others on issues. UFE believes that central to their plan is their ability to settle some of the following questions which came from the bottom up in the staff:

- People of color want to know, why are we here. Is it because we are a part of the mission or do we have a real and important role to play?
- What is the role of the wealthy here? What is the role of low-income people here? How do we bring them together? Can we bring them together?

UFE plans to examine some of these questions in the assessment currently (spring 2003) underway. The board, staff, funders and external shareholders will all be interviewed. Meizhu believes that central to this work is to clearly define the mission. She believes UFE will use the survey to see how people inside and outside the organization view the organization. The organization has made a commitment to do whatever work emerges from what they plan with a consultant. Because UFE’s mission addresses fairness within our economic system a question their diversity work will address is the historical problem of “how do we bridge the class divide by giving people leadership roles to share power?”

Starting diversity work can be difficult. Meizhu gave an example of putting a person of color in a key role in the strategic planning process. This person quit because she felt unheard and marginalized, when in fact there was just too much to do. This person felt marginalized when there was no intent or evidence to support what she felt. Meizhu said sometimes our own internalized oppression hurts us and we have to deal with that too. She told another story that emphasized how important it is to bridge the divide. The “progressive whites” designed an education program without the input of low-income people in the organization that missed the mark. After realizing the mistake of lack of inclusion, they slowed the process down to learn from their co-workers. The materials were modified and the workshop was designed using the talents of all groups.

The barriers Meizhu cites are resistance to change and being afraid; worry that too many changes will cause the organization to lose ground; the pain people feel as they confront their own personal issues; an unwillingness of some to take personality out of the picture. Negativity can be a barrier and Meizhu feels eventually negative people simply need to be replaced. All these barriers when doing diversity work touches everything. Policies, salaries, work relationships. To overcome barriers the organization's people (staff and board) have to do individual personal work, and the organization must look at its systems and historical silos supported by race, class and gender and make the changes necessary to support positive change.

The lessons learned so far have been hard won. UFE had to open up space and give people time to vent and be clear that it was safe to do. The organization needed to reinforce publicly that speaking truthfully would not affect their job. Staff had to push deeper and ask themselves: "What are we really all about? Why do we need diversity?"

Healing is a critical part of the process. The work is about exposing pain and being able to give time for healing. Meizhu said, "We have learned that the best healing is working on a problem together...When our feelings are there bare and exposed we are vulnerable to one another. This connects us and helps us heal. There must also be and needs to be, an element of forgiveness. It is the only way to get below the conflict, quietly and with reverence."

Success Drivers

- Being a part of the strategic planning process.
- Doing a survey that delivers facts and creates learning.
- Creating a safe space to speak your truth.
- Hiring a consultant that fits the culture of the organization.
- Organization's commitment to living the mission and holding themselves accountable for behaviors policies and practices.

Barriers

- Resistance and fear of change.
- Negative people staying too long, resenting the effort.
- An unwillingness to look at your own personal issues.
- Good intentions gone unexamined and unacknowledged.

Lessons Learned

- When things don't work be willing to step back, be reflective and learn.
- Do something together to build a common bond.
- Be true to the mission and live it.
- Give time to healing when you expose pain.
- Be prepared for disappointments.

- Must be willing to dig deep and ask the tough personal questions to challenge your own beliefs and the beliefs of the organization.
- Must be willing to expose silos that separate and divide based on race, gender, and class. They must be truthfully acknowledged and addressed.
- Being vulnerable brings people together and helps us heal.

V. Telephone Interviews – The Long Term Impact

As the survey focused on newer grantees, the evaluators chose grantees from pre-1995 and conducted a simple telephone survey.¹³

The seven groups interviewed included Aids Action Committee, Big Sister Association, Boston Children’s Services, Chelsea Multicultural Initiative, Federated Dorchester Neighborhood Houses, Fenway Community Health Center and Museum of Science. The responses are aggregated here as with the surveys for reasons of confidentiality.

What was the focus of your organization’s diversity work?

- Organizational change and cultural competence. (2 groups)
- Three prong: educate the organization to work with the community; how to work with volunteers around cultural competence; begin to work with matches in an efficient manner inclusive of diversity; begin to work with volunteers in an efficient manner inclusive of diversity.
- Recruitment and retention of diversified staff.
- Staff tolerance, diversity awareness.
- Commitment to diversity; representation of diverse groups; quality customer service and understanding and appreciation of diversity; linkage with under-represented groups and communities; modify and develop programs and services to address issues of diversity; marketing to inform targeted audiences.
- To have our member organizations involved with diversity awareness.

Did the work end with the grant or did it continue?

- Ongoing – however there is always work to be done, “Are you going to being giving us more money?”
- No funding to continue work.
- The work is ongoing. (3 groups)
- Yes, ongoing with five (5) current Diversity Committees.

¹³ The evaluators wish to thank DI staffer Dakarai Rashada for his assistance with the telephone interviews.

- Continued for an eight (8) year process including grant award years (this group received two awards about a decade apart – which means they sustained the work in-between the funding).

How successful was the organization’s diversity initiative?

- Very successful – improved employee relations, reinforced staff and community investment.
- Awesome.
- It has changed the way we do business significantly.
- Reasonably, providing that ___ was already culturally sensitive.
- Good but there is always room for improvement.
- Very successful – staff investment and appreciation has grown.
- Moderately successful.

Name one significant barrier to change or a change that occurred?

- Abolishing myths and stereotypes through active engagement.
- Diverse staff, but board has regressed.
- How to significantly approach the diversity work design for adequate implementation.
- Slow process.
- Time scheduling and staff turnover.
- Multicultural awareness grew.
- Too difficult to name only thing, so I will address three areas:
 1. Exhibits are designed differently, not only using community focus groups to test modules but also content is designed to attract a broader audience.
 2. Sourcing, hiring and placement of staff has changed to reflect the diversity of guests who visit.
 3. Community partnerships have become an important resource for the organization and considerable time and effort has been expended building and nurturing these linkages.

What evidence exists to support your success?

- Interpersonal relations – staff recruitment and retention.
- Six (6) comprehensive diversity sensitive organizations.
- Diversity friendly work policy and orientation training inclusive of diversity.
- Changes in recruitment approach and policy.
- Goals accomplished, culturally competent staff, diversified staff.

- Enhanced perspective and practice of cultural competence and diversified staff.
- A lot of evidence supports our successes, but the work is ongoing and there is always more to do.

Analysis and Synthesis of Telephone Interviews

While not a large sampling, the diverse groups (museums, community-based, healthcare, service organizations) responses parallel the experience of those organizations who responded to the written survey.

First and foremost, as with the surveyed organizations and case studies, 6 out of 7 of the former grantees have **sustained** their diversity work. **The initial grant served as a catalyst to move the organization forward on the often difficult first steps of diversity work – the majority have continued with this work.**

The majority of the organizations perceive that their diversity work has been successful and this is evidenced through:

- Creating linkages – which is a longer term “leveraging” or ripple outcome the evaluation team hoped to see in former grantees
- Changes in policy – recruitment, hiring, orientation
- Increased diversity on staff
- Increased multi-cultural competence of staff.

This feedback speaks to the importance of the Diversity Initiative as an initial or seed funder of a process, that once started, most groups become committed to and continue by minimally continuing to invest staff time. The seed planted by the modest Diversity Initiative grants has allowed these groups to both change and also grow deeper “organizational” roots. Diversity is a capacity within the nonprofit organization – but doing diversity work builds capacity both vertically and horizontally within and without organizations. This is a critical message for the Diversity Initiative to expound upon and share with consultants, funders and grantees.

Finally, as one Steering Committee-Evaluation Team member said, ***“Diversity work is really hitting its stride when the work of the organization extends to the community and its constituents.” The message works both ways. Changing demographics or groups of underrepresented or those who have lacked voice in our organizations – influences us to change. The changed organization then stands as a beacon within communities illuminating both the path and the potential that the work of embracing diversity can bring.***

Diversity Initiative					
1. What is the Theory of Change?					
2. What are the Assumptions					
3. Logic Models for your component					
Inputs	Strategies	Outputs	Short-term Outcomes - 1 year	Mid-Term Outcomes 2-3 years	Longer Term Outcomes 3-7 years
<ul style="list-style-type: none"> Raising Funds Administrative Infrastructure Steering committee oversight and continuous learning Consultant pool Evaluation Publications 	<ul style="list-style-type: none"> Financial resourcing of approximately 10 to 15 organizations @ about \$10,000 every 24 months Technical assistance: to grantees peer/group TA general TA Supporting the use of consultants and the consultant selection process Capturing lessons learned from practitioners Sharing of lessons with broader audience 	<ul style="list-style-type: none"> Grants to nonprofit organizations Technical assistance to grantees (A) diversity planning (B) electing and working with Consultants Dissemination of learnings through evaluations, articles and conferences. Maintaining a peer network for learning and support 	<ul style="list-style-type: none"> Increased level of understanding of diversity Definition is widely understood at all levels of organization Increased knowledge of the issues and challenges towards achieving diversity Increased commitment to working to address issues and challenges Organization has increased knowledge and skills to actualize diversity goals <p>Sample Indicators that above has occurred (not inclusive):</p> <p>Training occurred, people in different areas of organization can define diversity, multi-level committee in place, assessment exists, plan of action exists, consultant in place, plan is divided into achievable steps</p>	<ul style="list-style-type: none"> Increase in diversity among board and staff or other defined areas of the organization (e.g. volunteer or clients) Incremental adoption of policies and practices Incremental change and ongoing refinements in practice Continuous learning and practice implemented across organizational functions and across peer network <p>Sample Indicators that above has occurred (not inclusive):</p> <p>Actual composition of staff, board, volunteers more diverse as defined by organization; policies reflect meeting diversity goals; human resource and board development practice has changed (policy and practice); organization supports active communication on issue of diversity.</p>	<ul style="list-style-type: none"> Culture of inclusiveness created Diversity among those who influence key decisions for the organization <p>(Tipping point of sustainability for diversity within organizations)</p> <ul style="list-style-type: none"> Honest dialogue (internally and externally) becomes the norm Sustained diversity—inclusion and shared power <p>Sample Indicators that above has occurred (not inclusive):</p> <p>Diversity is present; less turn-over; applicant pools are deeper/broader; language capacity increases; board composition changes, policies are acted upon, mechanisms for decision-making more inclusive; diversity present in positions of power.</p>

5. Where did the idea for working on the issue of diversity originate? (Check all that apply).

- Executive Director
- Fund development/public relations staff
- Management
- Line staff
- Board of Directors
- Clients/consumers
- Community constituents
- Funder (private or contractual funding)
- Other, Please explain _____

Any comments on where and how the organization developed the impetus for working on diversity? For instance, did a particular issue arise that the organization felt needed to be addressed?

6. What are the most important reasons the organization chose to work on the issue of diversity? (Please check all that apply)

- A shift in the demographics the people using our organization
- An issue was raised by people outside of the organization
- An issue was raised within the organization by staff
- A demographic shift in the community in which our organization is seated
- Diversity work can enhance the organization's overall effectiveness
- There is a strong champion for diversity work within the organization
- Funding requirements
- Other _____
- Other _____
- Other _____

7. What are the top 3 reasons diversity activities take place in your organization? (Please rank each item in the list below 1 to 3 – with 1 being the most important reason)

- For funding reasons**
- Issues arose that needed to be addressed**
- Commitment of the board of directors**
- Commitment of the executive director**
- Commitment of line staff**
- Continued presence of a diversity committee that keeps the organization on task**
- Continued presence of a consultant who keeps organization on task**
- Strategic plan (diversity is a stated goal of the organization)**
- Constituent expectations**
- Other** _____
- Other** _____

8. Which individual, group or entity is the key driver of the diversity work within the organization (Check only one)

- Consultant
- Diversity Committee
- Executive Director
- Fund development/public relations staff
- Management
- Diversity position
- Line staff
- Board of Directors
- Clients/consumers
- Community constituents
- Funder (private or contractual funding)
- Other – please explain: _____

Any comments on who/what group drives working on diversity within your organization:

Working with the Diversity Initiative:

9. Before receiving a grant from the Diversity Initiative did your organization request or use technical assistance from Diversity Initiative staff?

- Yes No

10. Before receiving a grant from the Diversity Initiative, did your organization use the resources at the Community Change, Inc. library?

- Yes No

11. Was the technical support from the Diversity Initiative staff adequate during the grant *application* process?

- Yes
- No
- Not applicable, we did not require technical assistance
- Other _____

12. Was the technical assistance from the Diversity Initiative staff adequate during the *grant period*?

- Yes
- No
- Not applicable, we did not require technical assistance
- Other _____

13. The grant we received from the Diversity Initiative was adequately funded:

- Yes
- No – if no, what amount would have been more helpful and why?

What Your Organization Did With The Funding:

14. After receiving a grant from the Diversity Initiative did your organization do the following? (Check all that apply):

- Identified a point person to coordinate internal diversity work we were funded to do
- Created a diversity committee
- Conducted a needs assessment
- Developed a definition of diversity for the organization
- Developed a “theory of change” regarding diversity
- Hired a consultant to assist us in moving our diversity work forward
- If so, who is/was consultant

- Held internal trainings on the issue of diversity
 - If so, please check all that attended any training: paid staff managers
 - Executive Director Volunteers Board Members others
- Attended external trainings
- Created an organizational plan for diversity
- Began implementation of the plan
 - by end of first year of grant by end of year two
- Completed implementing the plan _____ months after first receiving the Diversity Initiative grant
- Ended diversity work with completion of plan
- Ended diversity work at the completion of the grant
- Created a plan for sustaining diversity work beyond the grant period.
- Other _____
- Other _____

Outcomes (Shifts in Attitude; Gains in Knowledge and Skills)

15. Does the organization have a process to bring diversity issues out into the open?

- yes
- sometimes
- no

If no or sometimes, what are the barriers you can identify?

16. When issues are brought forward is there:

- Open discussion
- Action take
- Nothing done
- Other _____

17. If there is a dominant culture within your organization has there been a shift in attitude within that culture toward diversity work?

- No, there has not been a shift
- Yes, there has been a shift in attitude most evidenced (check all that apply) in:
 - Behavior (how people act)
 - Conversation (how people talk)
 - Practices (how the organization functions)

18. The shift in attitude is most visible (check all that apply):

- At all levels of the organization
- Diversity committee
- Line staff
- Management
- Executive Director
- Board of Directors
- Consumers/clients
- Volunteers
- Other _____

19. Has knowledge been gained in how to create a more diverse organization?

___yes ___no

20. The knowledge is visible among the following groups (check all that apply):

___At all levels of the organization

___Diversity committee

___Line staff

___Management

___Executive Director

___Board of Directors

___Volunteers

___Consumers/clients

___Other_____

21. Check all that apply in response to the following statements:

a) Through diversity work, the organization has learned how to:

___ define diversity

___ assess the need

___ bring issues to the table

___ choose a consultant for diversity work

___ identify that there is a good match with the consultant

___ have dialogue on the issue of diversity

___ have dialogue translate into action

___ create a plan of action that addresses the gaps in diversity

___ act upon a plan that addresses gaps in diversity

___ identify organizational outcomes that could result from not working on diversity

b) Through diversity work, the organization has learned that

___ diversity work takes time

___ there will be barriers in creating a diverse organization

___ the barriers were worth working through

___ healthy tension can move the group forward

___ policy change was needed

___ the organization had to re-consider who should be involved in decision-making

___ Other learnings:

Any comments on learnings listed above or those not checked?

22. Has any policy/practice or part of a policy/practice changed as a result of diversity work within your organization? (Check all that apply).

- By-laws
- Personnel policies
- Service delivery practice. If so, please explain _____

- Board Development practice: recruitment selection orientation
- committee chair selection
- board officer selection

- Hiring practices: advertisement hiring process who selects
- orientation training supervision/evaluation
- lay-off policy

- Volunteer practices: advertisement/public service announcement
- selection process orientation training supervision
- incentive programs

- Marketing practices
- Public relations practice
- Outreach/education practices
- Advocacy (community/policy/ level)
- Advocacy (per individual client)
- Fund development
- Use of vendors

If any of the above are checked, please give one or two examples of how a policy or practice changed as a result of the organization's work on diversity:

23. Was there an increase in diversity among any of the following groups within 9 to 24 months after receiving the grant?

It was a goal to increase

Diversity Increased % Increase

diversity as we define it within this group:

Where possible

Board of Directors	___yes ___no	___yes___no___na	_____
Management	___yes ___no	___yes___no___na	_____
Line staff	___yes ___no	___yes___no___na	_____
Volunteers	___yes___no	___yes___no___na	_____
Clients/Consumers	___yes___no	___yes___no___na	_____
Constituents	___yes___no	___yes___no___na	_____
Other	___yes___no	___yes___no___na	_____

Influencing Factors

24. Have recent cuts in state, federal contracts and private funding decreased the organization's:

___ ability to fully carry out the goals of diversity efforts?

___ diversity due to lay-offs?

___ no applicable

25. If the organization has recently developed a lay-off plan was diversity factored in?

___ Yes

___ No

___ Not applicable, we do not have a lay-off plan

26. Has turn-over effected your ability to sustain the diversity work?

_____ not applicable

_____ yes: please explain _____

_____ no: please explain _____

27. Has any other factor influenced the organization to meet its diversity goals?

_____ No

_____ Yes, if so what are the factor(s)? _____

Barriers

28. In the 1996, the evaluation identified a number of barriers to moving forward on diversity – these are listed below.

a. We are interested in knowing if these barriers remain the same or have changed:
(Select all that apply)

- Lack of ongoing support by board
- Lack of ongoing support by top management
- Lack of resources
- Competing priorities
- Staff resistance
- Staff and board turn-over
- Burnout of people spearheading diversity efforts
- Poorly planned diversity training

List continues onto next page

Question 28 Continued

- Poor fit of consultant to organization
- Too little time, too much to do
- Poor communication
- Organizational complexity
- Too narrow a definition of diversity as defined by some participating organizations , such as excluding sexual orientation and other forms of diversity from the definition, which can lead to resistance/opposition by excluded groups
- Differences in language and culture
- Unions (where joint management/line staff teams are discouraged)
- Divisiveness as a result of using the concept of oppression, isms, or power in diversity work
- Organizational inertia and resistant to change, particularly for organization with histories and self-perception of high accomplishment and excellence
- Budget cuts/decreased funding created staffing or increased focus on fundraising and decreased focused on projects like our diversity efforts
- Lay-offs due to budget cuts decreased agency diversity

Please add any barriers that your group encountered not listed above:

- Other _____
- Other _____

b. Of those barriers you checked above, please rank the top 3 barriers here:

1. _____
2. _____
3. _____

2002 Grant Recipients Please Skip to Question 36; All Others, Please Answer 29 –35.

Longer-term Outcomes and Institutionalization of Diversity Work

29. Did diversity work undertaken by your organization increase diversity among key decision makers in the organization?

yes no

If yes, what positions _____

30. Has there been retention of those staff hired to create a more diverse organization?

yes no

31. Has the board composition changed to include non-majority representation?

yes no

32. Has management composition changed to include non-majority representation?

yes no

33. Has diversity work effected external relationships (with constituents, policy-makers, legislators, foundations, donors, markets et cetera) for the organization?

yes no

If yes, which external relationships have been effected and how _____

34. Has change in external relationships been positive negative

35. Has any effect on external relationships leveraged any other change in the organization? Please check all that apply:

- Increase funding
- Decreased funding
- Constituent support/trust increased
- Constituent support/trust decreased
- Policy-makers in our field respect us more
- Policy-makers in our field respect us less
- Other leveraging effects

Sustainability

36. Does the organization have a plan for sustaining diversity efforts beyond funding period?

yes no

37. How do you know that the diversity efforts are being sustained? (Check all that apply):

- Diversity Committee continues indefinitely into the future
- It continues to be okay to bring diversity issues forward
- Communication leads to action
- New staff are oriented and trained (when needed) in organizational culture of constructive communication about diversity
- Policy changes are reflected in organizational practice at all levels
- Human resource practice ensures orientation of all new staff to policies/practices related to diversity
- Diversity issues are part of organizational strategic plans
- Those in positions where key decisions are made represent diverse sectors
- Those in positions of power who are of the dominant culture create ways for non-dominant cultures to have role/voice in key decisions
- Organization dedicates core funds to ongoing diversity work
- Other indicators of sustainability of diversity efforts: _____

38. Any other comments you wish to share (please use back of page):

THANK YOU!

Appendix B: List of Survey Respondents

The evaluation team wishes to thank all of the following organizations (and staff who are not listed) for their participation in filling out the surveys. The Steering Committee of The Diversity Initiative will be thanking these organizations for their time, consideration and participation.

Associated Early Care & Education
Boston Alliance of Gay, Lesbian & Transgender Youth
The Brookline Center
Center for Collaborative Education
Child Care Resource Center, Inc.
 Community Action Agency of Somerville
 Educators for Social Responsibility
Environmental Leadership Program
Families First Parenting Programs
The Home for Little Wanderers
Mass NARAL
The May Institute
Massachusetts Legal Assistance Corporation Diversity Coalition
The Museum of Fine Arts
 Pine Street Inn
South End Community Health Center
Thompson Island Outward Bound Education Center
 United for a Fair Economy
Women's Institute for Housing and Economic Development

Appendix C: List of Evaluation Team Members

The evaluation team appreciates the hard work of the evaluation team members who helped shape critical questions, develop the theory of change and logic model to guide the evaluation, reviewed the survey and provided feedback on the draft of the evaluation. Evaluation team members included:

Pam Jones, Local Initiative Support Center
Dale Patterson, Community Action Agency Somerville
Carol Reinhart, Community Change
Klare Shaw, The Barr Foundation
Jonathan Spack, Third Sector New England

Appendix D: Career Briefs for the Evaluation Team

Deborah Linnell, principal researcher and writer, has conducted multiple evaluations for philanthropic institutions and nonprofit organizations since 1990. Four of these evaluations focused specifically on capacity building efforts by nonprofits or capacity building organizations serving the sector. Besides evaluation, Linnell has conducted organizational assessments and provided organizational development consulting to nonprofit coalitions, associations and collaboratives, as well as worked for over 22 years as a planner, strategist, fundraiser, board member and executive director within the sector. She is the lead author of the *Executive Directors Guide: The Guide for Successful Nonprofit Management* published by Third Sector New England.

Erlin Belton is the CEO and founder of The Lyceum Group. The Lyceum Group is an organizational and individual development consulting firm. Its mission is to influence societal and workplace rethinking and dialogue to influence change strategies that are thoughtful, impactful and make common sense to those who have to implement them. Ms. Belton's approach to executive coaching is to create coaching interventions that consider each individual with deliberate intention while balancing vulnerability and power as they use their content expertise as managers or leaders. Currently, Ms. Belton is working with senior executives, leadership teams, boards in corporate, public, and nonprofit sectors. She has extensive experience developing workshops and individual consultations in conflict resolution, team and relationship building, and communications skills with an emphasis on giving and receiving feedback. Her current interest is in the area of creating individual and organizational legacies and exploring their relationship to building value-based corporate systems. She has held multiple teaching appointments at Tufts University, Harvard University and the University of Massachusetts.