



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 an executive summary 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

Nonprofit Effectiveness – Inclusiveness Matters The Case for Dialogues that Reach Across Difference

Executive Summary

This is an evaluation report of the Diversity Initiative illustrating effective practices and lessons from the field.

The full report of the Diversity Initiative's 2003 evaluation was prepared by Deborah Linnell, of Linnell & Associates and Erline Belton, of The Lyceum Group. The report in its entirety is available at www.tsne.org.

Introduction

The Diversity Initiative, a program of Third Sector New England, is a regional collaborative of funders and practitioners which provides management and financial assistance to nonprofit organizations and communities of practice dedicated to maximizing their effectiveness, cultural inclusion and internal diversity.

The Diversity Initiative (DI) was created in 1990 as a result of a group of funders' efforts to specifically address recruitment and retention of staff of color. Over time it became apparent that issues of race are symptomatic of systemic issues relating to inclusiveness, access, and equal opportunity denied to people marginalized by cultural bias, attitudes and behavior based on race, gender, sexual orientation, class, age and ability.

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

Summary of Methodology

In the Spring of 2003 an evaluation of the Diversity Initiative was conducted and results were compared to a 1996 evaluation. The methodology was a mix of a participatory and outcome evaluation. Key stakeholders were involved in the majority of steps. Outcomes were developed via a logic model and these were then tested through several tools – written surveys of all current grantees and several grantees from the past; telephone survey to a selection of past grantees; a focus group with consultants; and six case studies.

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 and the accompanying logic model (see Attachment A) are integral tools to the evaluation as they raise assumptions about outcomes that were tested through the evaluation. The findings are summarized here.

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>

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.*

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 some this has led to the deeper outcomes of:

- An organizational language of inclusiveness¹ – that becomes organic and rooted with staff (not necessarily the board or constituents)
- 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)

¹ 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.

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.

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

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 than they were in the 1990s, now that Diversity Committees’ shoulder the work. Other drivers of success for those surveyed included a plan for diversity work; an initial assessment; and 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. This may be the result of a change in the Diversity Initiative’s requirement that a “Diversity Committee” comprised of a mix of line staff, management and board be created at the beginning of the process.

For consultants key drivers for success included:

- 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). 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 exhibit behaviors that indicate 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 a 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 if 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.
- ***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 changes in policy for the work to get truly rooted in the organization.

- Remember who the organization serves and the reason why it exists – the learning is in the people – let the community and constituents be a guide and a beacon.

Long Term Impact

The evaluators chose grantees from pre-1995 and conducted a simple telephone survey. While not a large sampling, the diverse groups (museums, community-based, healthcare, service organizations) responses parallel the experience of those organizations that responded to the mailed 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.**

Conclusion

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 under-represented groups 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.

The path of sustainability follows the path of outcomes as articulated in the theory of change that guided the evaluation. That path leads from being able to talk about diversity issues to changing practices to having decisions shaped by diverse groups. There are rich rewards awaiting those groups who persevere and find ways to sustain diversity work – despite the barriers to resources and time.

Case Studies

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 as well as 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 1970's/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 organization's 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 staff 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 guides.
- 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 become 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

- Creating 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.

Diversity Initiative Steering Committee

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