



Nonprofit Board Inclusion Series

RoadMap 1.0

October 2021

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Dear Board Chair and Chief Executive Officer:

Welcome to the Board Inclusion Roadmap! If you are perusing this tool kit, it probably means that you are engaged in an effort to bring more diverse representation to the board of directors of your nonprofit. Congratulations! We are with you.

This work requires leadership, commitment, and a partnership between the Board Chair and the Executive Director/CEO. A common vision is needed to develop, implement, and measure a successful diversity, equity, and inclusion plan that is also consistent with the organization's mission and goals. Central to supporting this is the identification, recruitment, onboarding, and support of diverse board members.

The Board Chair or President is critical to the success of any DEI initiative. Leadership sets the tone and helps identify priorities while reiterating the importance of the “Fundamental Duties of a Nonprofit Board Member,” as described by BoardSource:

- **Duty of Care** — Each board member has a legal responsibility to participate actively in making decisions on behalf of the organization and exercise their best judgment.
- **Duty of Loyalty** — Each board member must put the organization's interests before their personal and professional interests when acting on behalf of the organization in a decision-making capacity. The organization's needs come first.
- **Duty of Obedience** — Board members bear the legal responsibility of ensuring that the organization complies with the applicable federal, state, and local laws and adheres to its mission.

The organization's CEO/Executive Director must identify expertise, business processes, and best practices to support the organization's efforts with DEI. The CEO also serves as a critical connection to the organization's staff and volunteers for the implementation of many aspects of the DEI agenda.

This road map is intended to provide tools and resources to support your DEI journey. We encourage you to develop a strategy the involves your organization's full board and staff. The information included is here to assist you.

This work requires time and resources as well as a commitment toward personal growth. Individuals must be willing to engage in constructive dialogue about important issues such as systemic racism, implicit bias, the current lack of diversity, equity, and inclusion, and effective ways to address building a more inclusive organization. It is important to embrace DEI as a critical element of continued growth, viability, and credibility in the community. We encourage you to do the following:

- Continue educating yourself and the board regarding diversity, equity, and inclusion. What diversity do you currently have on the board beyond race and gender? What is the diversity of the staff? Get comfortable with this conversation. Ensure that everyone has access to the language of diversity and the approaches to creating a more inclusive organization.
- Acknowledge the power dynamic that exists in the current board structure. You may need to navigate structural changes and long-held practices that limit inclusion – often unintentionally. Assess what these are and develop a plan to address these imbalances and blind spots.
- Make space for new ideas and approaches to the way the Board does business. Are you effectively engaging the community you serve? How do you measure community engagement? What are the mutually beneficial aspects of your community partners beyond service delivery?

The benefits of greater board diversity include a strengthened organization, better positioned to serve the community. According to BoardSource, a diverse board “promotes creativity and innovation and yields differing voices that can play important roles in accomplishing the organization’s mission and increasing understanding of constituents and community needs. Diverse boards also are more likely to attract diverse donors, and grantmakers are increasingly focused on diversity.” In other words, it is a triple win for the organization, the people that are served, and the community at large.

We are in this together, and we are excited to be on this journey with you!

The Community Foundation for the Greater Capital Region

INCLUSION SERIES STEERING COMMITTEE MEMBERS

Marcia Coggnetta

Marcia leads the Office of Corporate Engagement for Goldman Sachs Ayco Personal Financial Management and is responsible for the development and execution of Ayco's corporate giving, philanthropic and community partnership strategies.

Previously, Marcia spent 10 years leading staffing, operations, and people development for Ayco Private Wealth Management. Prior to that, she held a variety of roles within Human Capital Management, focusing on benefits administration, employee relations and recruiting.

Marcia joined the firm in 1999 in the National Tax Group and was promoted to Vice President in 2018. She is the President of the Ayco Toastmasters Club and serves on the Board of Directors for two organizations: United Way of the Greater Capital Region and the SUNY Plattsburgh Alumni Association.

Marcia earned a bachelor's degree in Psychology from the State University of New York at Plattsburgh.

Angela Dixon, MBA, SHRM-SCP

Angela Dixon serves as the Senior Vice President, Chief Diversity Officer for Berkshire Bank. In this role she is responsible for driving the Company's Diversity, Equity, and Inclusion (DEI) strategy in collaboration with executive management and each of Berkshire's business lines. Angela has more than 30 years of executive experience working with public and private sector organizations on a range of workforce and strategic management issues including strategic planning, leadership development and DEI.

In 2019, Angela established Dixon Consulting II, LLC, a management consulting firm, focused on DEI and Talent Management. Dixon Consulting assists organizations in creating and cultivating DEI initiatives that align with business strategy, expand opportunities for diverse communities and produce sustainable, measurable impact. Ms. Dixon is a sought-after facilitator and collaborator on issues such as nonprofit leadership and board diversity as well as on issues impacting women of color and minority business development.

Prior to starting her consulting firm, Angela served as Vice President for Talent & Inclusion with the Capital Region Chamber of Commerce from 2018-2019 and Deputy Comptroller for Human Resources and Administration for the New York State Comptroller's Office from 2008-2018, in Albany, New York.

Angela has a BA in Political Science and MBA through the University at Albany, Albany, New York. She is also a Senior Certified Human Resources Professional through the Society for Human Resource Management (SHRM-SCP). In 2018, she was named to the U.S. Chamber of Commerce Foundation's inaugural Business Leads Fellowship Program – an initiative designed to strengthen the role of business leaders in education and workforce development.

John Eberle

John is the President & CEO of the Community Foundation for the Greater Capital Region whose mission is to strengthen the community through philanthropy. In keeping with that goal, the Foundation awarded over \$10.7 million in grants and scholarships in 2020. In addition to supporting dozens of grantmaking funds and programs, John helps lead and support multiple community service initiatives including the Capacity Building Program, the Capital Region Community Indicators project - <https://www.capitalregionindicators.org/> , Green & Healthy Homes Initiative: Greater Capital Region, the Upstate Alliance for the Creative Economy (ACE), and an equity funders initiative that is working to increase diversity, equity and inclusion on nonprofit boards in the Greater Capital Region. John is an active Board Member for Literacy New York and serves as a leadership mentor and organizational development consultant to various organizations in his community. More recently, in partnership with the United Way of the Greater Capital Region and partners, John convened and facilitated regional funders supporting the Capital Region Community COVID-19 Response Fund. To date the Fund has disbursed over \$1.1 million to local organizations serving individuals and families that have been disproportionately impacted by the pandemic.

Before arriving in the Capital Region in 2016, John served as the Vice President for Grants and Community Initiatives at the Central New York Community Foundation, where he managed active grantmaking programs and special projects supporting the region. In this role, John oversaw over \$2.5M in grant and special project distributions annually. John also served as an Officer of the Community Foundation, and Secretary for the CNY Philanthropy Center, LLC., which opened in the fall of 2010.

John is a Graduate of Syracuse University's Maxwell School of Citizenship and Public Affairs with a Master of Arts in Public Administration. His emphasis of study was nonprofit leadership and management. He also earned a certificate of advanced study in conflict resolution while at the Maxwell School. John received his Bachelor of Arts, magna cum laude, from Columbia International University. John is also a 2008 graduate of Leadership Greater Syracuse. Before joining the Community Foundation in 2006, John worked for 14 years with the Rescue Mission Alliance of Syracuse in multiple executive leadership positions—most recently as the Director of Program Development and Director of Regional Services. Born and raised in Upstate New York, John resides in the town of North Greenbush with his wife Pam. They enjoy many outdoor activities, travel to Mexico, and serving in their local church. Pam and John have four grown children and two grandchildren.

Jonathan Meagher-Zayas, MSW, MPA

Jonathan Meagher-Zayas is a Queer Latinx Millennial nonprofit strategist dedicated to addressing equity issues, building capacity, engaging the community, motivating new impact leaders, and getting stuff done. Jonathan wears many professional hats, including Director of Agency Advancement at Villa of Hope, Community Engagement Associate for the Community Foundation for the Greater Capital Region, Founder of the Emerging Nonprofit Leadership Accelerator, Leadership Development and Equity Trainer, Social Sector Career Coach, Association of Fundraising Professionals Volunteer Leader, and Immediate Past Board Chair of Mission Accomplished Transition Services.

A fundraiser for over ten years, Jonathan has raised over \$4 million through major gifts, corporate relations, special events, foundation and government grants, and annual giving initiatives. He has extensive experience managing leadership development programs and advancing diversity, inclusion, and equity initiatives. Jonathan also has expertise in community engagement and communications, including managing and enhancing social media, digital communications, newsletters, public relations, and marketing campaigns for various nonprofit organizations. Lastly, he has been a career counselor for many years, helping individuals interested in public service and nonprofit work with resumes, interviews, job search strategies, mentorship, and networking.

Jonathan has received several accolades, including 2021 Hispanic Executive NextGen Collective Inaugural 30 Under 30 Latinx Leaders, 2019 Association of Fundraising Professionals Global Outstanding Young Professional, and 2018 Association of Fundraising Professionals, NY, Hudson-Mohawk's Outstanding Young Professional.

Jonathan earned his Master of Social Work and Master of Public Administration degrees at the University at Albany, SUNY, and his bachelor's degree in Religion, Linguistics, and Gender Studies from the University of Rochester. He currently resides in Rochester, NY, with his husband and three adorable pets.

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ROADMAP USER GUIDE

This RoadMap is designed to provide general tools to support a nonprofit's journey toward greater diversity, equity, and inclusion within its Board of Directors. By supporting the organization's leadership, it is believed that governance will be enhanced, community connection and responsiveness increased, and the mission of the organization will be met with greater effectiveness and efficiency.

This is not a step-by-step guide but rather a document intended to meet you where you are along your journey. To meet this goal, you will find the following:

Background

A Letter to the Board Chair and CEO – highlighting the importance of this partnership
Background on the Initiative – Its importance to the Nonprofit Sector in the Capital Region, Board Self-Assessment, and 7 Steps to Increase Board Diversity.
In addition, we provided the 21 Day Equity Challenge Catalogue with educational resources.

Summary of Inclusion Series

This section provides an overview of the three-part workshop series held to provide context, education and build awareness necessary to support board inclusion. Topics highlighted included: DEI terminology, Change Management Strategies, Acknowledging and Mitigating Biases and Moving to Action.

Board Inclusion Series Roadmap

This section takes you through a series of visual graphs that address the various steps and building blocks toward a more diverse and inclusive board. These steps help to highlight best practices and proven approaches to making progress. Common experiences are also highlighted along the path including some potential roadblocks and restarts that may be necessary. These steps can be used to assess where you are and identify some future actions to take. Specific areas highlighted include: Board Assessment, Training & Education, Strategic Planning, Recruitment, Onboarding and Monitoring Progress. And don't forget to celebrate your successes – small and large – as you go! It will keep your team motivated.

Tools and Resources

In these two sections you will find information to facilitate board discussions on action plans, board pre-assessments, board composition, etc. There are also documents that address personal privilege, having difficult conversations and addressing microaggressions which impact diversity and inclusion. The last page identifies several online resources.

We hope that you will find this RoadMap helpful, and we wish you success as you embark upon or continue along this journey.

To navigate pages easily within this document, we recommend learning how to utilize Bookmarks function in your PDF software. [Click here how to use Bookmarks in Adobe.](#)

BACKGROUND

In 2018 and 2019, the Community Foundation for the Greater Capital Region (CFGCR) launched a partnership with the Institute for Nonprofit Leadership and Community Development at the University at Albany to [assess nonprofit board diversity and inclusion throughout the Greater Capital Region](#). The goal of the assessment was to understand current demographics, identify organizations with policies and procedures related to diversity, and evaluate attitudes around diversity. The report identified challenges nonprofits face when recruiting a diverse pool of candidates and recognized the obstacles community members of diverse communities encounter when serving on boards. From the initial assessment, the Community Foundation has continued to address board diversity through these three strategies:

1. **Qualify individuals from underrepresented identities.** Provide individuals who are passionate and willing to serve with educational training and resources to support their success.
2. **Match and connect with diverse communities.** Connect community members' skill sets with board opportunities at nonprofits serving our community.
3. **Create a welcoming space on boards.** Identify steps nonprofits can take to ensure they are inclusive, welcoming, and respectful of all identities and expertise.

This document will focus on the third area and is the culmination of the Foundation's commitment to supporting nonprofits in achieving greater board diversity by providing a roadmap with strategies and tools.

Following are a series of steps a nonprofit board can take to develop a plan of action.

Setting the Stage

To continue to support this dialogue among nonprofit leaders, CFGCR sponsored a three-part series that addressed issues such as change management, the language of diversity, equity, and inclusion, the importance of addressing the impact of bias, and the necessity to move from conversation to action. The series is available online: www.cfgcr.org/nonprofit-board-inclusion-training-series for individuals interested in viewing the workshops. Resource materials are also included.

That content has been instrumental in setting the stage for this RoadMap. Included herein are strategies, tools, and templates to support leadership efforts that foster greater board diversity, equity, and inclusion among the Capital Region's nonprofit community.

Nonprofits should strive to be representative of the populations they serve and the community in which they are located. Yet, across the nonprofit sector, this is often not the case for many.

The 2020 report, "[Nonprofit Board Diversity, A Snapshot of the Capital Region](#)," identified the following statistics:

Of the 107 boards surveyed that provided race/ethnicity data, the following was reported:

- *11.5% of board members were Black/African-American*
- *3.4% were Hispanic*
- *43% of the boards surveyed contained no Blacks/African-Americans*
- *80.4% of boards reported no Hispanic board members*

Regarding gender, 45.8% of nonprofit board members were men, and 53.7% were woman, 0.4% identified as non-binary, and no members identified as trans men or trans women.

The murder of George Floyd in 2020 at the hands of law enforcement fueled a racial and social reckoning across the country and further provided a sense of urgency in taking a comprehensive approach to addressing diversity, equity, and inclusion across all sectors – the nonprofit sector included. Although this RoadMap focuses on nonprofit board leadership, the effort is inclusive of nonprofit leaders, managers, and the workforce at large. To continue to thrive and grow, boards must take the lead and be the agents of change that the sector requires.

Research shows that diverse boards bring broader perspective, have deeper engagement with the community, and are more innovative in their service design and delivery. Diverse organizations are better able to respond to the everchanging needs of their constituents, communities, and stakeholders.

This RoadMap is designed to take the reader through steps toward achieving board diversity. Tools have been compiled and resources highlighted. It should be acknowledged that no two nonprofits are exactly alike. Each has different origins, histories, missions, and approaches to governance. There are varying levels of maturity and financial and programmatic expectations within and among board members. Organizations are guided by different leaders of varying styles, and each has unique regulatory requirements, policies, and practices; yet there are many similarities. This material may be used as a framework, tailored to meet the needs and timeframes of your organization. If greater board diversity is an organizational goal of yours, a few basic steps are suggested:

- **Conduct a Board Assessment** – Review the current composition of your board through a diversity lens. What perspectives and/or experiences are you missing?
- **Prioritize Areas to Address** – Outline your strategies, tactics and resources needed to achieve your goals.
- **Engage Your Community Partners** – Define a long-term strategy for enhanced and purposeful community engagement.
- **Implement** your plan and
- **Monitor** your progress, adjusting as necessary.

Now let's continue our journey...

Board Self-Assessment

The Nonprofit Governance Programs and Services website for “Get on Board” states that, “a strong, vibrant board of directors is a clear indicator of a healthy organization, yet even the best organizations need a periodic check-up to ensure they not only survive but thrive in today’s environment. A board self-assessment is the best place to start to check your board’s vital signs, or to put in place practices and strategies for a healthy and energized board.”¹

In addition to vital skills that must be present for an effective board, areas like financial management acumen, legal counsel, and program expertise, boards must seek out individuals with other skills and experiences that contribute to their organization’s effectiveness and impact in the communities they serve.

“Almost any recent compilation of board best practices will list board self-assessment as something today’s boards should commit to on a periodic, if not annual, basis. But why? There is little argument that the strongest organizations almost always have the strongest boards. Strength is not always defined as having a ‘who’s who’ board made-up of wealthy and influential individuals. The reality is that it is not so much who is on the board but how the board operates.”¹

The current climate dictates the need for nonprofit boards and organizations to embrace the importance of diverse and inclusive representation in leadership and board membership. The best boards ask the question, “How can we do this even better?” If, in response to that question, the board only looks at the staff and its programs, it is missing an essential element and the organizational component over which it has the most control. In the same way that the board might ask staff to develop objectives and measurements for programs for which they are responsible, the board should consider setting objectives for its own performance,² such as inclusivity, and the need to focus on racial equity, to innovate and reach marginalized and underrepresented communities. Board self-assessment is a logical component of this work and a great place to start. In addition to racial equity, we must also ensure that we are inclusive of other often marginalized communities including women, individuals with disabilities and members of the LGBTQIA+ community.

To receive the maximum value from the board self-assessment process, organizations must actively engage the board along the way. Todd Sears, former investment banker and CEO of Out

¹ Get on Board: Nonprofit Governance Programs +Services, [Is Your Board Ready for Self-Assessment](#).

² <https://www.fsg.org/blog/fsg-policylink-justcapital-launch-corporate-racial-equity-alliance-and-2021-ceo-blueprint-for-racial-equity>

Leadership, describes the advantage of investment in LGBTQIA+ inclusion as the “Return on Equality.” The openly LGBTQIA+ population is diverse and growing. Companies improve their bottom lines through LGBTQIA+ inclusion, as both LGBTQIA+ consumers and straight allies increasingly make purchasing decisions based on the company's commitment to equality and inclusivity. Additionally, as the LGBTQIA+ community is both visible and also intersectional by definition, forward-thinking companies that include LGBTQIA+ leaders in their board diversity plans and goals will also see an increased representation of women, people of color, and other minorities. Boards are increasingly deepening their oversight of issues such as talent, culture, equity, inclusion, and diversity. Given America's changing demographics and attitudes as well as the impact LGBTQIA+ inclusive policies may have on the company's bottom line, boards should take the opportunity to assess whether the LGBTQIA+ related policies and practices of the company and the board are oriented toward the future.”³

Recent research has put the spotlight on inclusion as a necessary ingredient to successful diversity. Inclusion focuses on actively embracing diverse perspectives and changing the culture to reflect them, rather than simply hiring employees with diverse backgrounds, and expecting them to fit into the existing culture. Importantly, any leader or employee can contribute to inclusion, regardless of background or demographic.

Inclusive leadership is critical to fostering an environment that is in constant pursuit of valuing and engaging all perspectives for the benefit of the organization. Russell Reynolds Associates (RRA) research shows that when employees consider their leaders inclusive, they are more likely to want to remain with the company, along with other positive results. Yet the measure of a culture's inclusivity ultimately lies with employees, and with those who have traditionally been marginalized.⁴

The Board Self-Assessment is an important, early step in achieving board diversity. It is helpful to have a clear view of the individuals that currently make up the board and the various dimensions of diversity that are represented. A sample tool is included: “Board Composition Matrix.” BoardEffect, an online resource designed to support boards and leadership teams, suggests a seven-step process to increase board diversity:

7 Steps to Increase Board Diversity for Nonprofits⁵

- Written by Lena Eisenstein

The demographics of nonprofit boards tend to follow the [trends of corporate boards](#). In recent years, corporate boards are recruiting more women for their boards, and they're having good

³ <https://boardleadership.kpmg.us/relevant-topics/articles/2021/the-imperative-for-lgbtq-inclusion.html>

⁴ <https://corpgov.law.harvard.edu/2019/05/20/unleashing-the-power-of-diversity-through-inclusive-leadership/>

⁵ <https://www.boardeffect.com/blog/7-steps-to-increase-board-diversity-for-nonprofits/>

success. There's also a move to recruit different ethnicities to boards, and that effort has been a bit slower. The conversation of diversity within nonprofit boards is just as important as it is within corporate boards.

While women and people of color help to diversify boards, it's important not to overlook other dimensions that shape discussions and [bring diversity into the boardroom](#).

In considering your recruitment efforts, consider these **attribute markers**:

- Age
- Gender
- Background
- Ethnicity
- Culture
- Experience
- Nationality
- Sexual orientation
- Education
- Professional background
- Level of ability
- Socio-economic status

Note: Here we would also recommend adding geographic representation, especially for nonprofits that are serving multiple municipalities and/or regions.

Boards are more in tune with the needs of the people they serve when they are comprised of the same demographics. Strong debates are healthy, and many perspectives coming together in the boardroom make for robust discussions and good decision-making.

The lack of diversity can cause “groupthink”⁶ and lead to harmful outcomes in the communities where they serve. **Best practices for nonprofit board diversity encourage nominating committees to do comprehensive outreach in their recruitment efforts.**

Diversity Adds Value for Nonprofit Boards

When nonprofit boards approach diversification with the intent of adding value to the organization, they're better able to tackle problems from many different angles. [Forbes magazine points to diversity and inclusion](#) as key drivers of internal innovation and business growth.

⁶ <https://www.psychologytoday.com/us/basics/groupthink>

That can only happen when boards allow diverse members to engage and take their opinions seriously. It's vital for boards to avoid recruiting diverse board members out of tokenism or for the sake of appearances. When diverse members voice their opinions, it helps others consider alternate points of view. Together they can identify and pursue opportunities for innovation. Healthy, well-rounded debates help nonprofit boards investigate issues thoroughly and critically.

If your board has been in existence for some time and it still lacks diversity, [it's important to consider why the board hadn't focused on diversity to this point](#). Your board will thrive by having a mix of personal, experiential, and other varied demographics.

If the board is relying completely on referrals from current board members, they're probably recruiting people just like themselves. That doesn't do much for nonprofit board diversity. However, all isn't lost.

When nonprofit boards understand the reasons they need to [increase diversity on the board](#) and make a commitment to seeking and recruiting a fully diverse board, it's the first step to breaking past practices and moving in a better direction.

Here are **7 steps** to get you on the path to nonprofit board diversity.

1. Bring biases out of the closet.

The first step is always the most difficult, but it's important to get the elephant out of the room. Put the issue of nonprofit board diversity on your agenda. When the item comes up at your meeting, have an honest, open discussion about it. Do your best to uncover any biases. As a group, identify specific issues that are contributing to overlooking diverse recruits or not reaching out to them at all.

2. Examine your recruiting and nomination processes.

Biases can shape the recruiting process if the committee doesn't have a [diversity policy](#) that outlines how to recruit a diverse board. Review your postings for board member recruiting and assess what kind of people they're likely to draw. Be sure to add a statement of inclusivity in your print and online postings if you have an open process. Also, check for any potential biases during the review process. Make sure that all candidates feel equally comfortable and that no one feels pushed out. (*Sample statements are located in the tools section of this toolkit on page 54.*)

3. Take a survey of your entire organization about diversity.

Evaluate whether the board's demographic matches that of the people it serves.⁷ If they're vastly different, and your survey results indicate that your members and others in the community don't recognize a diverse board, there's always a chance to make change as board vacancies open up.

4. Get the board in alignment with your vision for diversity.

Nonprofit board diversity won't happen without a concerted effort on everyone's part. Don't be afraid to be the lone wolf when it comes to taking a stance on diversity. Often, it just takes one person to bring it up for others to join the vision. As the momentum for a diverse board builds, be non-confrontational in your approach. Biases, in one form or another, are common. *(Refer to anti-bias concepts highlighted in the series training.)*

Please note: This is also an area where the board can take an inventory of its current practices and examine whether they unintentionally exclude diversity. For example, does the meeting time present a scheduling burden for working parents? Is the annual meeting in an off-site location difficult to reach by public transportation?

5. Decide on a new recruitment strategy.

If what you have been doing is not working, it is time to change things up. Cast a wider net to find some new people. Tap into social media outlets like Facebook and LinkedIn. Network with other nonprofits that have diverse board policies and find out what works for them. At the Foundation, the CEO was authorized to reach out directly to those he had worked with on various initiatives that might not have been known to the board committee responsible for board development. CEOs and other staff can help bridge outreach goals for the board. *Reach out to your community and begin authentic conversations about your goals to be more diverse and inclusive.*

During your recruitment process, it is important to focus on each candidate's skills and experience first, then their unique attributes that add to your DEI goals. *Be intentional about your goals.* All things being equal, it is appropriate to prioritize under-represented populations.

6. Portray diversity in your promotions.

A picture is worth a thousand words. Review your website, brochures, and presentations. Social media offers the ability to reinforce your interest in bringing greater diversity to your organization. Do your messages reflect the type of diversity that you want to attract in new board members? If not, it's time for an update on the promotional media that you use for outreach.

⁷ See Board Composition Matrix in the Tools on page 53.

7. Draw potential recruits from your current membership and your community.

Tap into the individuals that you serve. Seek out those who have demonstrated an interest in your events, activities, and fundraisers. Engage those who have shown an interest in your mission. Have you considered that they may be the best people to serve as your next board members?

Once you have reached your goal of nonprofit board diversity, make a conscious effort to avoid tokenism and allow diverse board members to serve their intended purpose. If you only selected them to check a box, they probably are not serving as true board members, and you are defeating your purpose. Boards that are successful in developing a culture of inclusivity will benefit as the boards become more adaptable, more effective, and excel with risk management.

Below are four recommended principles to follow when recruiting a more diverse board⁸:

1. Focus on what people will do rather than who they are or what abilities they possess. Do not assume that someone will take certain actions because they belong to a particular socioeconomic, racial, or ethnic group. A Board of Directors must explicitly communicate its expectations of responsibilities for its members.
2. In order to eliminate the possibility of tokenism, consider adding more than one new board member from an underrepresented group at a time. By doing so, individuals can feel like they are part of an incoming class and will have a friend in their early tenure. Having a class can also help avoid the perception that any one individual represents a whole community's views can be avoided. New individuals may also feel encouraged to seek leadership roles.
3. Recruit board members from organizations beyond traditional community-based organizations. Consider reaching out to sororities and fraternities, alumni organizations, and minority professional and business groups. (See "Diverse Community Organizations" on page 70.)
4. Review current expectations for board membership to make certain they are beneficial and supportive of an inclusive board of directors, rather than making exceptions for "diverse board members".

Remember, having specific giving levels or requiring members to secure donations can create unintended barriers to board recruitment efforts. Good board members may offer time, talent and expertise that far outweigh monetary gifts.

⁸ Adapted from Recruiting for Board Diversity: Part 3 in Diversity Series by Jan Masaoka on December 14, 2009, <https://blueavocado.org/board-of-directors/recruiting-for-board-diversity-part-3-in-diversity-series/>

21 DAY EQUITY CHALLENGE

The 21 Day Equity Challenge is designed to create dedicated time and space to build more effective social justice habits, particularly those dealing with issues of race, power, privilege, and leadership. This challenge was originally developed by Dr. Eddie Moore, Jr., Dr. Marguerite Penick-Parks, and Debby Irving, and was adapted by Food Solutions New England.



United Way of the Greater Capital Region has adapted the challenge for New York's Capital Region in collaboration with many community partners. These challenges contain information about IDEA terminology, videos, and resources to prompt crucial conversations, and tools to help reflect about inequity in the Capital Region. Below are links to the prompts hosted on United Way's website at <https://www.unitedwaygcr.org/EquityCatalogue>.

1. **Day One:** [Personal Racial Identity](#)
2. **Day Two:** [Understanding and Reflecting on Our Bias](#)
3. **Day Three:** [What is Privilege?](#)
4. **Day Four:** [Talking about Race is Challenging For Some. Here's Why.](#)
5. **Day Five:** [Trauma to Healing](#)
6. **Day Six:** [Levels of Racism](#)
7. **Day Seven:** [Opportunity in the Capital Region](#)
8. **Day Eight:** [Segregation in the Capital Region](#)
9. **Day Nine:** [Housing Inequity in Your Backyard](#)
10. **Day Ten:** [How Your Race Affects Your Health](#)
11. **Day Eleven:** [What is Environmental Racism?](#)
12. **Day Twelve:** [The Racial Wealth Gap](#)
13. **Day Thirteen:** [Behind the Starting Line - Racialized Outcomes in Early Childhood](#)
14. **Day Fourteen:** [Education & School-Aged Children](#)
15. **Day Fifteen:** [Adverse Childhood Experiences](#)
16. **Day Sixteen:** [Equity & The LGBTQ+ Community](#)
17. **Day Seventeen:** [Building a Race Equity Culture](#)
18. **Day Eighteen:** [Being an Ally](#)
19. **Day Nineteen:** [Tools for the Racial Equity Change Process](#)
20. **Day Twenty:** [Final Reflections](#)
21. **Day Twenty-One:** [Take Action in the Capital Region](#)

SUMMARY OF INCLUSION SESSIONS

Session I: Building a Foundation of Diversity, Equity, and Inclusion

The need and interest to advance diversity, equity, and inclusion have significantly increased in the past year, especially on nonprofit boards. A common question leaders ask is “we care about this issue, but where do we start?” In this session, Kathleen McLean of the *McLean Group* shared strategies for how to begin the DEI journey at your organization. Participants learned the historical context of systemic oppression in the United States and gained a better understanding of the need for change, reviewed the common language of diversity, equity, and inclusion terminology, identified ways to build a case for DEI, and prepared a change management strategy. The following steps were shared to help participants further their journey:

- **Complete a diversity audit:** Take an assessment of the demographics of your community and ask, "Does your board reflect your community?"
- **Develop a recruitment strategy:** Start to build relationships with your community and your targeted audiences.
- **Ensure your board is relevant:** Always listen to what your community needs and how it is changing.
- **Review your bylaws:** Are there phrases, terminology, or policies that are exclusionary? Look to see how your organization needs to change to become more inclusive.
- **Don't only focus on the people you know:** Get outside of your comfort zone and engage with more diverse voices in all aspects of your life. Having diverse voices allows for more fact finding, divergent thinking, ideation, alternatives, and positive conflict.
- **Don't engage in "either or" thinking:** Stop thinking you will compromise skills and talent when striving to diversify your board. Focus on the competitive advantage and the robust understanding of opportunities your organization will have when embracing DEI on your board.

Session II: Building a Culture of Inclusivity and Impact

Amidst increased activism and greater pressure from funders and state legislation, there has been a growing push for corporate and nonprofit leaders to increase board diversity, build more inclusive cultures and drive equitable outcomes. Yet in the current climate, you may not know where to begin in creating brave spaces that enable more effective cross-cultural communications. In this workshop, Anniedi Essien and Christina Farnacci-Roberts of *W.I.D.E Dynamic Dialogue* equipped leaders with strategies to shift from awkward silence and inaction to dynamic dialogues that help shape creative assessment, planning and sustained progress with DEI efforts. Following the session, the presenters provided these key takeaways from the session:

- Now is an ideal time to reevaluate your organization’s approach to traditional DEI work so you can be more responsive to emerging developments within a rapidly changing landscape
- Siloed approaches are ineffective to cultivate workforce well-being, and top nonprofits must keep pace with intersectional issues that touch upon diversity, inclusion, equity, belonging, justice, and wellness
- To boost community engagement, organizations must use a more holistic and integrated framework that recognizes the ways people’s multifaceted identities affect the way they are seen by, engage with and navigate the world around them

- Executive leaders must consider and leverage how the integration of Wellness, Inclusion, Diversity, and Equity (W.I.D.E.) can optimize performance, profitability, and impact
- Board leaders must reflect on how stakeholders' intersectional identities and diverse experiences can be viewed as strengths that are leveraged to increase inclusivity, maximize impact, and improve cross-cultural communications
- Bias is a prejudice in favor of or against one thing, person or group compared with another and can be explicit (the attitudes and beliefs we have about a person or group on a conscious level) or implicit (the attitudes and beliefs we have that affect our understanding, actions, and decisions in an unconscious matter)
- EVERYONE has bias; it is inescapable and a natural function of our brains; however, it can and should be mitigated to avoid negative consequences
- Nonprofits should be aware of how unconscious bias insidiously embed itself into many facets of the work (particularly racial bias because it is a visible identity) and identify ways bias can affect volunteer recruitment, board representation, fundraising, capacity building, and program development, delivery, and marketing
- Board members and executive leaders can mitigate bias by using the following tactics:
 - engage in intergroup contact, counter stereotypes, and practice mindfulness
 - practice "blind" applications and use outcome-based criteria, create inclusive rules, and pause and justify your actions
 - expand the pool and diversify decision-makers at all levels

Session III: Moving from Learning to Action

Based on feedback from local nonprofits, the most difficult part of the journey to advance equity is moving from learning to action. In the first two workshops, we learned how to build a case for DEI and strategies to create inclusive cultures. This session explored how systemic oppression shows up on nonprofit boards and outlined strategies to advance our DEI goals. The workshop began with a two-hour training by Lyndon Cudlitz of *Lyndon Cudlitz: Consulting, Educating, and Training*, who dived into these issues and provided actionable next steps. The training was followed by a panel discussion with Hon. Dorcey L. Applyrs, DrPH, Marcia Cognetta, and Alfredo Medina, Jr., Ph.D., moderated by Angela Dixon. Each shared experiences serving on boards and provided strategies to advance inclusion.

Lyndon shared this quote: **"There is a significant difference between all are welcome here and this was created with you in mind"** by Dr. Crystal Jones to encourage board leaders to reframe their thinking about their spaces.

The following suggestions were made related to JEDI (Justice, Equity, Diversity, and Inclusion):

- **Diversity:** Reflect and recruit to get different people on your board, including parents, people you serve, transgender people, people living in poverty, and people with disabilities.
- **Inclusion:** Build an inclusive culture by creating an inclusion statement; post board openings publicly; recruit contacts from historically excluded groups and encourage a community on the board.
- **Equity:** Ensure equity on the board by dismantling barriers for participation and engagement including: making the meetings at accessible times, holding it in spaces with all-gender restrooms, ensuring it's accessible by public transportation, providing live captions for online meetings or another form of transcription or interpretation.

- **Justice:** Push forward and promote justice by creating procedures to uplift everyone on the board such as: organizing childcare support, advocating for restroom access, providing bus passes, or holding American Sign Language classes.

The session also dove into reframing the common struggles organizations articulate when they are attempting to recruit diverse members:

1. We cannot find qualified candidates.

- a. Instead, reframe to think, “Why don’t qualified candidates want to join us? What barriers are preventing people from joining us?” How do we widen our circle?
- b. Drop degree requirements and giving expectations
- c. Highlight and value skills, knowledge, passion, life experience, and non-traditional education
- d. Examine your bias and assumptions, such as judging how well someone writes or speaks English, who you consider palpable or professional. Instead of saying not a right culture fit, ask if they add to our culture.

2. We need more diversity, but we don’t want to tokenize people.

- a. Start with the women, BIPOC, queer and trans people, people with disabilities, and immigrants already connected to your organization or networks
- b. Make the board recruitment “asks” relevant to the whole person’s work, skills, and experiences
- c. Be honest and transparent during the recruitment about reasons for your outreach to them and the current climate at the organization and on the board
- d. Inquire about needs for a member to participate at their fullest
- e. Don’t expect a person to recruit from their own community right away without building a relationship and new levels of trust

3. I want to know what the XYZ community thinks. I need a second opinion, or I have a quick question.

- a. Compensate focus groups and community leaders from their expert consultation
- b. Don’t use staff/board for consultation when it’s not in the job description
- c. Pay consultants to save money, time, and reputation
- d. Show your organization’s commitment to DEI and invest in where you say you are
- e. Develop accountability partners of the same and different identities

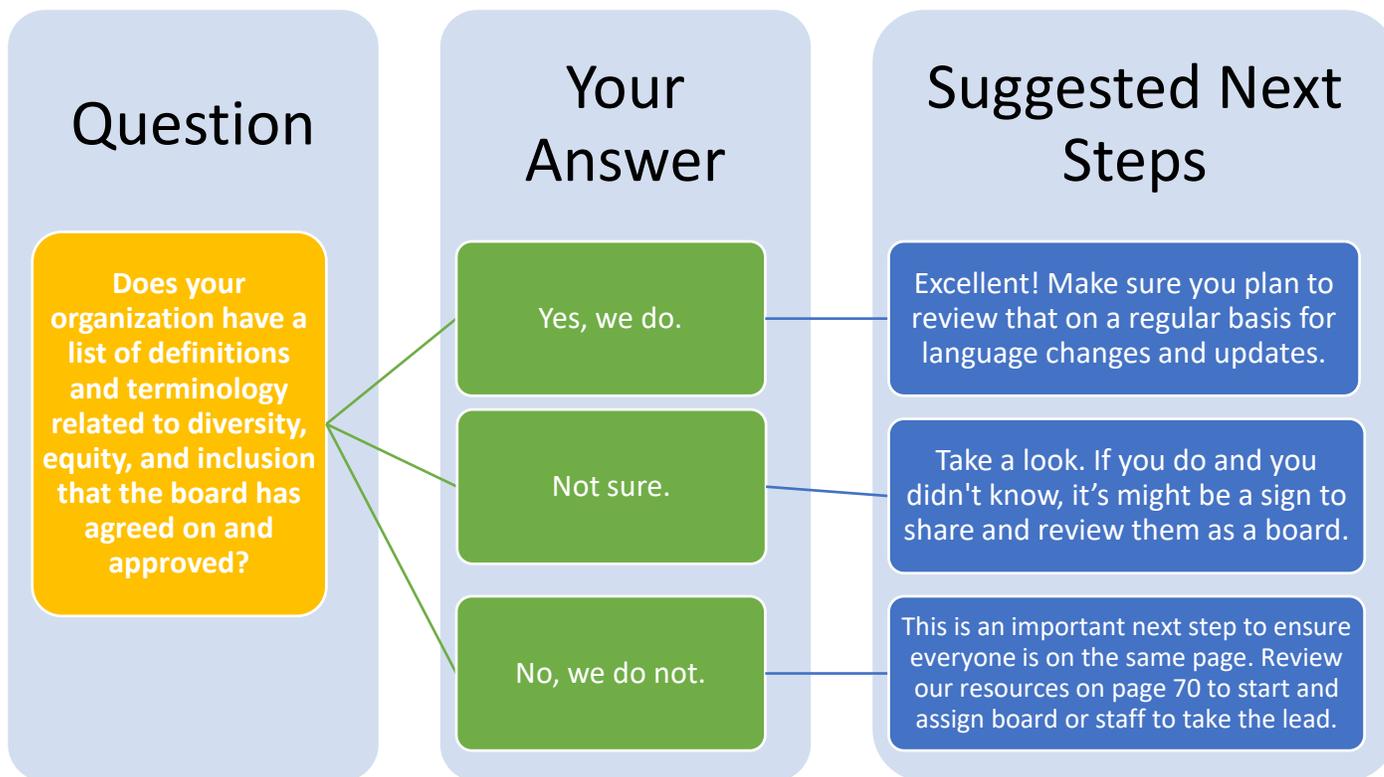
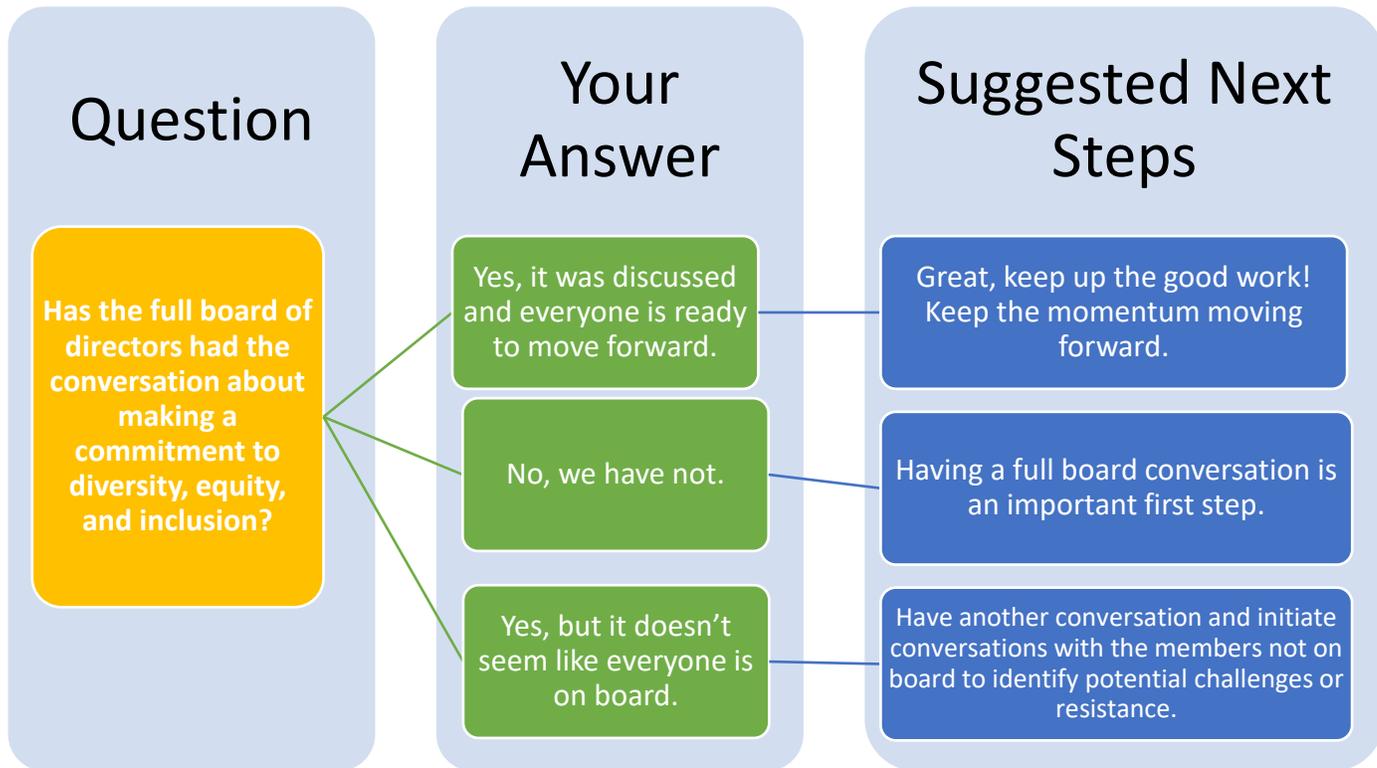
BOARD INCLUSION ROADMAP INSTRUCTIONS

Beginning on the next page, you will see the Inclusion RoadMap. The RoadMap consists of visual graphs providing a series of steps board leaders can take to advance equity on their board and in their organization. The steps are designed to help support you on the road towards an inclusive board and organization. However, please note these are only recommendations based on best practices and common experiences.

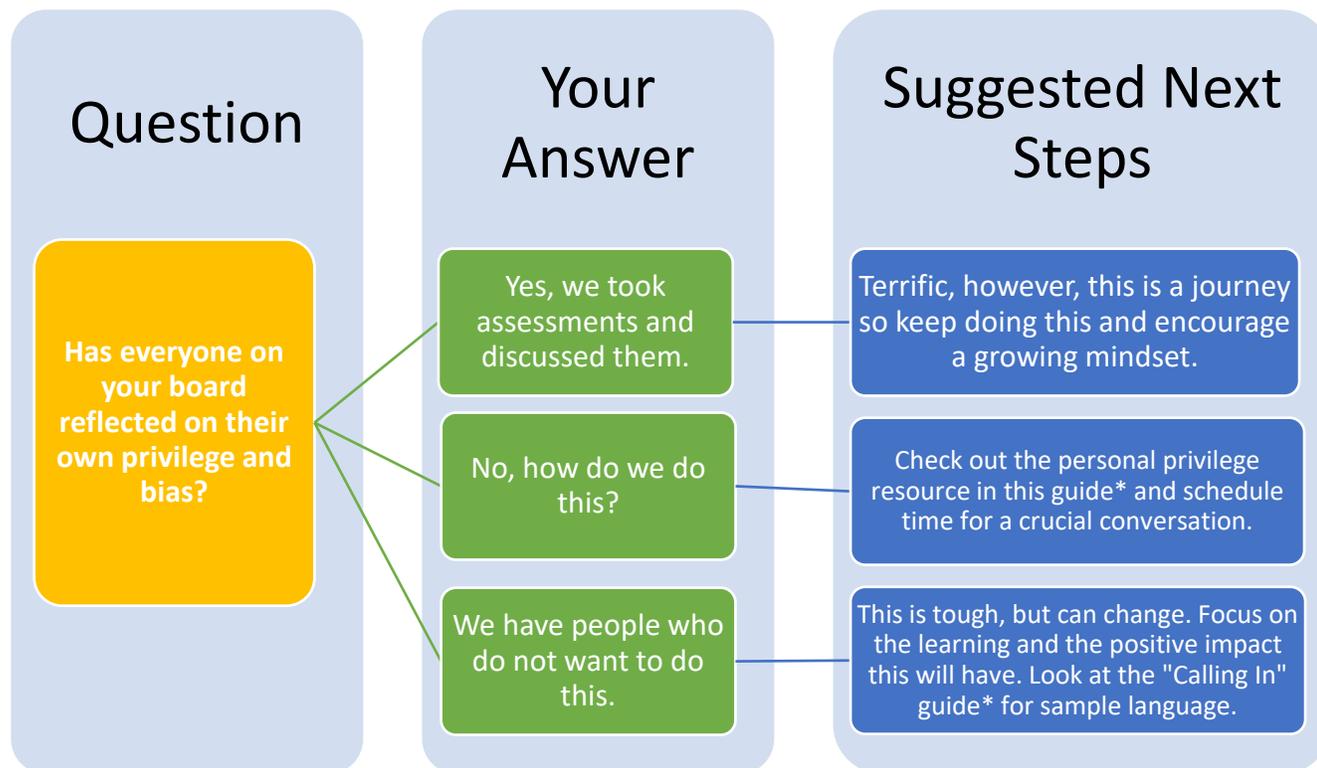
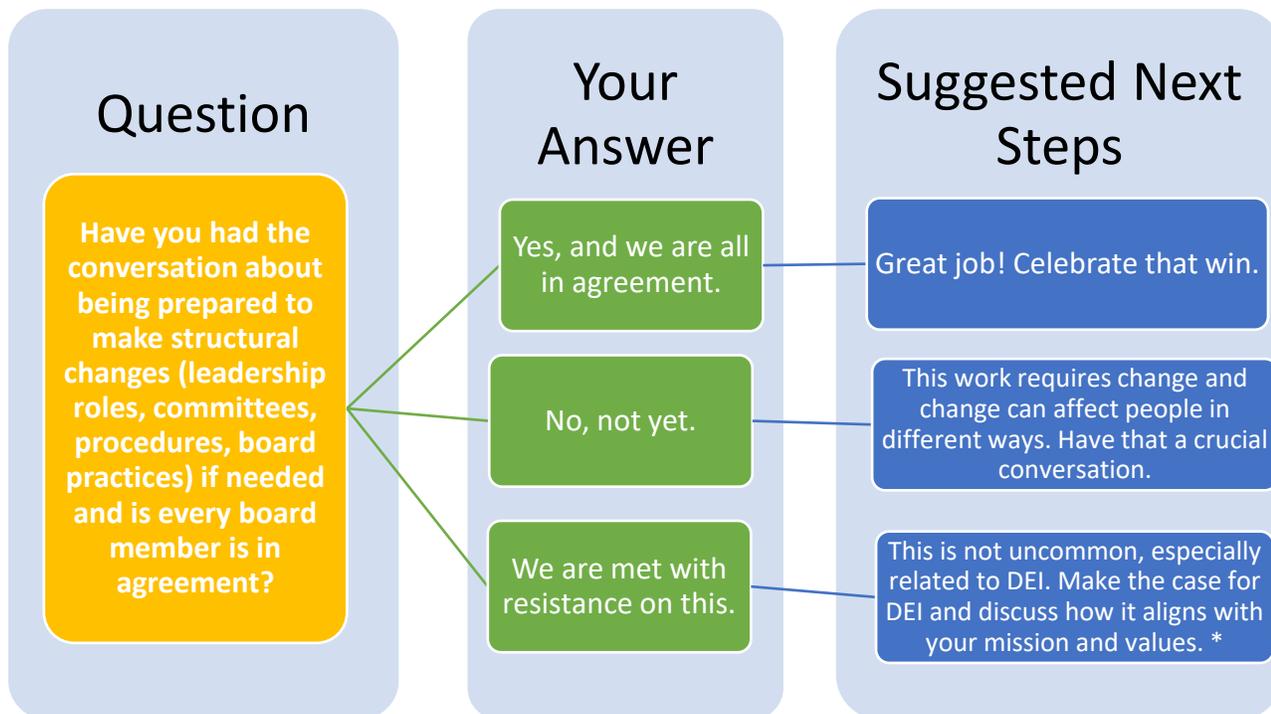
Each chart provides a question every board should ask itself, three potential responses, and suggested next steps for each question. The responses and suggested next steps are based on examples learned by experience and/or learned throughout the training series. As mentioned previously, these are recommendations based on common experiences boards face when trying to increase diversity. We hope the RoadMap will get you on a path towards a more inclusive board.

NONPROFIT BOARD INCLUSION ROADMAP

I. Introduction – Building the Foundation



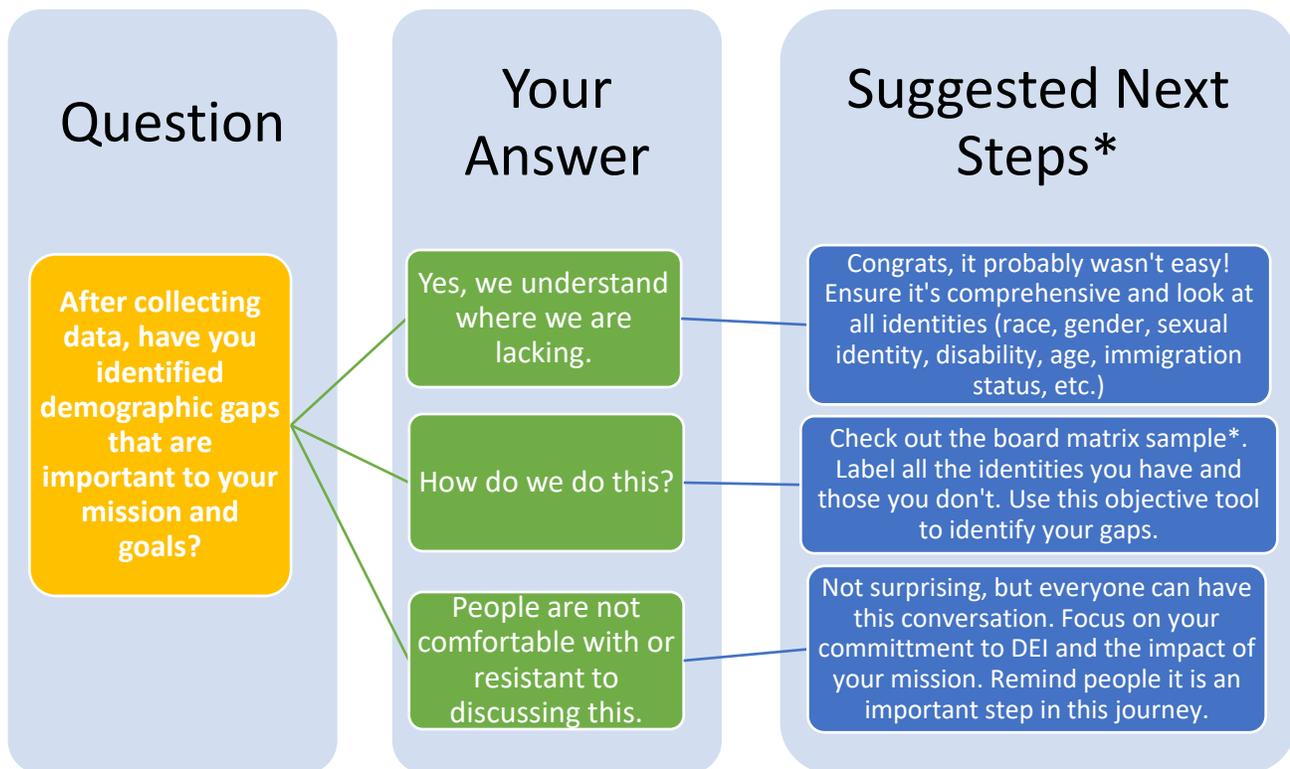
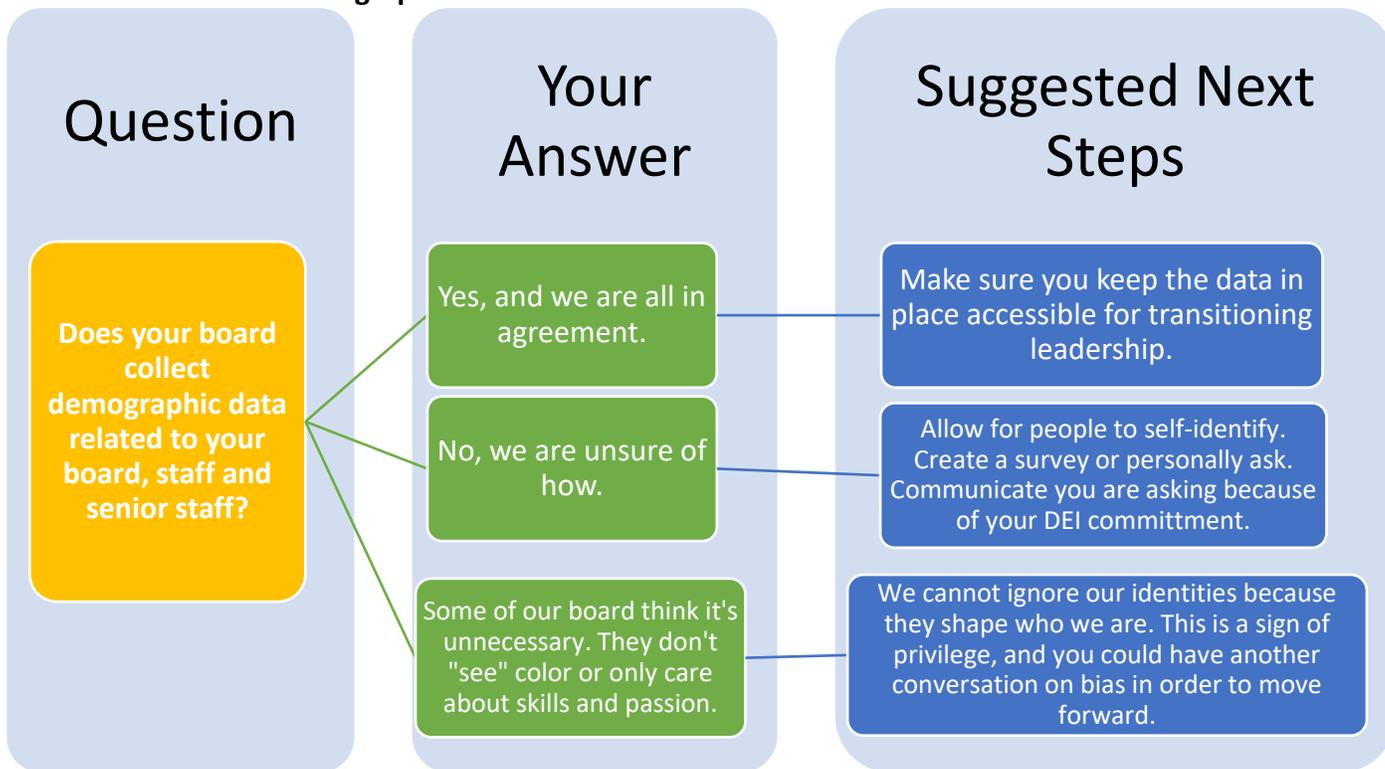
II. Structural and Behavioral Changes



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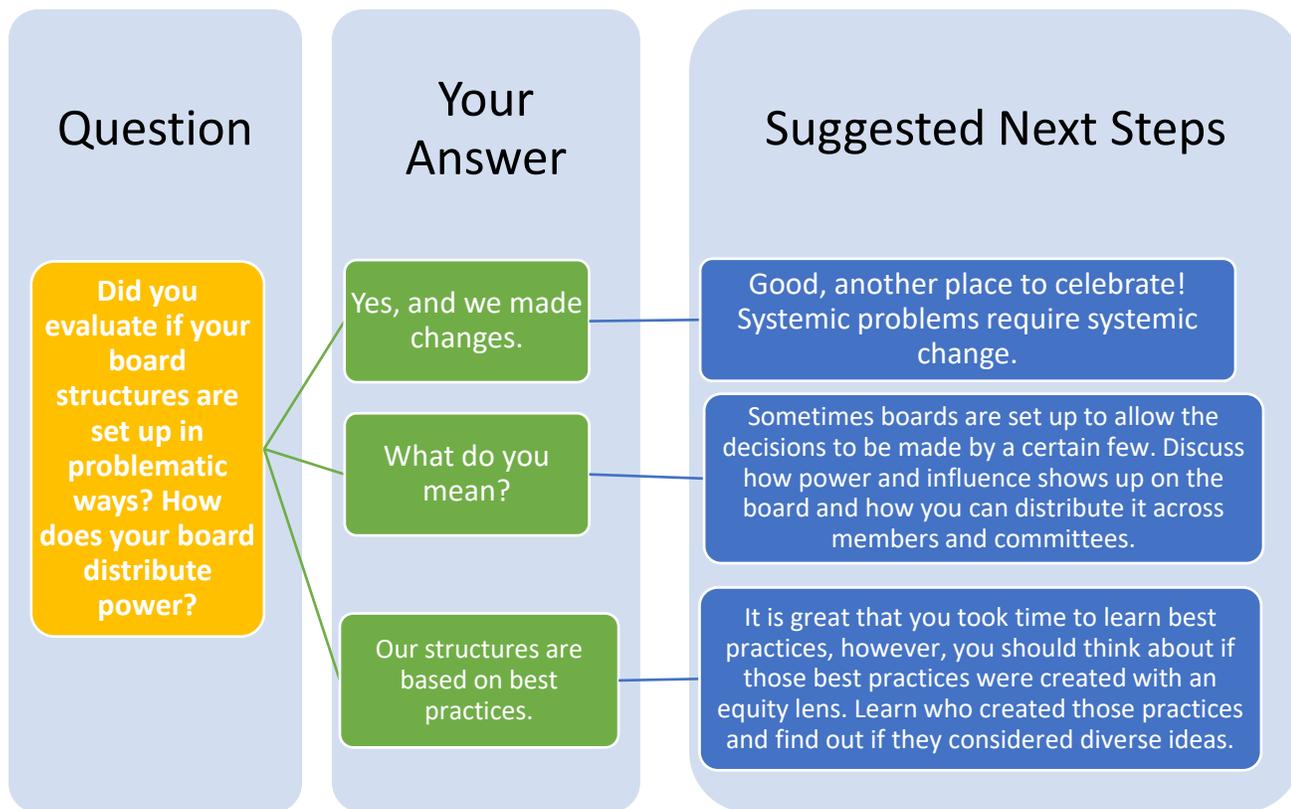
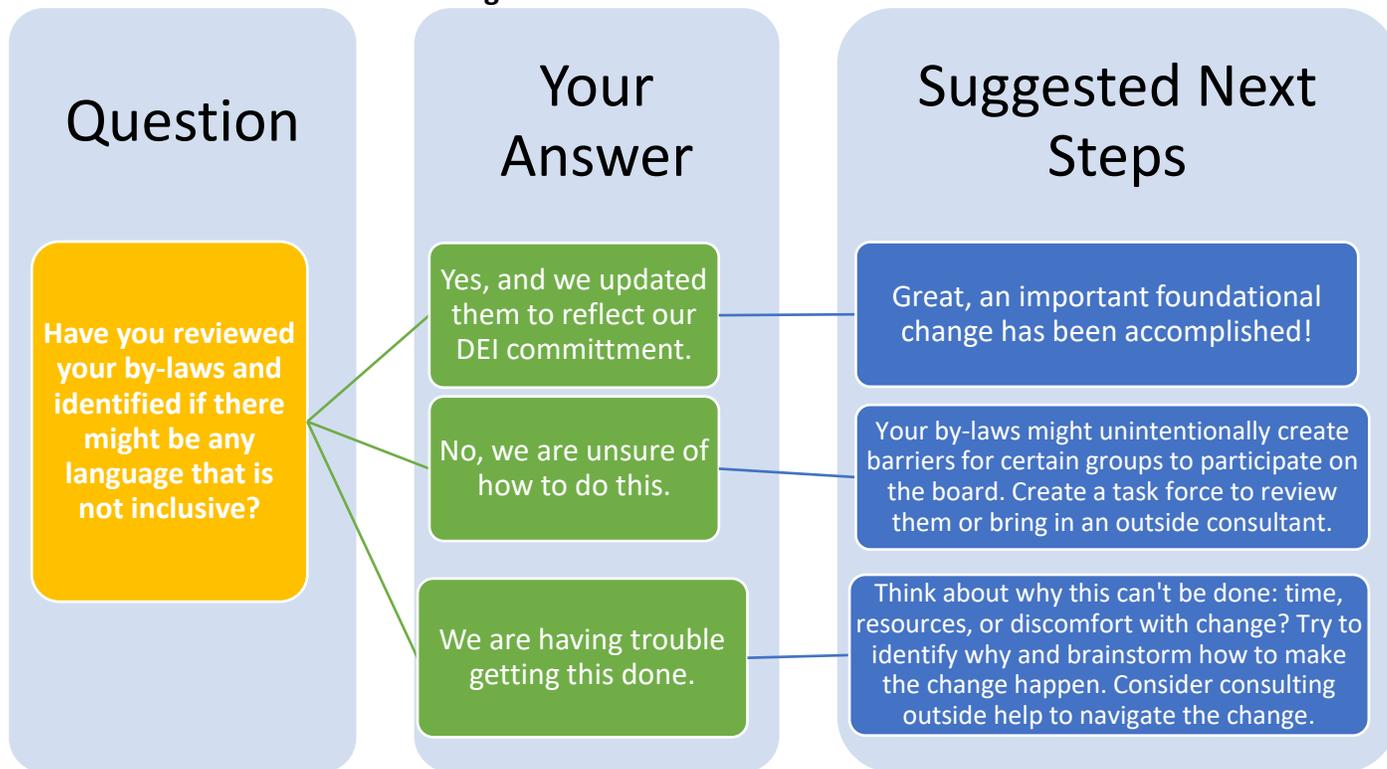
⁹ *Review the Session I summary to learn about change management on page 20. The personal privilege guide is on page 44. "Calling In" is on page 67.

III. Assessment – Demographic Data



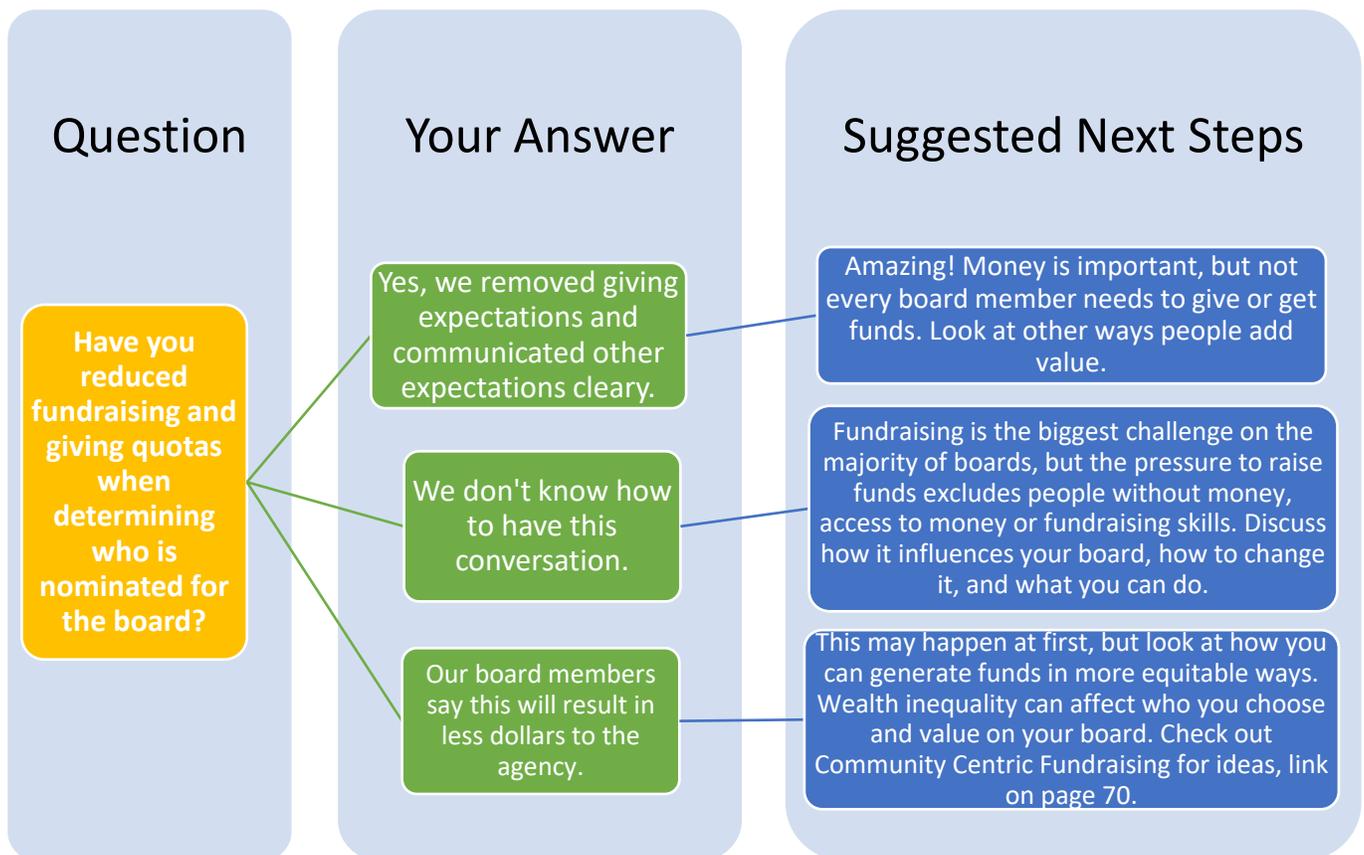
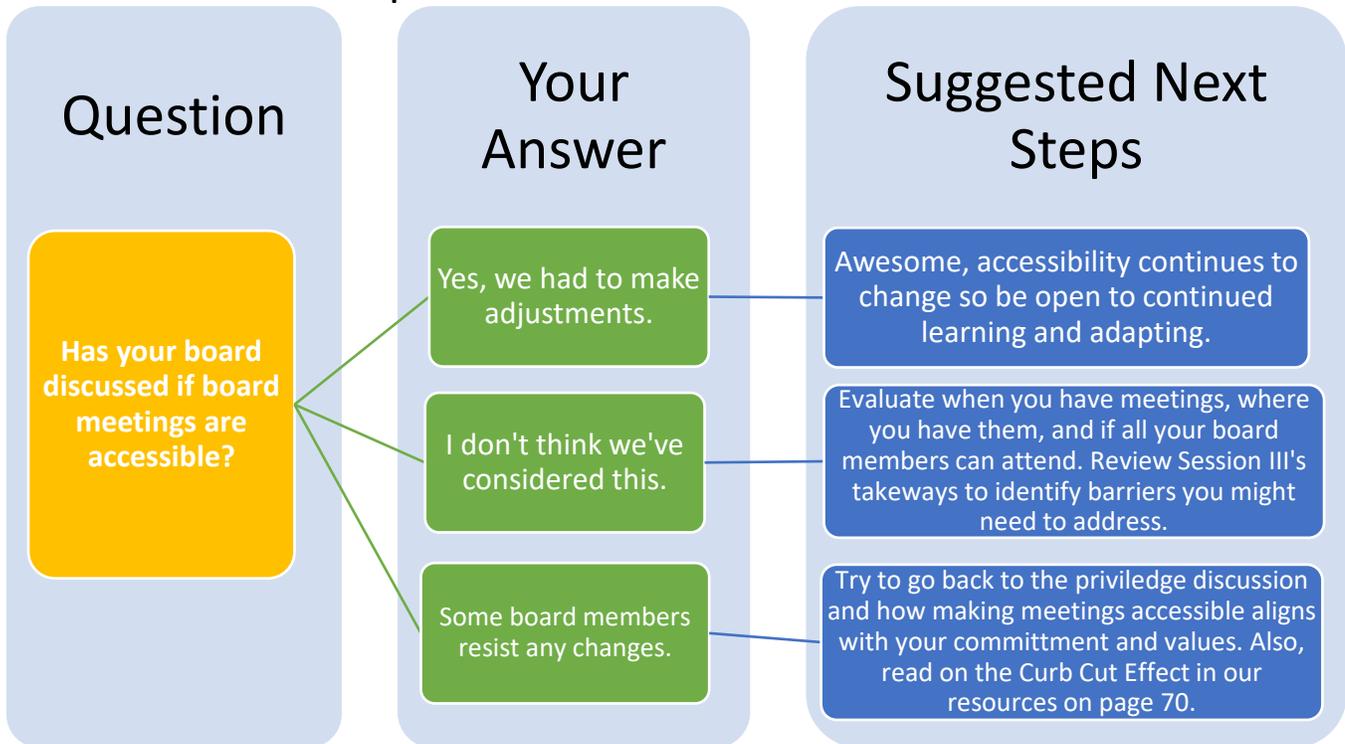
¹⁰ *A tip for everyone, it might be worth reviewing a resource (page 70) discussing race and privilege to ensure the conversation is respectful and inclusive. The board matrix sample is on page 53.

IV. Assessment – Structural Changes

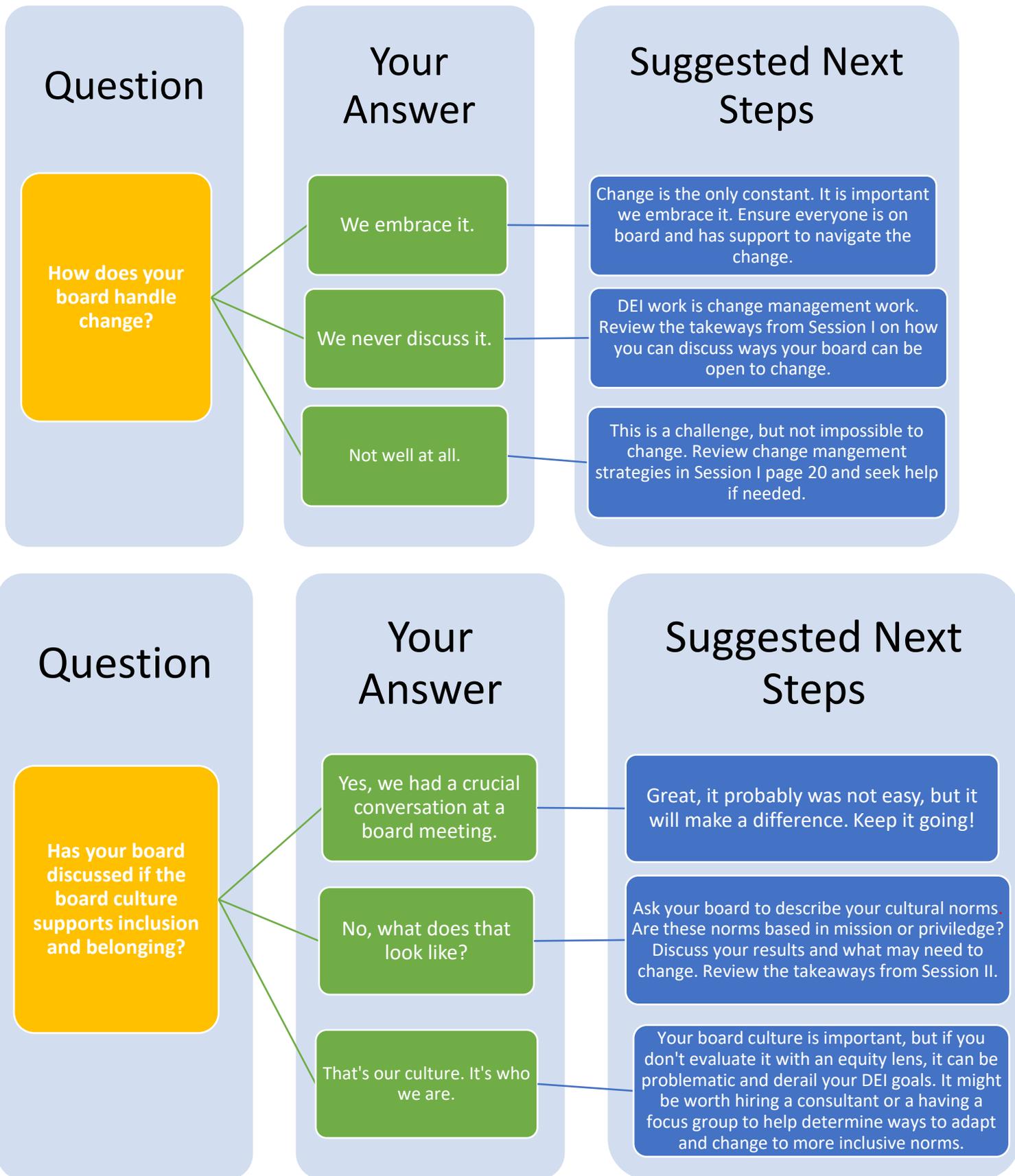


¹¹ If you need a consultant, check out the Consultant Directory located at www.cfgr.org/grants/nonprofitresources.

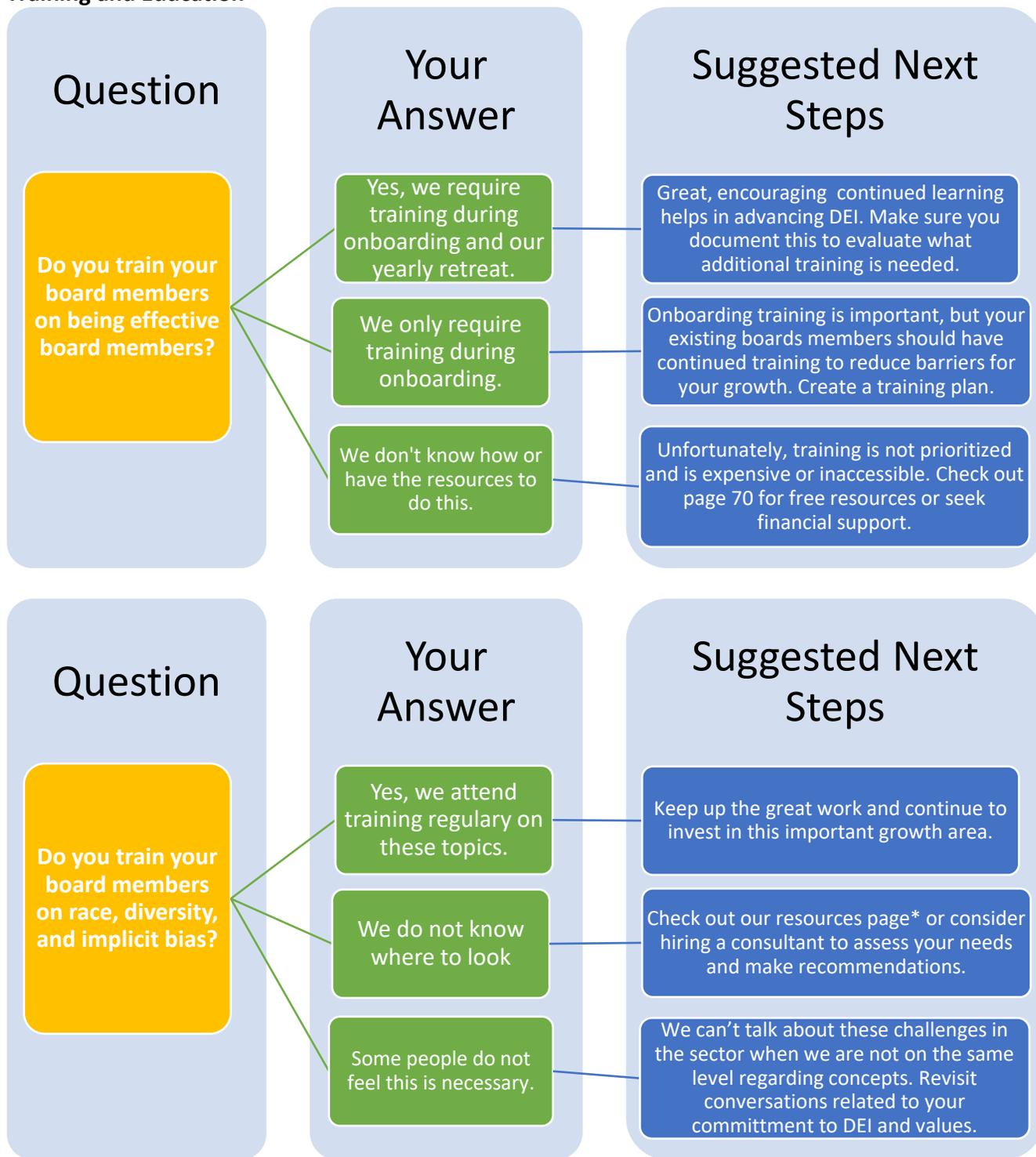
V. Assessment – Board Expectations



VI. Assessment – Board Culture

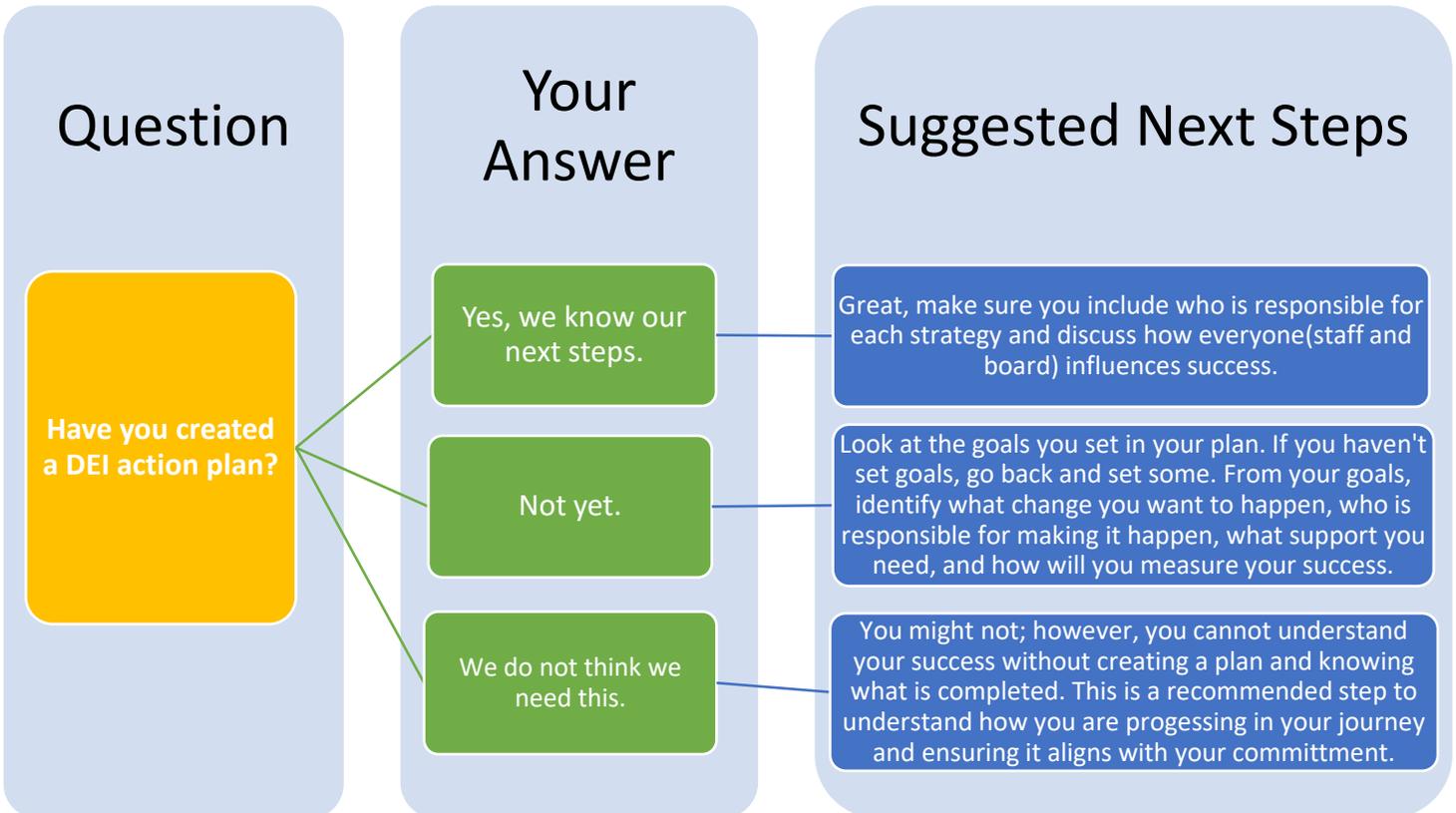
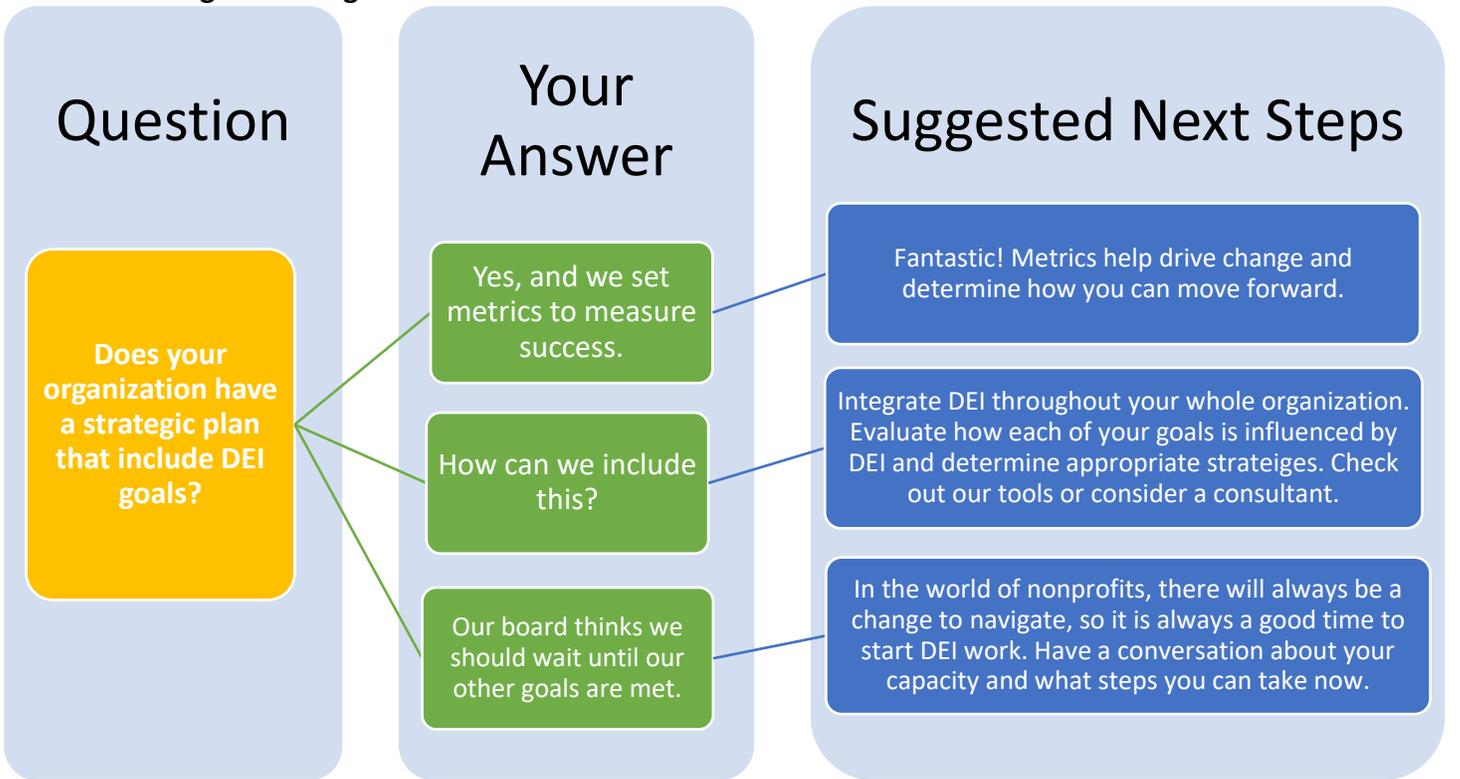


VII. Training and Education

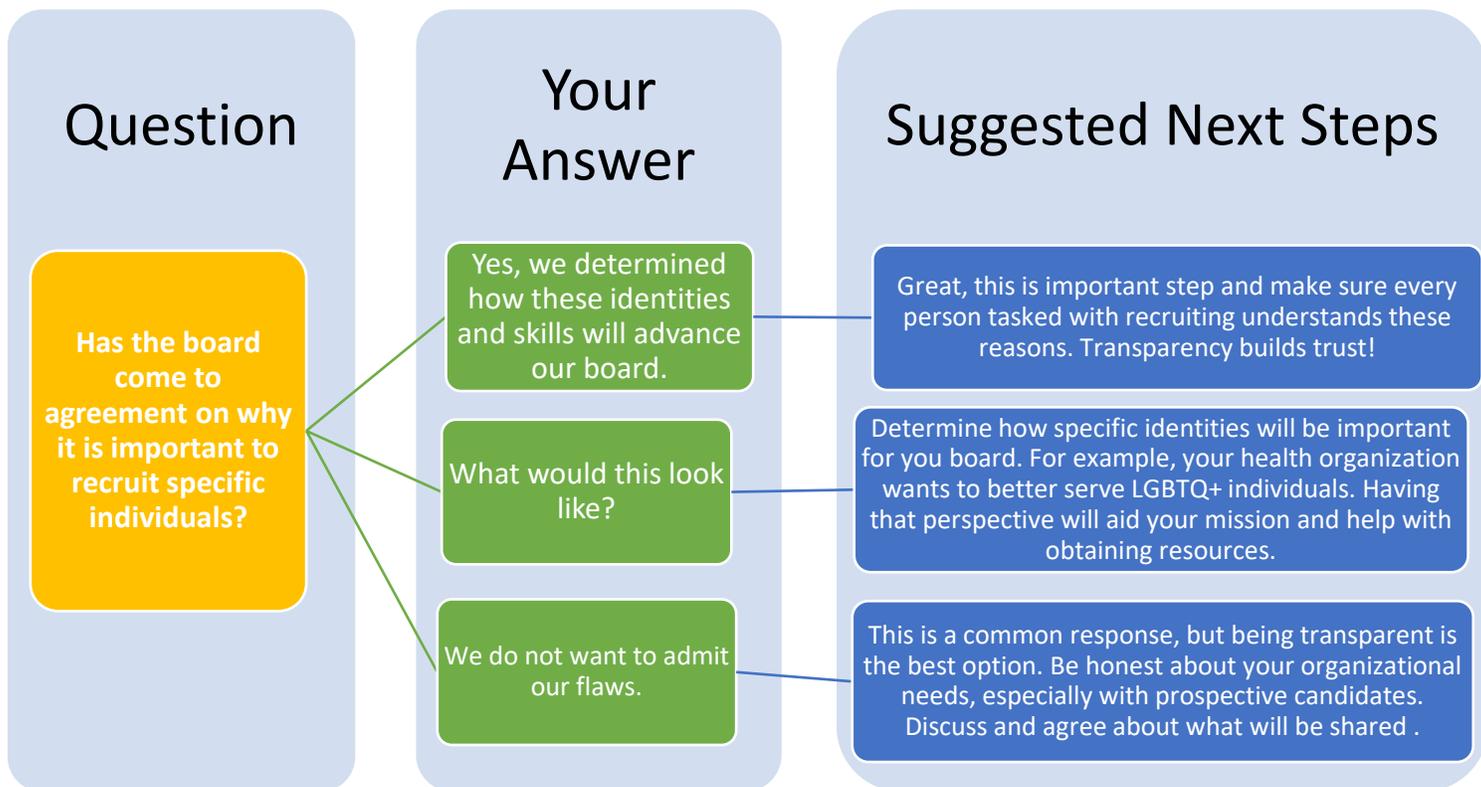
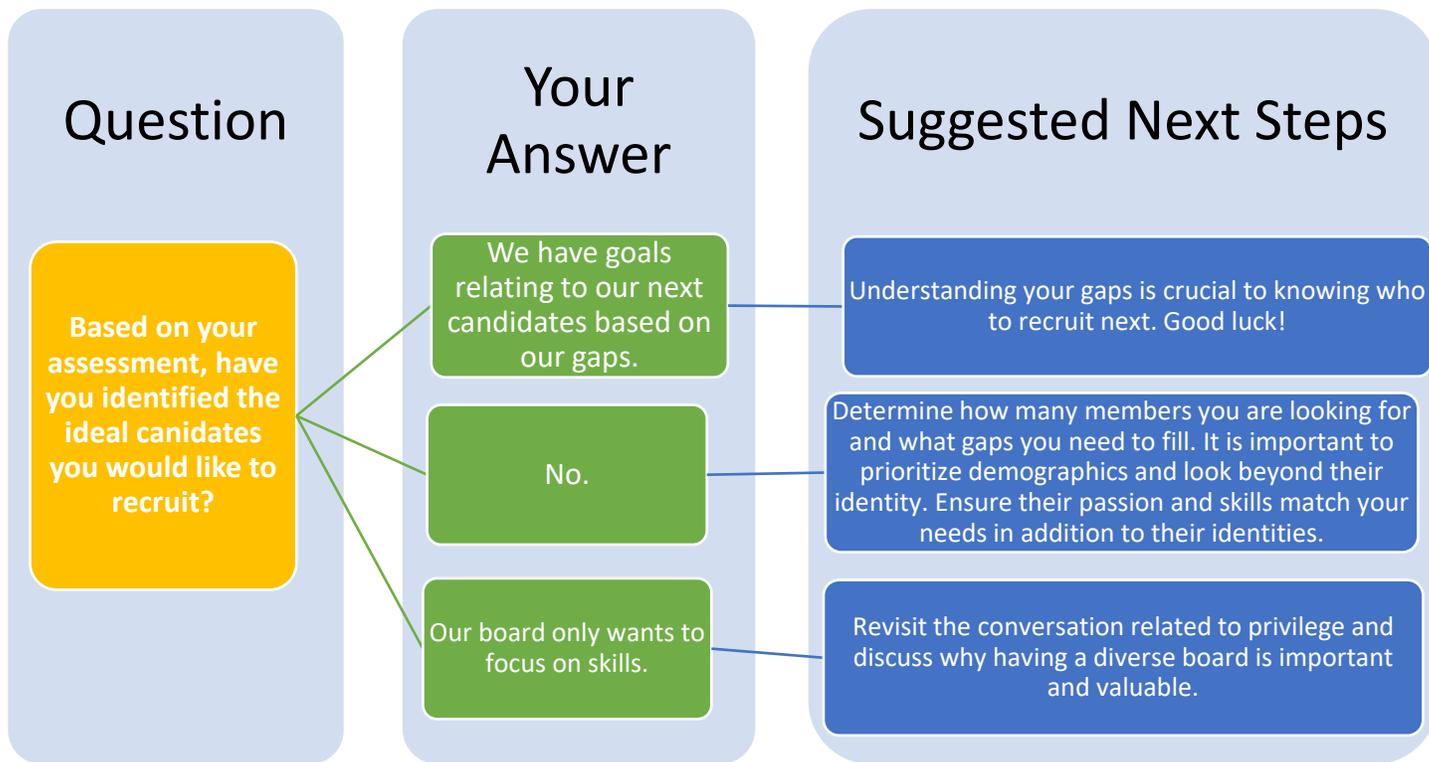


¹² * Our resources page is on [page 70](#).

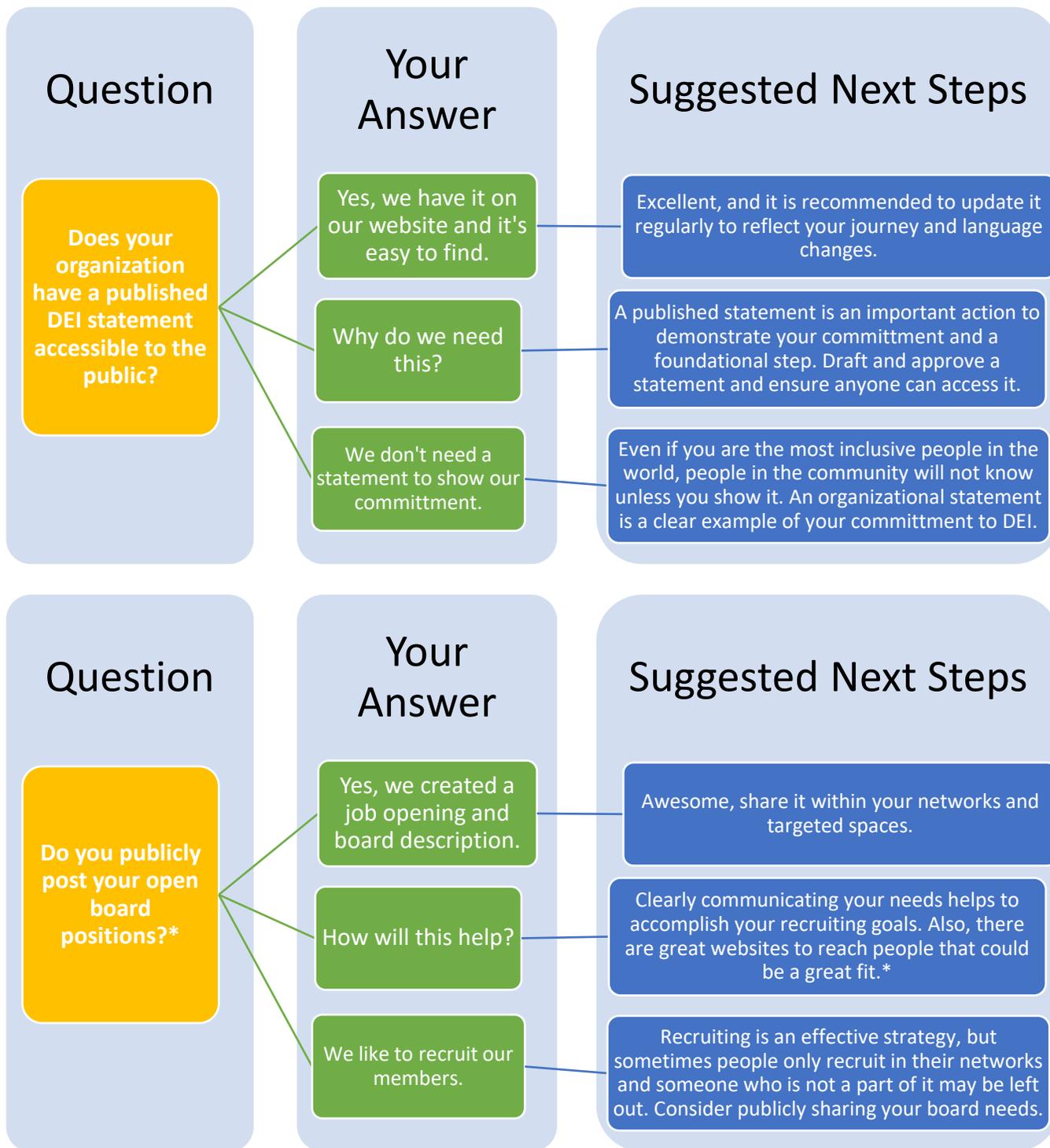
VIII. Strategic Planning



IX. Recruitment – Determining Your Next Candidates

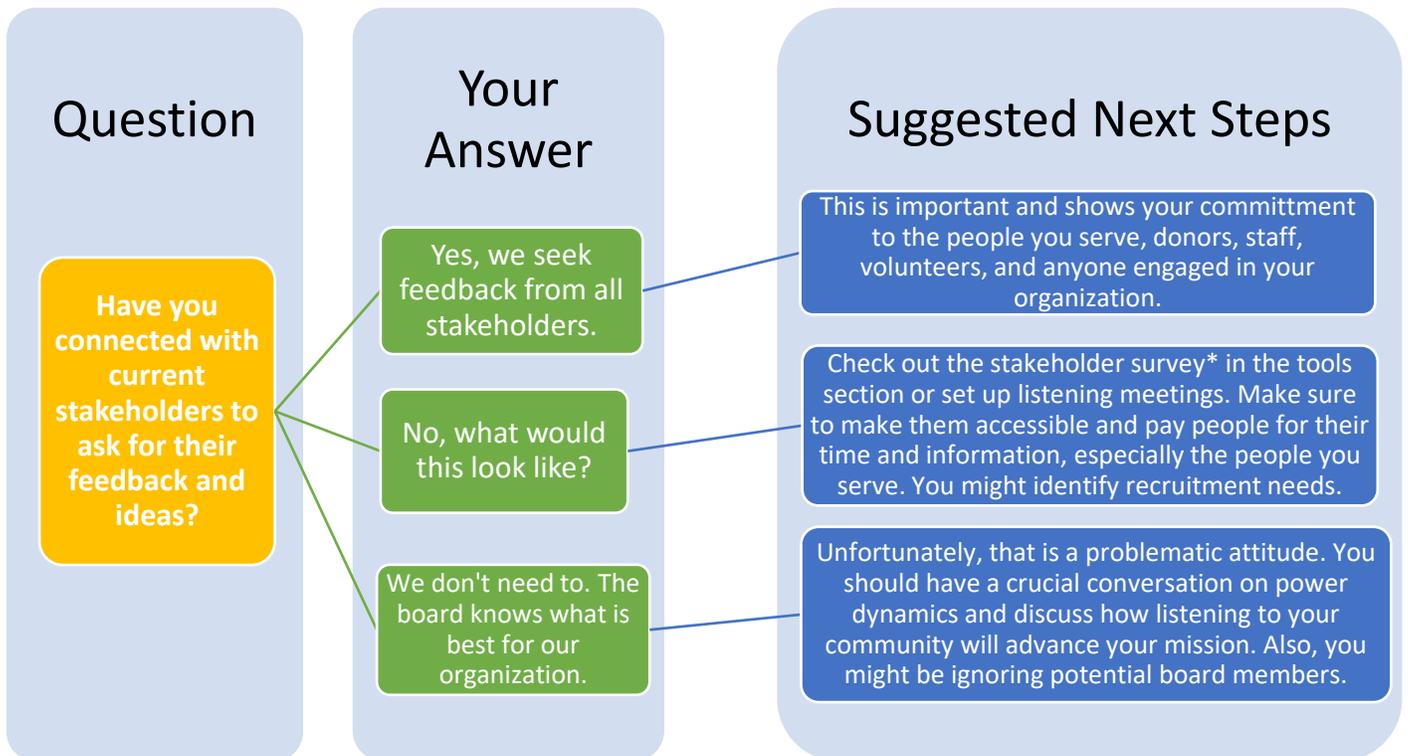
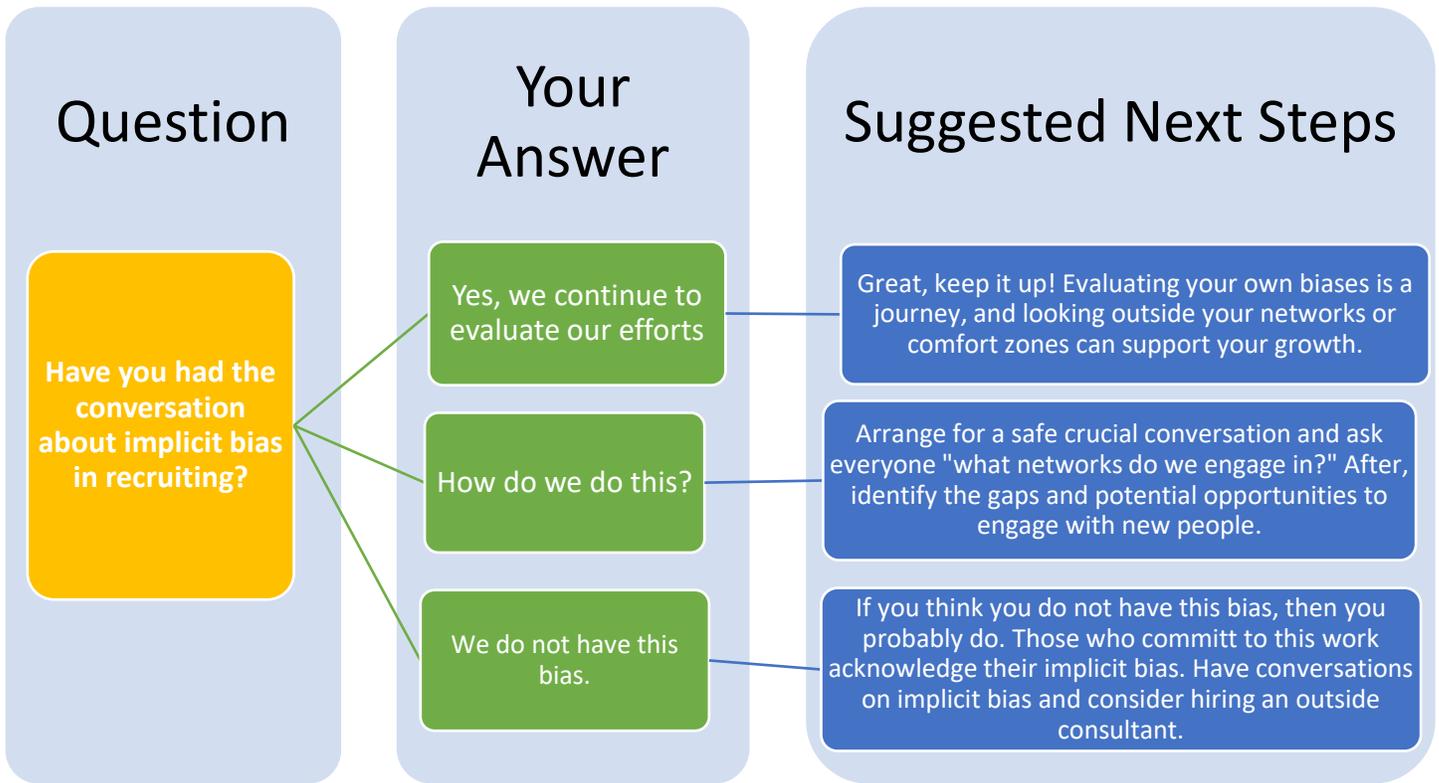


X. Recruitment – Communicating Your Commitment and Needs



¹³ *Consider posting your board opportunities with [BoardStrong.org](https://www.boardstrong.org/), [United Way's volunteer site](https://www.unitedway.org/volunteer), and sharing with [the Community Foundation](https://www.communityfoundation.org/).

XI. Recruitment – Networking and Personal Outreach

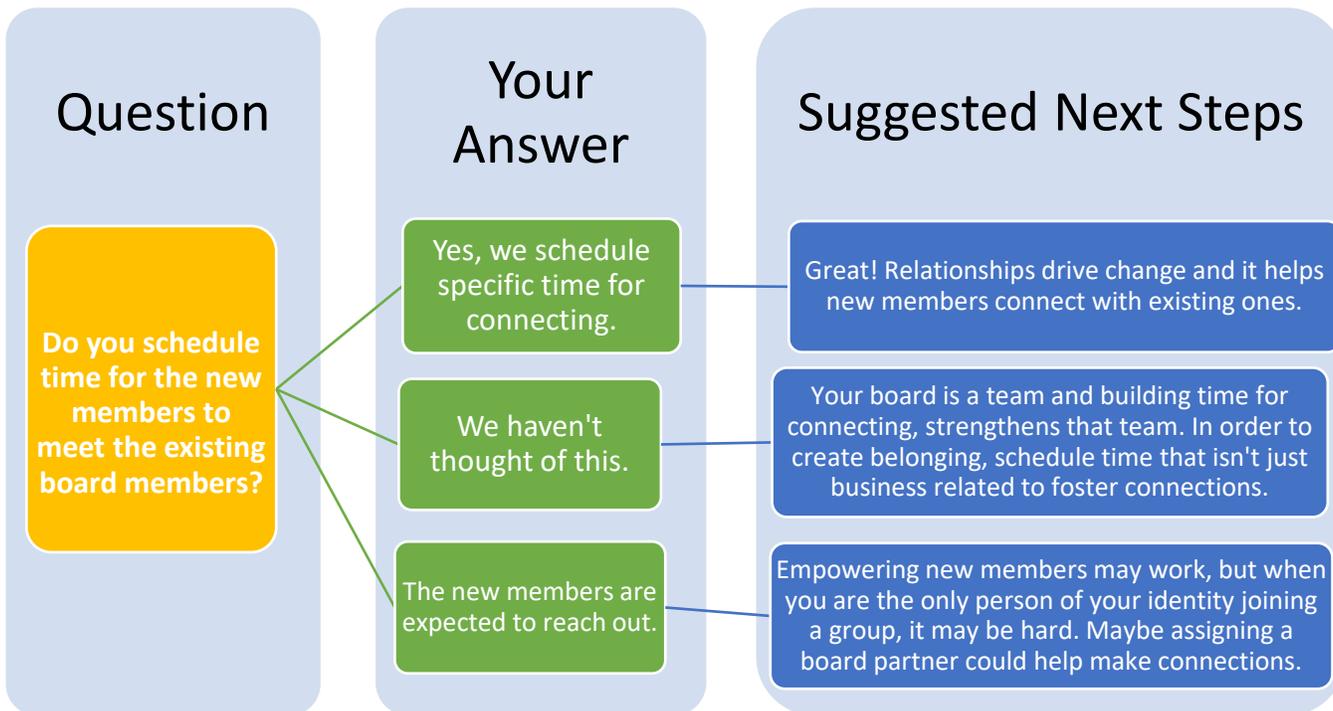
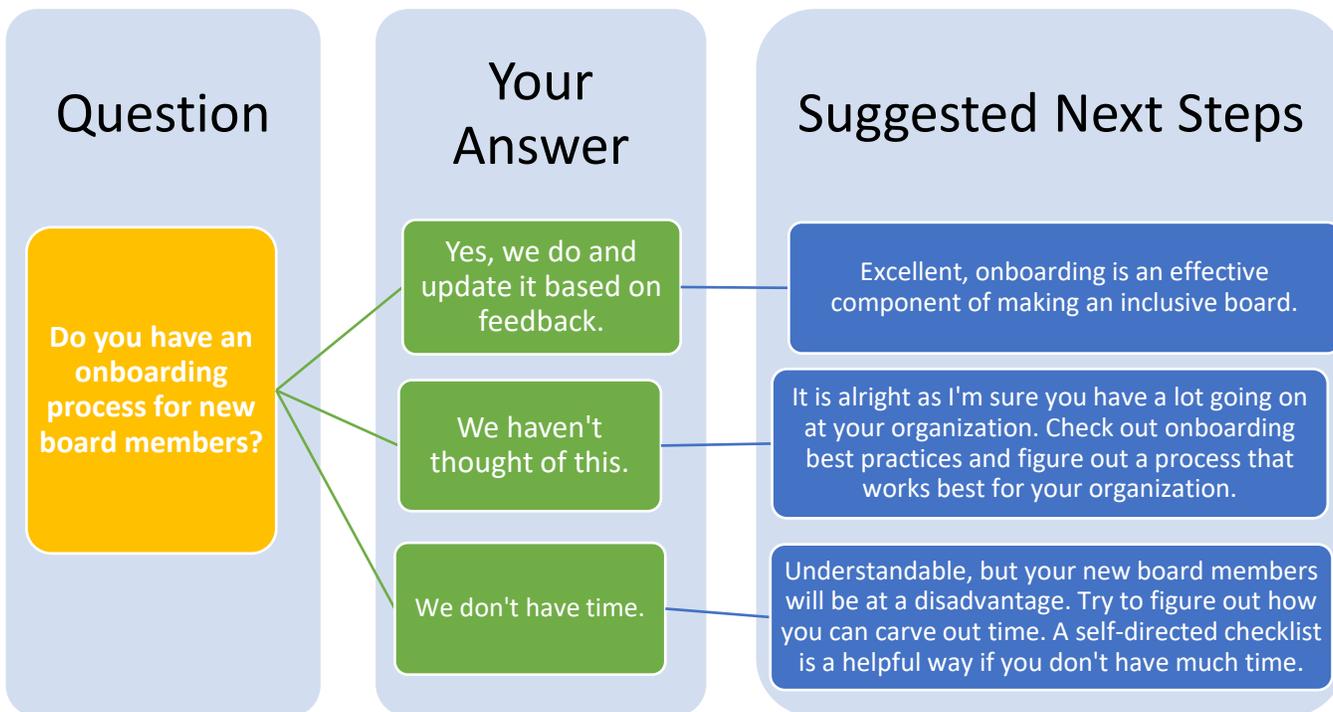


¹⁴ *The sample stakeholder survey is on page 60.

XII. Recruitment – Community Partnerships

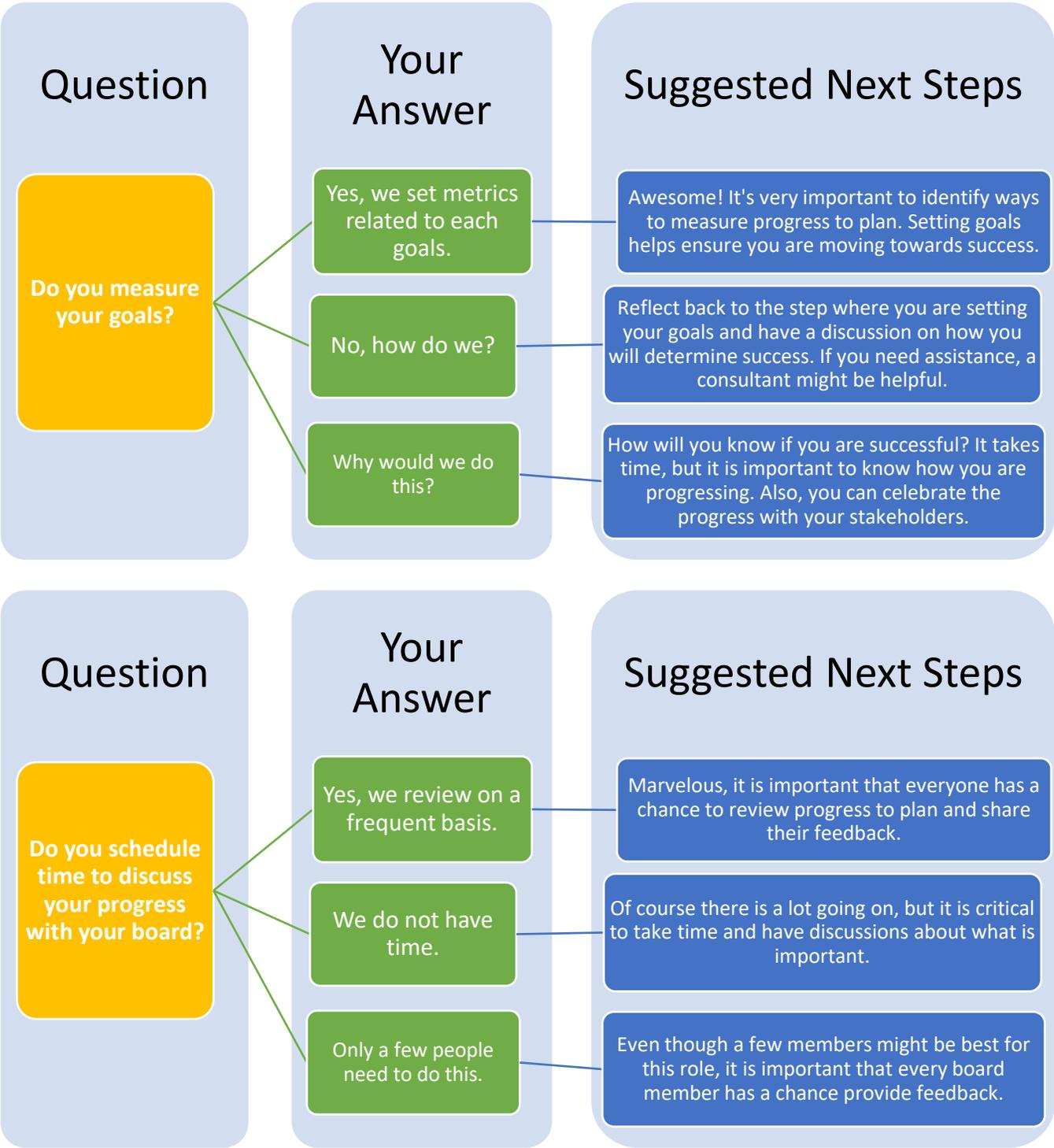


XIII. Onboarding

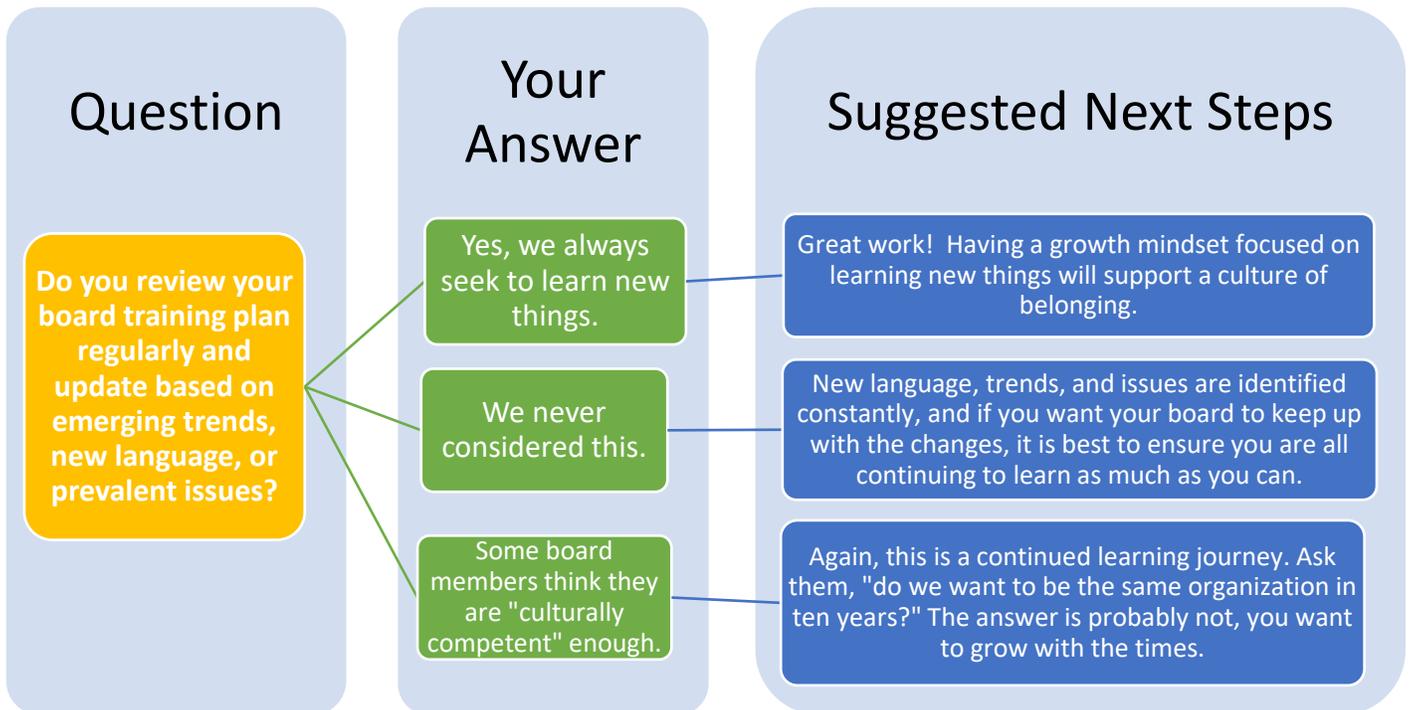
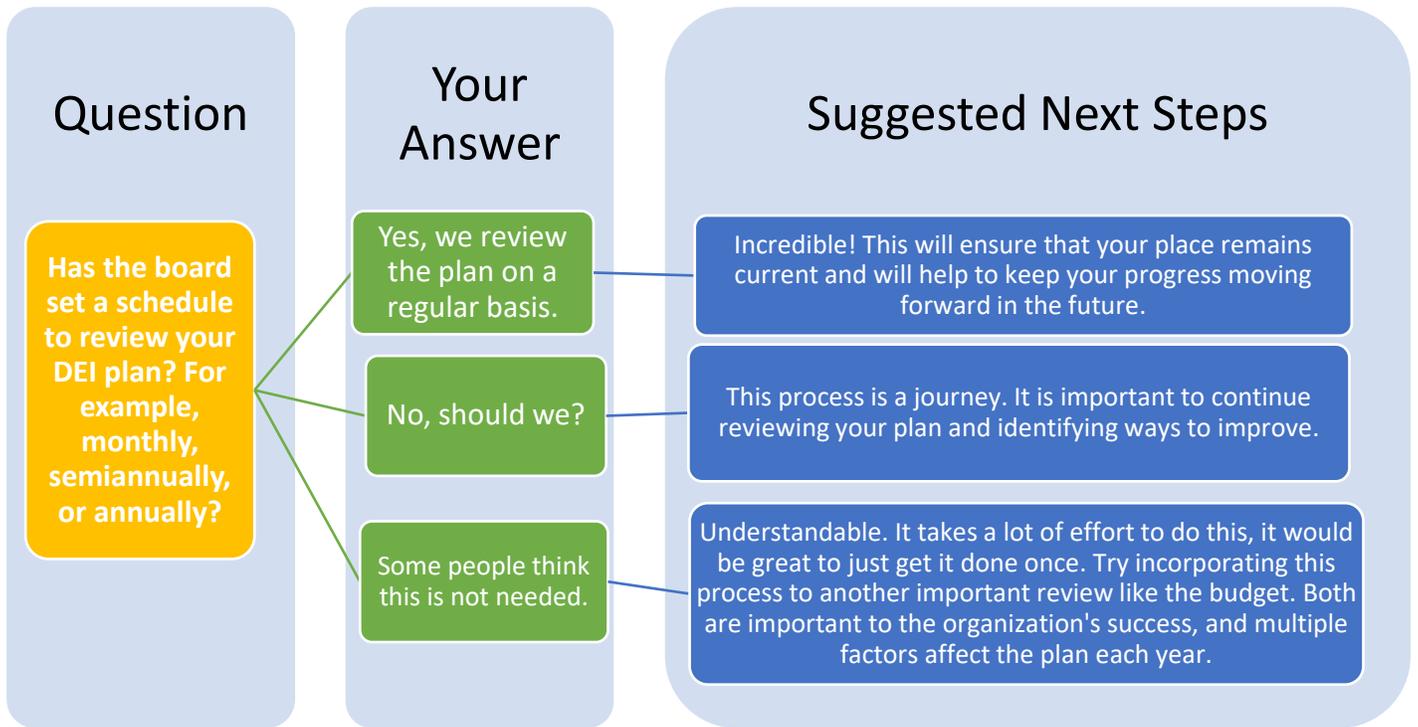


¹⁵ Check out the sample onboarding checklist on page 65.

XIV. Monitoring Progress



XV. Keeping the Progress Moving



TOOLS

“A Framework for Considering Your Organization’s Equity Journey”

By Cora Daniels , Bridgespan

Oftentimes phrases such as “racial equity journey” and “doing the work” are paired together in conversations devoted to issues of equity. But what exactly does the journey look like? What do people mean by “doing the work”?

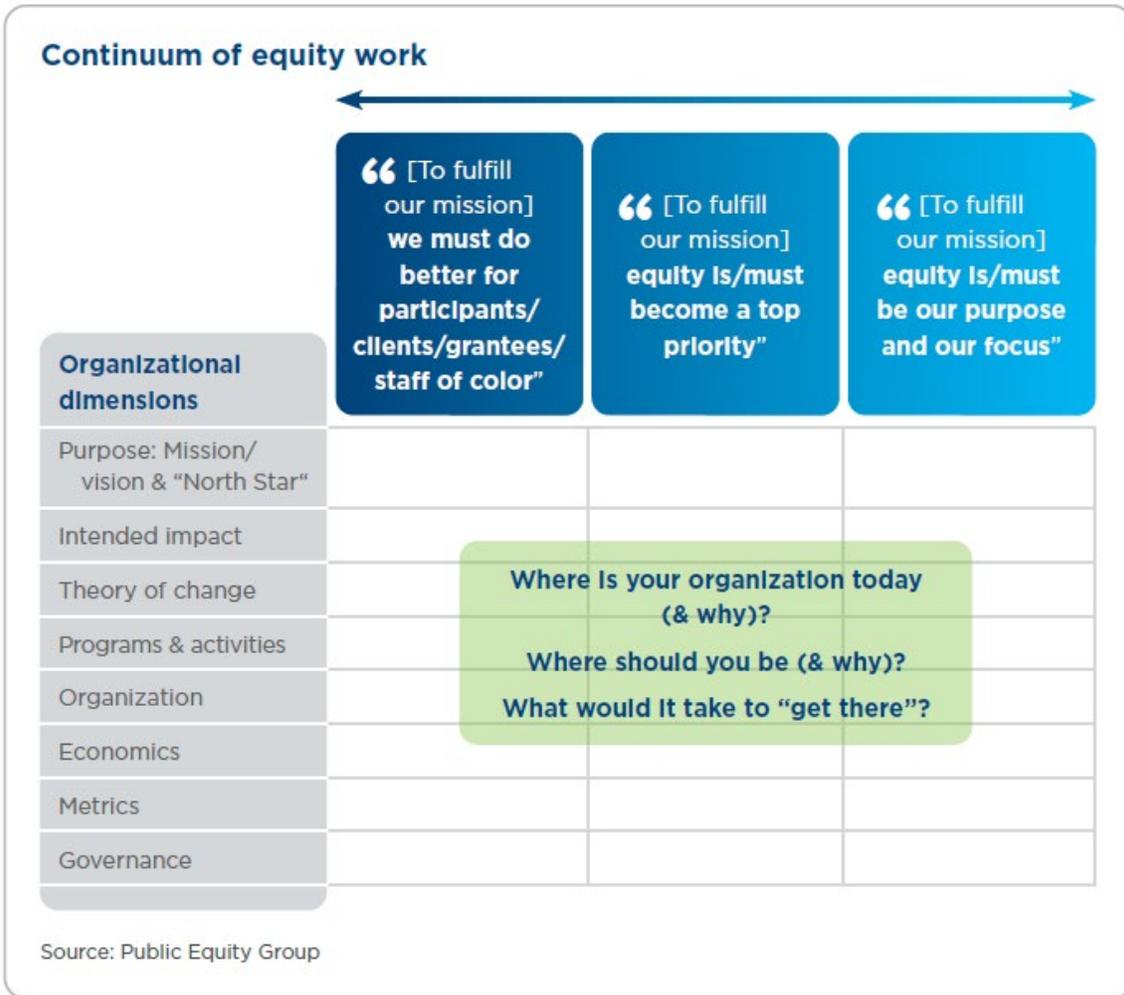
To help answer those questions, Public Equity Group (PEG), a strategy and management consultant firm that helps mission-driven organizations achieve impact in service of equity, would like organizations to start thinking about their equity work and journey along a continuum. PEG’s John Newsome and Rita Louh, both Bridgespan alumni, have been leading that effort.

“A continuum, and its lack of defined start and end points, implies the journey is not entirely linear. Instead, there are shifts, and there is potential to move backwards and forwards,” says Newsome. “A continuum also attempts to be intentional and somewhat nonjudgmental about the journey. Deep change is hard for most organizations, and requires both urgency and self-compassion.”

Drawing from a decade of client work, PEG’s Equity Continuum is a framework to help organizations map and plan a unique equity journey. The continuum identifies different stages along the journey:

- To fulfill our mission, we must do better for participants/clients/grantees/staff of color,
- To fulfill our mission, equity is (or must become) a top priority, and
- To fulfill our mission, equity is (or must become) our purpose and our focus.

In addition, the framework considers multiple organizational dimensions within those stages. PEG suggests that moving through an equity journey means considering—sometimes at different times or to different depths—how equity is addressed within each of these organizational dimensions.



By viewing the equity journey through stages and dimensions, the framework’s breakthrough is the recognition that an organization may not be in the same stage for each dimension. For instance, a youth development organization may have internalized that students of color deserve greater programmatic focus and attention, given data about persistent underinvestment and disparities, even though the organization’s “governors” (e.g., board members/trustees) may not yet view equity as a top organizational priority.

“The process of figuring out where your organization is on each dimension is an important part of the work, as is moving the organization where you want it to be. A framework can help an organization to reflect and set goals, but it is not a recipe,” says Louh. (Bridgespan has used PEG’s Equity Continuum in our organization’s internal racial equity work.)

When thinking about an organization’s equity journey as a continuum, there are two principles to keep in mind:

- **There’s no universal destination, or “right” starting point:** While PEG believes every organization should consider how it can best advance racial equity, it does not think every organization must become “equity focused.” Thus, the continuum is not meant to be seen as a journey from left to right. Instead, part of the work for an organization is to have the internal conversations about the rows and the columns to think about where the organization is now, where it wants to be, and what is required to get there. Likewise, some in the field have argued that an organization’s equity journey should begin with deep, internal reflection, or board engagement, while others have argued that an equity journey should begin with deep community listening and engagement. PEG thinks either is great. “Just start wherever you think you can generate productive leader, staff, and/or community energy and make some progress”.
- **The journey is holistic and iterative:** “Like any comprehensive change process, the equity journey consists of successes, failures, and lessons learned, followed by more progress,” says Newsome. The continuum is intended to be used repeatedly over time so that organizations can continue to reflect on their shifts and progress as a whole, and on each strategic and operational dimension. A key consideration during ongoing internal reflection is becoming aware of alignment, or misalignment, within and across organizational dimensions and the organization as a whole.

After an initial appraisal of the organization’s commitment level—(“Is equity one of our priorities? Is equity a high priority? Is equity our “North Star”?)—the next step requires an honest look at each strategic and organizational dimension to determine the extent of the organization’s current equity focus. An organization should expect to find that it will not be at the same “stage” for every dimension. Resolving the friction that comes from too much misalignment is part of the work of the organization’s equity journey. That process is not easy. Louh reminds leaders that “equity is a change journey for the organization and the individuals involved.”

Cora Daniels is an editorial director working in Bridgespan’s New York office.

SAMPLE BOARD DIVERSITY, EQUITY, AND INCLUSION ACTION PLAN

Implementing Diversity, Equity, and Inclusion initiatives requires short-term and long-term strategies. In order to effectively implement a successful initiative, it may be helpful to create a plan that includes: steps you can take immediately (in next 3 months); in the next 6-12 months and longer-term – over next 2-3 years. An initial commitment of three years seems reasonable. Below is a Sample DEI Action Plan that can be modified to suit your journey.

Building DEI Foundation Through Education and Leadership

Establish the board’s commitment to Diversity, Equity, and Inclusion with a focus on board diversity that is reflective of the community the organization serves.	
Strategies: Understand DEI terminology and pertinent issues facing diverse and marginalized communities. Commit to an ongoing education and awareness program that engages all members of the board in the conversations. Address issues such as implicit bias, systemic racism, impact on marginalized communities.	
Lead: Board President/chair, CEO, and others to be determined.	
Timeframe:	
How will we define success?	

Assessing Board Structure/Composition

Assess current board structure and practices that limit inclusion. Determine the need to establish a board committee focused on DEI initiative. Does the board need a DEI statement? Have a facilitated discussion about bias, privilege, and the impact on the composition of the board.	
Lead: Board Chair	
Timeframe:	
How will we define success?	
Conduct a board assessment with a diversity lens. What are the gaps in the board’s dimensions of diversity (i.e., race/ethnicity, gender, geographic representation, educational background, etc.)? (See “Dimensions in Diversity” Wheel).	
Ask the CEO/ED to provide information on staff diversity for all levels of the organization (e.g., entry level, middle management, senior and executive leadership, if applicable and administrative v. professional staff).	
Timeframe:	
Lead: Board chair, CEO	
How will we define success?	
Define what the board wants to see in terms of greater diversity? How will this mirror staff and leadership diversity?	

Timeframe:	
Lead: All	
How will we define success?	
Does the board have inclusive policies and practices? For example, what are the board’s expectations regarding individual giving by board members? Is giving described in terms of monetary expectations? Is this clearly explained to potential board members? Is everyone required to give at the same levels? Or is everyone required to give something that is comfortable financially for each member?	
How does the board want to assess its policies? On what basis will it make changes?	
Timeframe:	
Lead: Governance and/or DEI Committee	
How do we define success?	
Are board meetings and committee meetings scheduled at times that are conducive to inclusion? When and where does the board meet? Are the meeting locations physically accessible? Can the locations be easily reached by public transportation? If not, is this a potential barrier to participation?	
Do all meetings require in-person attendance? Can participation virtually or by phone be an option?	
Take time to review other past practices that have become routine but may need to be changed to attract individuals from diverse backgrounds.	
Timeframe:	
Lead:	
How do we define success?	

Recruitment

Map out the board turnover schedule over the next 2-3 years. Determine the terms that are ending and what opportunities there are to fill these board vacancies.	
Timeframe:	
Lead: Nomination Committee, All	
How do we define success?	
Based on the board assessment, what skills are you looking for? Determine what new sources of recruitment you will approach to fill the board seat(s). Think creatively. It’s a good time to try a more expansive approach. What relationships have you built in the community with key leaders and organizations? What groups are you seeking to further engage in a long-term partnership? Who are the up-and-coming leaders who represent more diverse communities? Take the long view.	

Are you sharing information about your mission and vision broadly? Are you engaging the population you serve so that they know you also look to them and their guidance, experiences regarding service delivery?	
Attached is a list on page 70 of some of these organizations that should be aware of your interest in bringing more talent and diverse perspectives to your board.	
Lead: Nomination Committee in concert with DEI Committee (if established)	
Timeframe: Relationship building is ongoing; all board members can play a role especially if they are aware of what skill sets are needed (info determined from board assessment)	
Tip: This may be a new approach for several members of the board, as you may be trying this for the first time. The goal is to cast the net widely and reached groups/individuals who may not have been reached before.	

Think about how you have recruited in the past? Does this result in a slate of candidates from diverse backgrounds? What can you do differently? Is a diverse group attending your events/activities/fundraisers? Are these events opportunities to attract future board members who support your mission?	
Tap into potential community partners, membership organizations and professional associations.	
Tip: Work continually to expand your network. Are there activities, programs, events that you can attend to represent the organization in the community.	
Timeframe: Ongoing	
Lead:	
How do we define success?	

Strategic Planning

Take a look at the organization’s strategic plan. Is it time to update the plan to ensure that diversity, equity, and inclusion are woven throughout all aspects of the nonprofit’s work? If the plan has not been updated in the past three years, now may be a good time to do so. The nation is becoming more diverse. It is estimated by 2055, that there will no longer be a single majority race.	
Tip: Given the importance of DEI, it is crucial for organizations to be intentional about having representation in planning, governing and financial priorities.	
Timeframe: TBD	
Lead:	
How do we define success?	

Take stock of your progress. Celebrate your successes to moving your organization forward in achieving greater Diversity, Equity, and Inclusion.

PERSONAL PRIVILEGE PROFILE

Instructions

1. In the *Dimensions of Diversity*¹ column, add any additional dimensions that are important to your identity.
2. In the *My Identity* column, list the description of your identity on each Dimension of Diversity.
3. In the *Power Dynamics* column, identify how U.S. society generally views your identity on each dimension. If your identity group is advantaged/benefits from unearned privilege², that is an agent/dominant/up identity group. If your identity group experiences discrimination/oppresion, that is a target/non-dominant/down identity group. Note that identifying an aspect of your identity as target/non-dominant/down does not mean that it is “less than” in any way, only that our society creates challenges for people who share that identity.
4. In the last column, identify some of the specific unearned privileges that accompany your agent/dominant/up identities and some of the challenges that accompany your target/non-dominant/down identities (if you need some help thinking about privileges, [review Peggy McIntosh’s “Unpacking the Knapsack” for examples of white privilege](#)).

Examples

Dimension of Diversity	My Identity	Power Dynamics	If you’re “dominant,” list a few privileges that come with that identity. If you’re “non-dominant,” list a few challenges that come with that identity.
Physical functioning	Able bodied	<input checked="" type="checkbox"/> Dominant/Agent/Up <input type="checkbox"/> Non-dominant/Target/Down	<ul style="list-style-type: none"> • Can go anywhere without considering physical barriers; do not have to plan/call ahead to be sure I’ll be able to get into a building or access a restroom; do not have to miss events or ask for meetings to be moved because of accessibility concerns • Do not have to negotiate with my employer about the definition of reasonable accommodations to do my work and who will pay for them
Gender	Woman	<input type="checkbox"/> Dominant/Agent/Up <input checked="" type="checkbox"/> Non-dominant/Target/Down	<ul style="list-style-type: none"> • Challenges: Fighting stereotypes such as being too emotional or certain roles should go to women, such as the Secretary • Sexual harassment • Privilege: As a cis woman, knowing my privilege of navigating spaces without stigma or not having my gender identity questioned like trans women.

¹Dimensions of Diversity: Aspects of identity based on group membership, such as race, class, ethnicity, sexual orientation, gender, or physical functioning. These aspects of identity may or may not be visible or obvious to others. Membership in some groups result from birth. Others result from circumstances or experiences that you have little or no control over. Still other groups may be a matter of choice

²Unearned privilege: Systematic advantage that is granted based on race, gender, socioeconomic status, sexual orientation, or other dimensions of diversity, regardless of individuals’ personal characteristics or efforts. This creates dominant/up/agent and non-dominant/down/target groups in a society. These advantages are real and exist whether or not a person from a privileged group makes a conscious, deliberate choice to seek or act on the privileges or whether the person is even aware that s/he benefits from such systematic, structural advantages.

Dimension of Diversity	My Identity	Power Dynamics	If you're "dominant," list a few privileges that come with that identity. If you're "non-dominant," list a few challenges that come with that identity.
Gender		___ Dominant/Agent/Up ___ Non-dominant /Target/Down	
Race		___ Dominant/Agent/Up ___ Non-dominant /Target/Down	
Ethnicity		___ Dominant/Agent/Up ___ Non-dominant /Target/Down	
Socioeconomic Background		___ Dominant/Agent/Up ___ Non-dominant /Target/Down	
Current Socioeconomic Status		___ Dominant/Agent/Up ___ Non-dominant /Target/Down	
Age		___ Dominant/Agent/Up ___ Non-dominant /Target/Down	
Religion/ Spirituality		___ Dominant/Agent/Up ___ Non-dominant/Target/Down	

Dimension of Diversity	My Identity	Power Dynamics	If you're "dominant," list a few privileges that come with that identity. If you're "non-dominant," list a few challenges that come with that identity.
Sexual Orientation		___ Dominant/Agent/Up ___ Non-dominant/Target/Down	
Gender Identity		___ Dominant/Agent/Up ___ Non-dominant/Target/Down	
Physical Functioning		___ Dominant/Agent/Up ___ Non-dominant/Target/Down	
Language		___ Dominant/Agent/Up ___ Non-dominant/Target/Down	
Geography/ Region ³		___ Dominant/Agent/Up ___ Non-dominant/Target/Down	
Job Status ⁴		___ Dominant/Agent/Up ___ Non-dominant/Target/Down	

³E.g., urban/rural/suburban; region of the country, etc.

⁴E.g., white/Blue collar; professional/administrative/technical/clinical; management/labor, etc.

Dimension of Diversity	My Identity	Power Dynamics	If you're "dominant," list a few privileges that come with that identity. If you're "non-dominant," list a few challenges that come with that identity.
Marital Status		___ Dominant/Agent/Up ___ Non-dominant/Target/Down	
Country Of Origin		___ Dominant/Agent/Up ___ Non-dominant/Target/Down	
Education		___ Dominant/Agent/Up ___ Non-dominant/Target/Down	
		___ Dominant/Agent/Up ___ Non-dominant/Target/Down	
		___ Dominant/Agent/Up ___ Non-dominant/Target/Down	

BOARD PRE-ASSESSMENT TOOL

Here is an assessment tool you can use with your board before starting further DEI work.

Logo

Board of Directors’ Assessment

Considerations	5 Strongly Agree	4 Agree	3 Unsure	2 Disagree	1 Strongly Disagree
1. Board has a full and a common understanding of the roles and responsibilities of the board.					
2. Board members understand the organization’s mission, vision, and services/ programs.					
3. Structural pattern (board, officers, committees, executives and staff) is clear, delineated in bylaws, and followed by board.					
4. There are an adequate number of well-functioning board committees and other work groups.					
5. Board members actively participate in strategic planning and ongoing strategic thinking.					
6. The board has adopted, and uses, explicit measures of progress toward identified outcomes.					
7. Board attends to policy-related decisions which effectively guide operational activities of staff.					

<p>8. Board receives regular reports on finances/budgets, service/program performance and other important matters.</p>					
<p>9. Board helps set fundraising goals and is actively involved in some aspect of fundraising.</p>					
<p>10. All board members make a personal financial contribution to organization.</p>					
<p>11. Board effectively represents the organization to the community (i.e. has an “elevator speech.”)</p>					
<p>12. Board meetings facilitate focus and progress on important organizational matters with reporting kept to a minimum.</p>					
<p>13. Board meetings are adequate in length and held at the right time of the day.</p>					
<p>14. Board regularly evaluates and develops yearly goals with the chief executive.</p>					
<p>15. The board reviews the compensation of the Executive Director based on industry standards.</p>					
<p>16. Board has approved comprehensive personnel policies which have been reviewed by a qualified professional.</p>					
<p>17. All necessary skills, stakeholders and diversity are represented on the board.</p>					
<p>18. Board culture encourages and welcomes open discussion, even when members disagree.</p>					
<p>19. Board has an emergency succession plan for executive.</p>					

Considerations	5 Strongly Agree	4 Agree	3 Unsure	2 Disagree	1 Strongly Disagree
20. Board is attentive to building leadership capacity on both board and staff.					
21. Board regularly assesses itself as a whole and also board member participation individually.					
22. Board has a packet of materials for new board members and an orientation process for them.					
23. Board has a board agreement, a whistleblower policy and a conflict of interest policy that all board members must sign and follow.					
24. A strategic process is in place for developing the board.					
25. The board regularly monitors financial performance and projections.					
26. Board members are sufficiently knowledgeable to ask meaningful questions about finances and financial management.					
27. The board reviews the audit report and has an opportunity to ask questions of the auditor at an exit conference.					
28. The board reviews the 990 before filing.					
29. Board discussions focus on the organization's future NOT its past.					
30. Each member of the board feels involved and interested in the board's work.					

What specifically would help to make you a more engaged board member?

Please list the three to five issues on which you believe the board should focus its attention in the next year. Be as specific as possible in identifying these points.

- 1.
- 2.
- 3.
- 4.
- 5.

In ten years, what do you believe is the single most important impact that this organization should have on the community it serves?

Logo

BOARD DEVELOPMENT PRE-ASSESSMENT

Would your board benefit from board training? Are some of the board members unsure of their role? Do some board members seem disengaged? To help you assess your need for board development, here is a pre-assessment. Answer each question as either *True* or *False*

- | | | |
|-------------|--------------|--|
| True | False | 1. Everyone on the board has a full understanding of their roles and responsibilities. |
| True | False | 2. Structural pattern (board, officers, committees, executives and staff) is clear, delineated in bylaws, and followed by board. |
| True | False | 3. The board operates from a set of annual goals and objectives which are reviewed regularly. |
| True | False | 4. Everyone on the board has a working knowledge of the annual budget. |
| True | False | 5. The board regularly evaluates and develops yearly goals with the chief executive. |
| True | False | 6. All necessary skills, stakeholders and diversity are represented on the board. |
| True | False | 7. The board has an emergency succession plan for the executive. |
| True | False | 8. The board discussions focus on the organization's future NOT its past. |
| True | False | 9. A formal plan to cultivate and integrate new board members is in place. |
| True | False | 10. Board members actively participate in strategic planning and ongoing strategic thinking. |

TOTAL SCORE: True _____ False _____

SAMPLE DIVERSITY STATEMENTS



United Way's Commitment to Diversity, Equity & Inclusion

United Way of the Greater Capital Region (UWGCR) is committed to embracing and advancing diversity, equity, and inclusive excellence. As an organization and community partner, UWGCR seeks to work collaboratively with members of ethnically/racially minoritized, international, LGBTQIA+, and disability communities as well as diverse gender identities, socioeconomic backgrounds, religions, and political beliefs, to create equitable and inclusive spaces and opportunities through intentional and impactful practices. We achieve this goal by addressing and combating systemic, institutional, and historical barriers. Collectively, we acknowledge that diversity, equity, and inclusion can only be achieved when we recognize, create space, and listen attentively to individuals from historically victimized groups as equal partners. Additionally, we strive to develop and implement policies and systems grounded in antiracism. To this end, we commit to intentionally creating pathways for individuals of historically minoritized groups to be included in leadership, planning, and decision-making roles, including business opportunities with UWGCR, and partnering institutions. We maintain that building, strengthening, and sustaining diversity, equity, and inclusion in our community and society requires an ongoing commitment that is fully expressed and supported in organizational culture, values, norms, policies, practices, and behaviors.

United Way's Equity Definition

“Equity is an approach that ensures everyone has access to the same opportunities. Equity recognizes that advantages and barriers exist, and that, as a result, we do not all start from the same place. Equity is a process that begins by acknowledging unequal starting places and continues to correct and address the imbalance which leads to justice.”

Meg Bolger, [What's the Difference Between Diversity, Inclusion, and Equity?](https://generalassemb.ly)
(generalassemb.ly)

United Way Worldwide's Statement of Principle

We take the broadest possible view of diversity.

We value the visible and invisible qualities that make you who you are.

We welcome that every person brings a unique perspective and experience to advance our mission and progress our fight for the health, education, and financial stability of every person in every community.

We believe that each United Way community member, donor, volunteer, advocate, and employee must have equal access to solving community problems.

We strive to include diversity, equity, and inclusion practices at the center of our daily work.

We commit to using these practices for our business and our communities.

Join us in embracing diversity, equity, and inclusion for every person in every community.

United Way Worldwide's Vision for Equity

We recognize structural racism and other forms of oppression have contributed to persistent disparities which United Way seeks to dismantle. Our United Way network strives to engage community members, especially those whose voices have traditionally been marginalized. We identify leaders in communities and work with residents and public and private partners to co-create solutions that ensure everyone has the resources, supports, opportunities, and networks they need to thrive. We commit to leveraging all of our assets (convening, strategic investments, awareness building, advocacy) to create more equitable communities.



DIVERSITY AND INCLUSION

United Way fights for the health, education, and financial stability of every person in every community.

We know the work of Diversity, Equity, and Inclusion is unique to every United Way community around the world. Below is United Way Worldwide's Diversity, Equity & Inclusion Statement of Principle which outlines our commitment to building sustainable, inclusive, and resilient organizations and communities.

DIVERSITY, EQUITY & INCLUSION STATEMENT OF PRINCIPLE

We take the broadest possible view of diversity.

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Join us in embracing diversity, equity, and inclusion for every person in every community.

Accessed at <https://www.unitedway.org/about/diversity-and-inclusion#>.



Statement of Cultural Equity

To support a full creative life for all, Americans for the Arts commits to championing policies and practices of cultural equity that empower a just, inclusive, equitable nation. empower a just, inclusive, equitable nation.

DEFINITION OF CULTURAL EQUITY

Cultural equity embodies the values, policies, and practices that ensure that all people—including but not limited to those who have been historically underrepresented based on race/ethnicity, age, disability, sexual orientation, gender, gender identity, socioeconomic status, geography, citizenship status, or religion—are represented in the development of arts policy; the support of artists; the nurturing of accessible, thriving venues for expression; and the fair distribution of programmatic, financial, and informational resources.

ACKNOWLEDGEMENTS & AFFIRMATIONS

- In the United States, there are systems of power that grant privilege and access unequally such that inequity and injustice result, and that must be continuously addressed and changed.
- Cultural equity is critical to the long-term viability of the arts sector.
- We must all hold ourselves accountable, because acknowledging and challenging our inequities and working in partnership is how we will make change happen.
- Everyone deserves equal access to a full, vibrant creative life, which is essential to a healthy and democratic society.
- The prominent presence of artists challenges inequities and encourages alternatives.

MODELING THROUGH ACTION

To provide informed, authentic leadership for cultural equity, we strive to...

- **Pursue cultural consciousness throughout our organization** through substantive learning and formal, transparent policies.
- **Acknowledge and dismantle any inequities** within our policies, systems, programs, and services, and report organization progress.
- **Commit time and resources to expand more diverse leadership** within our board, staff, and advisory bodies.

FUELING FIELD PROGRESS

To pursue needed systemic change related to equity, we strive to...

- **Encourage substantive learning to build cultural consciousness** and to proliferate pro-equity policies and practices by all of our constituencies and audiences.
- **Improve the cultural leadership pipeline** by creating and supporting programs and policies that foster leadership that reflects the full breadth of American society.
- **Generate and aggregate quantitative and qualitative research related to equity** to make incremental, measurable progress toward cultural equity more visible.
- **Advocate for public and private-sector policy** that promotes cultural equity.

Accessed at https://www.americansforthearts.org/sites/default/files/pdf/2016/about/cultural_equity/ARTS_CulturalEquity_updated.pdf.



**ALL STARS HELPING KIDS DIVERSITY STATEMENT
EQUITY STATEMENT FOR WEBSITE:**

We are committed to maintaining a professional working environment that recognizes, understands, respects, and encourages the unique contributions of each intern, employee, donor, grantee, and partner. We cannot grow effective leaders if we do not include the voices of everyone in inclusive and equitable ways.

LONGER VERSION:

All Stars Helping Kids promotes diversity, inclusion, equity, access and mutual respect among staff, community partners, donors, the nonprofits we support, and the communities we serve. We are dedicated to creating a more diverse, representative, and inclusive community grounded in respect, humility, celebration and appreciation. All Stars Helping Kids endorses a broad definition of diversity and seeks to create dialogue that encourages an understanding of diversity, inclusion and capacity in the nonprofits and communities we serve. The All Stars Helping Kids leadership team works to meet the needs of all its internal and external constituencies. They work toward cultural competency and understanding for our grantees by surfacing equity issues and facilitating open, honest dialogue.

- **Diversity** means understanding that each individual is unique and recognizing our individual differences, ideas, and experiences in philanthropic grantmaking. These can be along the dimensions of race, ethnicity, gender, sexual orientation, socio-economic status, age, physical abilities, religious beliefs, political beliefs, or other ideologies.
- **Inclusion** is the exploration of differences in a safe, positive, and nurturing environment personally and professionally. It is about understanding each other and moving beyond simple tolerance to embracing and celebrating the rich dimensions of diversity within each individual. It is the profound practice of making sure all have a seat at the table.
- **Equity** is the movement toward more justice and fairness in organizational and societal practices. Seed funding under-resourced organizations serving marginalized communities, promoting fair pay for equal work, providing access to educational, health and wellness, and leadership opportunities for all and ending discrimination supports the development of equity within our communities.
- **Access** is the concept that all people have equal chances at advancement, learning, participation, and leadership in organizations. The systematic discrimination that exists in society necessitates the conscious questioning of whom is present and heard in decision- making, leadership and organizations.

All Stars Helping Kids is a 501(c)(3) organization. Fed Tax I.D. # 77-0325111

Accessed at <https://www.allstarshelpingkids.org/wp-content/uploads/2020/08/All-Stars-Diversity-Statement.pdf>.



Diversity Statement:

The Capital Region Chamber believes that full potential is realized when diversity, equity and inclusion are the standards upon which we strengthen and impact our businesses and communities. As an advocate for regional businesses, the Chamber – through its leadership, actions, educational programming and community collaboration – is committed to cultivating inclusive economic opportunity for all who call our region home.

Your Capital Region Chamber achieves this by:

- Creating an environment that engages diverse individuals and perspectives through intentional inclusion
- Seeking out, implementing and promoting best practices
- Cultivating a more diverse and inclusive membership, board and workforce
- Educating businesses on creating a more diverse and inclusive culture, workforce and community
- Advocating for policies and initiatives that eliminate barriers to equitable opportunity

The Capital Region Chamber welcomes the unique perspectives and contributions of all people. We value and respect diversity in terms of individuals' education, opinions, culture, ethnicity, race, sex, gender identity and expression, nation of origin, age, languages spoken, veteran's status, color, religion, disability, sexual orientation, citizenship/immigration status and beliefs.

SAMPLE SURVEY OF STAKEHOLDER PERSPECTIVES

Thank you for agreeing to complete this short survey on the inclusiveness practices of _____ (name of organization). We seek to become more inclusive of communities of color. Your participation in this survey will influence our efforts. Your responses will be confidential. When you have finished the survey, please return it to: *(Determine Contact Name and Method)*

Your position with _____ (name the organization).

Check the term that best describes your primary role with the organization.:

- Staff
- Board
- Donor
- Former Board Member
- Former Staff Member
- Volunteer
- Client
- Community Partner (working closely with the organization)
- Community Leader
- Community Member

Your Race/Ethnicity

- African American
- Asian/Pacific Islander
- Latinx/Chicanx/Hispanic
- Middle Eastern
- Mixed Racial/Ethnic Background
- South Asian
- Other _____
- White/Caucasian

Your Additional Identities

- LGBTQIA++
- Immigrant or Foreign-Born Citizen
- Person with a Disability
- Other _____

Please answer the questions below using the following scale and/or with a written answer:

- 1 = not at all
- 2 = a little bit
- 3 = somewhat
- 4 = quite a lot
- 5 = a great deal
- dk = don't know

For the purposes of this survey, **inclusiveness** is defined as...

Organizational Mission

The mission of _____ (name of organization) is... *(Fill this in ahead of time so that respondents can reflect on the actual mission.)*

(1) Does the mission of _____ impact communities of color? 1 2 3 4 5 dk

(2) Do you feel that communities of color generally respond positively to _____'s mission?
1 2 3 4 5 dk

(3) Are the values related to inclusiveness that are espoused by _____ consistent with the values that it practices? 1 2 3 4 5 dk

(4) Do you have any suggestions about how _____'s mission statement could be changed to expand inclusiveness?

(5) Please provide further comments related to mission-related issues here:

Board of Directors

(1) Do you feel people of color generally feel comfortable serving as members of the board of directors of _____?
1 2 3 4 5 dk

(2) Do people of color and white people generally serve as directors for the same amount of time?
1 2 3 4 5 dk

(3) Does the board of directors of _____ consider issues relating to race and ethnicity when it sets policies and makes decisions for the organization? 1 2 3 4 5 dk

(4) What could the board of directors of _____ do differently to become more inclusive, if anything?

(5) What could the board of directors of _____ do differently to address the needs of communities of color, if anything?

6. Please provide further explanation on any governance-related issues here:

Personnel

(1) Are people of color and white people with similar professional backgrounds and skills recruited and promoted equally at _____? 1 2 3 4 5 dk

(2) Has _____ been able to effectively retain people of color? 1 2 3 4 5 dk

(3) Are staff at certain levels of the organization more likely to be people of color than at other levels?
1 2 3 4 5 dk

(4) What factors have influenced retention among people of color at _____?

(5) What could _____ do, if anything, to recruit and retain staff members of color at all levels?

(6) Please provide further explanation on any personnel-related issues here:

Programs

(1) Does _____ specifically consider race/ethnicity and/or culture in designing and implementing programs?
1 2 3 4 5 dk

(2) Does _____ make services available in geographic locations that are convenient and accessible to communities of color? 1 2 3 4 5 dk

(3) Does _____ translate materials into languages that are spoken by communities of color in its service area?
1 2 3 4 5 dk

(4) Is there anything that _____ does to hinder providing services to people of color? Please explain.

(5) Please provide further explanation of any program-related issues here:

This worksheet was created by The Denver Foundation's Inclusiveness Project (www.nonprofitinclusiveness.org) to support organizations doing inclusiveness work.

Users are encouraged to customize the worksheet (both content and formatting) to meet the needs of their respective organizations.

SAMPLE BOARD OF DIRECTOR'S CANDIDATE APPLICATION

Section 1: Your Contact and Demographic Information

Name: _____

Pronouns: _____ Birth Year: _____

Current address: _____

Email: _____

Phone: _____

Race & Ethnicity: _____

Gender: _____

Sexual Identity: _____

Do you identify having a disability? If yes, please share if comfortable: _____

Were you born in the United States or another country? If another country, what country?

Gender Identity:

Cisgender Transgender Gender Nonbinary Other: _____

Section 2: Your Background Information

Current employment status:

Full Time Part Time Seeking Employment

Retired Other: _____

Employer Name (if employed): _____

Years with current employer: _____ Years in current field: _____

Current occupation: _____

What is your professional background:

What other volunteer positions have you held?

Please list your any formal or nontraditional education you have completed:

Please list any lived experience that you believe would provide valuable insights for our board:

Section 3: Mission Alignment

In what ways have you interacted with our organization before applying for the board (examples: committee member, client, donor, event attendee, etc.)?

Why is our mission important to you?

Why do you want to be on our board?

Section 4: Governance

If you have served on a board before, please provide the name, dates of service and reason for leaving for the three most recent board positions:

1. _____
2. _____
3. _____

SAMPLE ONBOARDING CHECKLIST

Welcome to the board of directors for XYZ Organization. In an effort to prepare you for your board role, please see this onboarding checklist. Please complete the activities on the checklist within your first six months of being on the board. Your board buddy will support you during this onboarding. After completing it, please return to the Governance Chair.

Programs

- Attend and observe a program.
- Schedule a 30-minute phone call with a program staff member to learn about their role and perspective of the program.
- Review the agency website and read over all the program information materials.

Organization History and Culture

- Review organization history on the agency website.
- Schedule a meeting with the Executive Director to learn about organizational challenges.
- Meet with your Board Buddy to discuss board culture and informal expectations.
- Attend the new board member mixer and meet all the board members.

Board Member Responsibilities

- Schedule a meeting with the Governance Chair to review Board member responsibilities*
- Meet with Board Chair to review your specific role, the board's strategic direction, and other expectations. *
- Meet with the Secretary to discuss board member meetings, board documentations and expectations. *
- Review board member bylaws.
- Sign and return Board member documents such as job description, conflict of interest and other necessary documents. *

Finances

- Review the latest agency 990.
- Review the latest agency financials.
- Schedule a meeting with the Treasurer to discuss Board member expectations related to financial oversight. *

Fund Development

- Schedule a meeting with the Fundraising Lead to discuss agency fundraising efforts and board member expectations.*
- Create a personal action plan with Fundraising Lead related to fund development efforts for the organization.

**Can be done in an Onboarding Session*

Board member signature

Date

INTERRUPTING BIAS: CALLING OUT VS. CALLING IN

Calling Out:

- When we need to let someone know that their words or actions are unacceptable and will not be tolerated
- When we need to interrupt in order to prevent further harm
- Will likely feel hard and uncomfortable, but necessary
- Allows us to hit the “pause” button and break the momentum

Wow. Nope. Ouch. I need to stop you right there.	That word/comment is really triggering and offensive. Be mindful and pick a different word.	I need to push back against that. I disagree. I don't see it that way.
Okay, I am having a strong reaction to that and I need to let you know why.	I don't find that funny. Tell me why that's funny to you.	I wonder if you've considered the impact of your words.
Hmmm.. maybe you want to think this one through a bit more and speak about it later.	I need you to know how your comment just landed on me.	That's not our culture here. Those aren't our values.
Is sex/gender/gender identity/gender expression/race/class/ethnicity/religion/ability/immigration status/ body type/ marital status/ age/ pregnancy relevant to your point? How?	It sounded like you just said _____. Is that really what you meant?	I feel obligated as your peer/colleague/co-worker /friend/supervisor to tell you that your comment wasn't okay.
It sounds like you're making some assumptions that we need to unpack a bit.	You may or may not realize this, but you're talking about me/my story/my identity markers.	I need to leave the room if the conversation is going to continue down this road.
Remember, it is a powerful thing for the target of oppression to hear these words from the mouth of an ally!		

Adapted from Oregon Center for Educational Equity: *What Did You Just Say? Responses to Racist Comments Collected from the Field*



Calling In:

- When there is an opportunity to explore deeper, make meaning together, and find a mutual sense of understanding across difference
- When we are seeking to understand or learn more
- When we want to help imagine different perspectives, possibilities, or outcomes
- Provides for multiple perspectives and encourages paradigm shifts
- Focused on reflection, not reaction
- Is *not* just a suggestion with an uptick (Don't you think you should...?)

I'm curious. What was your intention when you said that?	How might the impact of your words/actions differ from your intent?	What sort of impact do you think your decision/comment/action might have?
How might someone else see this differently? Is it possible that someone might misinterpret your words/actions?	How might your own comfort level, assumptions, expectations, prior experiences be influencing your beliefs, decisions, process?	How is ___ different from ___? What is the connection between ___ and ___?
What criteria are you using to measure/assess etc?	How did you decide, determine, conclude...	What would have to change in order for ___?
What do you assume to be true about ___?	Why is this the best way to proceed? What other approaches have you considered?	What is making you the most fearful, nervous, uncomfortable or worried?
Why do you think that is the case? Why do you believe that to be true?	Why do you think others have/haven't moved in that direction?	How do you know it's working?
Why did the result or response cause a problem for you?	What would other stakeholders say/think/feel?	In your opinion, what is the best-case scenario?

Think: How might we call out the behavior, while calling in the person?

Adapted from the School Reform Initiative *Pocket Guide to Probing Questions*



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TOOLS: INTERRUPTING MICROAGGRESSIONS

MICROAGGRESSION EXAMPLE AND THEME	THIRD PARTY INTERVENTION EXAMPLE	COMMUNICATION APPROACH
<p>Alien in One’s Own Land To a Latino American: “Where are you from?”</p> <p>Ascription of Intelligence To an Asian person, “You’re all good in math, can you help me with this problem?”</p> <p>Color Blindness “I don’t believe in race.”</p>	<p>“I’m just curious. What makes you ask that?”</p> <p>“I heard you say that all Asians are good in math. What makes you believe that?”</p> <p>“So, what do you believe in? Can you elaborate?”</p>	<p>INQUIRE Ask the speaker to elaborate. This will give you more information about where s/he is coming from, and may also help the speaker to become aware of what s/he is saying.</p> <p>KEY PHRASES: “Say more about that.” “Can you elaborate on your point?” “It sounds like you have a strong opinion about this. Tell me why.” “What is it about this that concerns you the most?”</p>
<p>Myth of Meritocracy “Everyone can succeed in this society, if they work hard enough.”</p> <p>Pathologizing Cultural Values/Communication Styles Asking a Black person: “Why do you have to be so loud/animated? Just calm down.”</p>	<p>“So you feel that everyone can succeed in this society if they work hard enough. Can you give me some examples?”</p> <p>“It appears you were uncomfortable when ____ said that. I’m thinking that there are many styles to express ourselves. How we can honor all styles of expression—can we talk about that?”</p>	<p>PARAPHRASE/REFLECT Reflecting in one’s own words the essence of what the speaker has said. Paraphrasing demonstrates understanding and reduces defensiveness of both you and the speaker. Restate briefly in your own words, rather than simply parroting the speaker. Reflect both content and feeling whenever possible.</p> <p>KEY PHRASES: “So, it sounds like you think…” “You’re saying… You believe…”</p>
<p>Second-Class Citizen You notice that your female colleague is being frequently interrupted during a committee meeting.</p> <p>Pathologizing Cultural Values/Communication Styles To a woman of color: “I would have never guessed that you were a scientist.”</p>	<p>Responder addressing the group: “____ brings up a good point. I didn’t get a chance to hear all of it. Can ____ repeat it?”</p> <p>“I’m wondering what message this is sending her. Do you think you would have said this to a white male?”</p>	<p>REFRAME Create a different way to look at a situation.</p> <p>KEY PHRASES: “What would happen if….” “Could there be another way to look at this…” “Let’s reframe this…” “How would you feel if this happened to your_____.”</p>
<p>Second-Class Citizen Saying “You people….”</p> <p>Use of Heterosexist Language Saying “That’s so gay.”</p>	<p>“I was so upset by that remark that I shut down and couldn’t hear anything else.”</p> <p>“When I hear that remark, I’m offended too, because I feel that it marginalizes an entire group of people that I work with.”</p>	<p>USE IMPACT AND “I” STATEMENTS A clear, nonthreatening way to directly address these issues is to focus on oneself rather than on the person. It communicates the impact of a situation while avoiding blaming or accusing the other and reduces defensiveness.</p> <p>KEY PHRASES: “I felt _____ (feelings) when you said or did _____ (comment or behavior), and it _____ (describe the impact on you).”</p>
<p>Second-Class Citizen A woman who is talked over.</p> <p>Making a racist, sexist or homophobic joke.</p>	<p>She responds: “I would like to participate, but I need you to let me finish my thought.”</p> <p>“I didn’t think this was funny. I would like you to stop.”</p>	<p>USE PREFERENCE STATEMENTS Clearly communicating one’s preferences rather than stating them as demands or having others guess what is needed.</p> <p>KEY PHRASES: “What I’d like is…” “It would be helpful to me if…”</p>

Adapted from Kenney, G. (2014). *Interrupting Microaggressions*, College of the Holy Cross, Diversity Leadership & Education. Accessed on-line, October 2014. Kraybill, R. (2008). “Cooperation Skills,” In Armster, M. and Amstutz, L., (Eds.), *Conflict Transformation and Restorative Justice Manual*, 5th Edition, pp. 116-117. LeBaron, M. (2008). “The Open Question,” In Armster, M. and Amstutz, L., (Eds.), *Conflict Transformation and Restorative Justice Manual*, 5th Edition, pp. 123-124. Peavey, F. (2003). “Strategic Questions as a Tool for Rebellion,” In Brady, M., (Ed.), *The Wisdom of Listening*, Boston: Wisdom Publ., pp. 168-189.

Tool: Interrupting Microaggressions

MICROAGGRESSION EXAMPLE AND THEME	THIRD PARTY INTERVENTION EXAMPLE	COMMUNICATION APPROACH
<p>Color Blindness "When I look at you, I don't see color."</p> <p>Myth of Meritocracy "Of course he'll get tenure, even though he hasn't published much—he's Black!"</p>	<p>"So you don't see color. Tell me more about your perspective. I'd also like to invite others to weigh in."</p> <p>"So you believe that _____ will get tenure just because of his race. Let's open this up to see what others think."</p>	<p>RE-DIRECT Shift the focus to a different person or topic. (Particularly helpful when someone is asked to speak for his/her entire race, cultural group, etc.) KEY PHRASES: "Let's shift the conversation..." "Let's open up this question to others...."</p>
<p>Myth of Meritocracy In a committee meeting: "Gender plays no part in who we hire."</p> <p>"Of course she'll get tenure, even though she hasn't published much—she's Native American!"</p> <p>Second-Class Citizen In class, an instructor tends to call on male students more frequently than female ones.</p>	<p>"How might we examine our implicit bias to ensure that gender plays no part in this and we have a fair process? What do we need to be aware of?"</p> <p>"How does what you just said honor our colleague?"</p> <p>"What impact do you think this has on the class dynamics? What would you need to approach this situation differently next time?"</p>	<p>USE STRATEGIC QUESTIONS It is the skill of asking questions that will make a difference. A strategic question creates motion and options, avoids "why" and "yes or no" answers, is empowering to the receiver, and allows for difficult questions to be considered. Because of these qualities, a strategic question can lead to transformation. Useful in problem-solving, difficult situations, and change efforts. KEY PHRASES: "What would allow you..." "What could you do differently...." "What would happen if you considered the impact on..."</p>
<p>Traditional Gender Role Prejudicing and Stereotyping In the lab, an adviser asks a female student if she is planning to have children while in postdoctoral training.</p>	<p>To the adviser: "I wanted to go back to a question you asked _____ yesterday about her plans for a family. I'm wondering what made you ask that question and what message it might have sent to her."</p> <p>To the student: "I heard what your advisor said to you yesterday. I thought it was inappropriate and I just wanted to check in with you."</p>	<p>REVISIT Even if the moment of a microaggression has passed, go back and address it. Research indicates that an unaddressed microaggression can leave just as much of a negative impact as the microaggression itself. KEY PHRASES: "I want to go back to something that was brought up in our conversation/meeting/class" "Let's rewind ___minutes..."</p>

CONSIDERATIONS:

- The communication approaches are most effective when used in combination with one another, e.g., using impact and preference statements, using inquiry and paraphrasing together, etc.
- Separate the person from the action or behavior. Instead of saying "you're racist", try saying "that could be perceived as a racist remark." Being called a racist puts someone on the defensive and can be considered "fighting words."
- Avoid starting questions with "Why"—it puts people on the defensive. Instead try "how" "what made you"
- When addressing a microaggression, try to avoid using the pronoun "you" too often—it can leave people feeling defensive and blamed. Use "I" statements describing the impact on you instead or refer to the action indirectly, e.g., "when _____ was said..." or "when _____ happened..."
- How you say it is as critical as what you say, e.g., tone of voice, body language, etc. The message has to be conveyed with respect for the other person, even if one is having a strong negative reaction to what's been said. So it is helpful to think about your intention when interrupting a microaggression—e.g., do you want that person to understand the impact of his/her action, or stop his/her behavior, or make the person feel guilty, etc. Your intention and the manner in which you execute your intention make a difference.
- Sometimes humor can defuse a tense situation.

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RESOURCES

Listing of Additional Online Resources

- [Community Foundation for the Greater Capital Region IDEA Resource Hub](#)
- [BoardStrong, New York Council of Nonprofits](#)
- [Nonprofit AF: The Real Reasons Organizations are Still Unable to Diversity their Board, Staff, Fundraising Committees, etc.](#)
- [Nonprofit Inclusiveness](#)
- [Diversity and Inclusion Initiative Step by Step Guide](#)
- [Nonprofit HR Board Diversity](#)
- [Community Centric Fundraising](#)
- [Anti-Racism Daily Newsletter](#)
- [The Curb Cut Effect](#)
- [Stakeholder Engagement Best Practices](#)

List of Organizations to Consider for Diverse Talent

- Albany Black Professionals
- American Marketing Association
- Association of Fundraising Professionals, Hudson-Mohawk Chapter
- Capital District Black and Hispanic Bar Association (CDBHBA)
- Empire State Society of Association Executives
- Greater Capital Association of Realtors Inc.
- National Association of Social Workers - NYS Chapter
- New Leaders Council, Capital District Chapter
- New York Capital Region Hispanic Chamber of Commerce
- New York State Bar Association
- New York State Society of Certified Public Accountants
- Power Breakfast Club
- Public Relations Society of America
- Queer Exchange – Albany (LGBTQIA+)
- The Business Council of New York State Inc.
- Upstate Alliance for Creative Economy
- Upstate New York Black Chamber of Commerce