Bridging the Inclusion Gap:
Creating Transformation in the Workplace
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Abstract

In our increasingly diverse world, there is a great need for the nonprofit sector to step up as leaders and as transformational agents of change. Many nonprofit organizations take a strong stance against injustice, but it is time to do more than just take a stand. Nonprofits need to become more socially just and inclusive organization themselves, so as to create the transformation in the communities around them. Beyond a moral imperative, nonprofits have strong incentives to engage in diversity and inclusion work, as they will become more effective in delivering their missions. Inclusion is the key to transformation, promoting creativity and innovation, and nonprofits can no longer become complacent in simply declaring principles of diversity, but rather become more practically inclusive organizations.

The objectives of this research are three-fold: (1) highlight the problems that diversity measures face in organizations and offer insights into why principles of diversity, without inclusive practices, are useless. (2) Conduct research into the trends and strategies being used by nonprofits that are already engaged in diversity, equity, and inclusion work. (3) Provide an expanded manual, combined from the literature and experts in the field, to help organizations become more inclusive, effective, and transformational.
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Section 1. Introduction

We live in an increasingly diverse world and it’s time for nonprofits to lead the way in transforming the communities around them. Along with the increase in diversity that we are experiencing as a nation, there is also increasing division, fear, and injustice as a result of the current political and power struggles we are facing. As The Washington Post has reported, we live in turbulent times with problems like racism, immigration, and gun violence being at an all time high (Blake, 2017). As a sector, nonprofit organizations are in a unique position to take a strong stand against the injustices around them. Many nonprofits are vocal about their stance against some of our society's greatest injustices. However, taking a stand is not enough. The National Council of Nonprofits, a trusted resource and advocate for American nonprofits since 1990, has been a leader in calling on nonprofits to practice what they preach, especially when it comes to denouncing the persistence of racism, bigotry, and intolerance (Nonprofit Council of Nonprofits, 2018). They are insisting that nonprofits work intentionally to model those values that they are fundamentally against. In speaking about these injustices such as racism, bigotry, and intolerance, the only way to counteract those tendencies is to model behaviors opposite of those. As the National Council of Nonprofits (2018) has expressed, “We believe that embracing race equity, diversity & inclusion as organizational values is a way to intentionally make space for positive outcomes to flourish, whether in the nonprofit capacity building or public policy spheres.” The Council is not just calling on nonprofits to engage in this work, but they are embarking on this work themselves and starting to ask the hard questions about their core values and mission.

There is an urgent need for nonprofits to begin to think about the ways that their organizations are reinforcing or working against these injustices on a systemic and individual level. As the National Council of Nonprofits has pointed out, a lack of inclusivity at an organization is stopping organizations from delivering their mission fully. If there are exclusive and oppressive things affecting an organization, then they can never flourish fully in their communities. We need to transform communities, starting on a micro level, and beginning to critically evaluate our organizations in terms of their ability to incorporate and make space for the many diverse perspectives that exist within it. This transformation is only possible with the help of transformational leaders who are willing to step up and be the champions of this work. It is not a quick fix, but it is a necessary fix as nonprofit organizations have the potential to be agents of change in their communities.

Traditional management leadership styles are known for being very transactional, in which clear objectives and goals are defined and punishments or rewards are used in order to encourage compliance with these goals (Business Dictionary). Unfortunately, that sort of exchange limits innovation and the effectiveness of the work as people are simply used to serve a function or role. Rather, our world is in desperate need of
transformational management styles in which people are energized and inspired in their work environments. When people are treated no longer as functions, but as full persons who are being transformed and inspired, then they become the transformational agent not only in their organization, but also in the world.

The organization itself also becomes a transformational agent in the community and people, no matter what their diverse background may be, are more able to fully bring themselves to their work and to their environments, which means the organization is able to better fulfill its mission as well. There are many documented benefits of energizing a diverse workforce, and in being more inclusive in their participation at work and in their community such as: a more just community and workplace (in which trust is created and built upon), a healthier community and work place (as research continues to show that people are physically and mentally healthier due to their connections with others and feeling valued and included at work), freer communities (in which people are able to express themselves and their opinions), status differences are minimized, people are happier in their jobs (therefore more productive), and more research is showing that people are more creative in their jobs when they are encouraged as transformational agents of change, and not simply functions in a role (Shore et al., 2011, p.1278-­1281).

There does exist research in the fields of organizational development (OD) and diversity literature that beginning to address this work, but neither of these fields is emphasizing enough the importance of inclusion in their organizations. This report serves to fulfill this need and bridge the gaps between the organization development, diversity, transformational leadership, and inclusion literature in order to create an expanded model of inclusion that incorporates models and strategies from all four of these fields. This report is organized in the following way: First, the need for transformational communities (via transformational organizations) will be explained. Second, a literature review will offer an analysis of the existing organizational development, diversity, and transformational leadership literature, and also make the case for why organizations should be focusing more on the recent inclusion literature and research that is being developed. Third, the existing models for diversity, equity and inclusion (DEI) frameworks from all four fields will be reviewed. Fourth, methods, approaches and data analysis will highlight the important themes and approaches to inclusion work that exists within current nonprofit organizations. Lastly, the implications and recommendations section will offer an expanded manual of inclusive practices for all nonprofit organization, no matter their size or field of work, to adopt.

The Need for Transformational Organizations

This literature review begins with the preface that, as mentioned earlier, transformational communities are best achieved through transformational leadership and transformational organizations, as they are more able to fully deliver and live out their missions. Therefore, this review shall touch upon the main themes present in existing
literature in the fields of organizational development, diversity, and transformational leadership literature, and also make the case for why organizations should be focusing more on the recent inclusion literature that is being developed. This is because inclusion literature is shifting toward an emphasis on a multilevel analytical framework, developed by Ferdman B. and Deane B. (2013), in recognizing that organizations that are more transformational in their dynamics and organizational approaches are more likely to fulfill their missions and serve their communities as agents of change.

This analysis begins on an individual level, in which organizations are encouraged to analyze and reflect on the individual inferences and biases within their own organizations. In this transformational work, the best place to begin is with the things that we do have control over, which is the work that goes on within our own organizations. To begin this work, organizations need to take a hard, critical look at the dynamics of their organizations and begin to break down and change the exclusion and biases that are present within it. There exists a huge body of literature, within the fields of organizational development and diversity literature that has recognized the need for inclusive practices. Organizations are only as transformational and energizing as much as they seek to include and inspire all of the diverse people, opinions, and desires that exist already. This understanding is the basis of the developing inclusion literature which builds upon these themes in the OD and diversity literature, and this report seeks to combine all of these fields of research into one manual for organizations to use. Before this expanded manual of inclusive practices can be useful or relevant to any organization, there must first be recognition of a need for it.

BoardSource, a trusted source of information and guidance for nonprofit boards since 1988, envisions a world where every nonprofit organization has the leadership it needs to fulfill its mission and advance the public good (BoardSource, Mission). BoardSource recently published statistics that demonstrates how homogeneous board members are being mostly comprised of white, male demographics (Leading With Intent, 2017). Similar reports (Race to Lead, 2017; Daring to Lead, 2011) have also concluded that the percentage of people of color in executive director/CEO roles has remained under 10% for the past 15 years (Thomas-Breitfield & Kunreuther, 2017). There is a huge disconnect when the leadership of the nonprofit sector is not representative of the racial and ethnic diversity of the people that the organization serves or of the country in which it is operating. Due to this lack of diversity and representation, evidence continues to point to economic inequality and social exclusion in the workplace (Shore, Cleveland, & Sanchez, 2018, p.176). In light of the current disparities in the sector, the best way to achieve transformation is to address the huge gaps in diversity, embrace the present diversity, and to work toward more inclusivity of this diversity.

 Aside from the moral imperative to engage in this work, diversity literature emphasizes the performance advantage to be gained. Hunt, V., Layton, D., and Prince, S.
(2015) found that the companies in the top quartile of gender diversity were 15% more likely to have financial returns that were above their national industry median, and companies in the top quartile of racial/ethnic diversity were 35% more likely to have financial returns above their national industry median (p.1). Overall, their research proved that there is a correlation of relationship between diversity and performance since more diverse companies are better able to "win top talent, improve their customer orientation, employee satisfaction, and decision making, leading to a virtuous cycle of increasing returns" (p.1). We live in an increasingly global world, so it makes sense that we are becoming more deeply interconnected with diverse populations and the more diverse and inclusive companies will thrive and succeed the most.

Section 2: Literature Review

Organizational Development Shares Values with Diversity, Equity, and Inclusion

Bernardo M. Ferdman is an accomplished leadership and Organizational Development Consultant with more than 28 years of experience working with diverse groups and organizations to increase individual and collective effectiveness according to his website. In Ferdman’s (2014) article Toward Infusing Diversity and Inclusion as Core Elements of Organizational Development he argued, “Successful organizations and effective leaders will increasingly be those that are able to incorporate many types of diversity and to foster inclusion. Indeed, many global organizations and those in multicultural societies are incorporating fundamental diversity to their leadership development and workforce engagement processes. To the extent that OD does not address these issues and needs, it will not be prepared to achieve its objectives, and it even runs the risk of becoming irrelevant” (p.45). Ferdman (2014) also pointed out the need for a more visible focus on diversity and inclusion, given OD’s history and values. Similarly, Shull, Church, and Burke (2014) highlighted respect, inclusion, authenticity, empowerment, openness, participation, and continuous learning as key values (Ferdman, 2014, p.44), which are all also critical to diversity and inclusion work. Despite some discussions of diversity and inclusion by a few OD authors (such as Church, Rotolo, Shull, & Tuller, 2014; Jackson, 2014; Markshak, 2014), it is still not evident that diversity and inclusion are fully and sufficiently infused as core values in the field of OD (Ferdman, 2014, p.44). This is problematic. There has also been a shift from just “diversity and inclusion” (D & I) initiatives toward a focus on “diversity, equity, and inclusion” (DEI) initiatives understanding that equity is a big part of the inclusive culture that organizations seek to create.

As OD research shared many similar values with DEI literature, Ferdman (2014) insisted “for OD to truly achieve its aims and be true to its values, more deliberate, systematic, and sustained attention to DEI is necessary. And this attention should go
beyond a general call for respect across differences to incorporation of perspectives, skills, and approaches that will truly embed diversity and inclusion as core OD competencies” (p.45). In his attempts to integrate these fields, he authored a list of questions and perspectives in this same article to help lead OD practitioners in the direction of infusing D & I work explicitly with OD practices (p.45).

Also within the OD literature are areas of research that focus exclusively on human capital and human resources. This literature revealed that while interventions, such as trainings or task forces, are helpful, it is apparent that mere awareness is insufficient. Kumar, S. and Chadha, S. (2018) explained that “organizations should consider making structural changes, implementing transparent and data-driven solutions, to give decision makers an understanding of how bias impacts decision-making, talent decisions, and business outcomes” (p.24). It was their position that as organizational development practitioners and consultants began to focus more on D & I work, it was important to remember there is no standard rule that is universally applicable. They emphasized, “You really have to evaluate your human capital, align the company strategy with the business strategy, and then devise a compensation, reward and a talent management system that resonates with the hearts and minds of your employees” (p.27). It is essential for organizations to provide not only the monetary, but also the non-monetary benefits that help employees to feel respected, values, and see themselves as an important part of the overall system. There are two important contributions that have come from developing OD literature. The first was that Kumar and Chadha (2018) warned against the risk of falling into the practice of directing efforts on the numbers or headcount when attempting to tie compensation to diversity outcomes. The second lesson was to not let D & I initiatives to simply become an HR agenda. Instead, the focus needed to be on designing cumulative multi-dimensional solutions to DEI initiatives (Kumar & Chadha, 2018), which is a similar to the conclusion of diversity literature (Shore et.al., 2011) and recent inclusion literature (Ferdman and Deane, 2013).

Overview of Diversity Literature

“In a world of increasing change and complexity, diversity provides the variety of perspectives and experiences that can benefit organizations and the communities in which those organizations reside.” (Shore, Cleveland, Sanchez, 2018)

Much of the past diversity literature that exists, solely focused on the disadvantage of very specific groups with specific diversity characteristics such as men and women (Weinberg, 2007), or minorities (Hansen, 2008), or heterosexism (Ragins and Cornwell, 2001), or immigrants (Hersch, 2008) in the workplace. However, scholars are beginning to increasingly focus on the ways in which diversity will enhance the workplace and any organizations that seeks to embrace it. Some initial findings (prior to 2011) in the
diversity literature documented the benefits of increased diversity and linked it to beneficial organizational outcomes such as:

Organizational commitment (Giffords, 2009); job satisfaction (Acquavita, Pittman, Gibbons, & Castellanos-Brown, 2009; Pitts, 2009); retention (Groeneveld, 2011); increased access to a more diversified client base (Cox, 1994; Herring, 2009; Thomas & Ely, 1996); greater creativity, innovation, and problem-solving ability (Bassett-Jones, 2005; Gonzalez & DeNisi, 2009; Richard, Barnett, Dwyer, & Chadwick, 2004; Richard,); improved corporate image (Cox, 1994; Robinson & Dechant, 1997); and ultimately higher organizational performance (Richard et al., 2004; Sacco & Schmitt, 2005). (Mor Barak et.al, 2016, p.305)

In the US in 2011, “Executive Order 13583 was passed and required the establishment of a coordinated government-wide initiative to promote diversity and inclusion in the Federal workforce” (Shore, Cleveland, Sanchez, 2018, p.177). Since the government mandated diversity initiatives in 2011, research has continued to expand on the benefits of creating diverse organization. The most important of these newly articulated benefits is psychological safety. As Shore, Cleveland, and Sanchez (2018) pointed out, psychological safety allows employees to engage in experimentation and feel empowered to create and innovate, which will ultimately transform the solutions in their organization and society. This creative benefit is key to understanding the transformational power of diversity, and demonstrates why only diverse organizations can be transformative. In addition to the many benefits of diverse organizations, diversity literature also outlined the many types of representations that are possible when trying to promote more diverse and representative organizations.

In Action Guide for Nonprofit Board Diversity, Daley, J. (2002) built upon Alexander’s (1976) model to outline the four types of representation that are possible. He defined statistical representation (persons who can share a central or defining characteristic of a group, but may be in significant ways atypical of the group in status, perspectives, interests and experiences), modal representation (persons who are members of a group and whose status, perspectives, interests and experiences are typical of most members of the group represented), sociopolitical representation (persons who are authorized by the group to act on its behalf, and as such, may be authorized to commit the represented group to a policy decision), and technical experts or advocates (persons who may have (or at least assert) specific knowledge about a group, but do not have the status of sociopolitical, statistical or modal representatives). Daley (2002) strongly emphasized the need to be specific in discussions of representation and diversity in light of typology of representation (p. 36).
Even with a plethora of evidence outlining the benefits of multicultural organizations and clearly defining the many types of representation possible, there is still a lot of hesitation across all sectors to fully embrace this transformation. More research has been done into the reasons why this may be. Researchers Plaut, Buffardi, Garnett, and Sanchez-Burks (2011) explored perceptions of exclusion/inclusion and further asked questions about the reaction of Whites’ (Caucasian) to multiculturalism. Their work is still very relevant to the nonprofit sector today in light of BoardSource’s recent statistics. More specifically, Leading with Intent (2017) demonstrated that nonprofit boards and leadership are predominantly Caucasian (Chief Executive: 90% Caucasian, Board Chair: 90% Caucasian, Board Members: 84% Caucasian). Plaut, Buffardi, Garnett, and Sanchez-Burks' (2011) research addressed a critical component in the success and/or failure of diversity initiatives: reactions of Whites to diversity initiative. Caucasians make up a majority of the leadership in the nonprofit sector, and therefore hold much of the power, as they are overrepresented in executive and senior management positions across the sector. So, without adequate buy-in and support from these organization leaders, attempts at DEI initiatives will be like with resistance.

Plaut, Buffardi, Garnett, and Sanchez-Burks’ (2011) research (which had been previously confirmed Eibach & Keegan, 2006) pointed to the finding that "Whites-many of whom are assumed to be motivated to preserve their group's privileges-tend to view the strides made by minorities toward racial equality as losses for Whites, whereas Blacks view the same progress as gains" (p.350). The bottom line in this diversity research has been narrowed down to one conclusion: Those in power need to become willing and comfortable with sharing power. Until that happens, there is no chance of creating diverse or inclusive environments within the nonprofit sector. Extensive research in the diversity field has contributed evidence proving the lack of diversity, the need and benefits of diversity, the definitions of diversity, and the proven effectiveness that only diverse organizations can achieve. As a nonprofit sector, organizations need to begin embracing this challenge and work, and the following section offers suggestions for achieving this diversity.

Creating a Climate for Diversity

The recent trend, as Kumar and Chadha (2018) pointed out, is that many organizations have fallen into the risk of directing diversity efforts on the numbers and headcounts of diverse persons in their organizations. Unfortunately, these initiatives only focus increasing the number of women and people of color. While the gender and minority gap continues to persist (Leading with Intent, 2017; Race to Lead, 2017; Daring to Lead, 2011), there are more types of diversity that need to be accounted for. Many times diversity initiatives are associated with simply re-assessing the hiring practices of the organization. Shore, Cleveland and Sanchez (2018) have similar agreed that in order
to create a climate for diversity it cannot simply begin and end as a Human Resources (HR) task. Creating diversity initiatives as HR practices can, however, be a “starting point for creating diversity by providing the tools to shift our focus from surface level difference to addressing organizational, social, and global issues by listening collectively to relevant constituents and by applying accumulated knowledge” (Shore, Cleveland, & Sanchez, 2018, p.187). Organizations can begin with analyzing and recreating straightforward HR practices, such as hiring practices or designate HR personnel to these initiatives, but it cannot end there.

Another important theme that has emerged in the literature about creating a climate of diversity is that this journey will not be a short process, it will take time to create and develop. Magaw T. and Nobile J. (2018) sought to bring reality to diversity efforts by reminding, "diversity is a marathon, not a sprint." Creating a diverse workforce is "not about a checkmark, it's about taking a long-term view toward diversity and inclusion by ensuring that all points of view are represented and respected" (p.2). Their research concluded that diversity efforts couldn’t start and stop at hiring; this is an essential component of inclusion work. As Magaw and Nobile (2018) also remind, "It doesn't work to hire a bunch of different people and forget the rest of it...you have to be intentionally inclusive," (p.3). Simply bringing in and having diversity isn’t enough to create a diverse climate. Diverse people need to permeate the organization and diverse perspectives need to be included in order to achieve the desired benefits of diversity.

Findler, Wind, & Mor Barak (2007) presented a model (Figure 1) to show the relationship that diversity has between organizational culture, employee well-being, job satisfaction, and organizational commitment. This research illustrated the development of the diversity literature by demonstrating that simply having the diversity isn’t enough; diversity needs to be included and permeated through the decision-making processes, the information networks, and the social support networks that exists in the organization. These measures are developed from the definition of inclusion that Mor Barak (2000) had previously defined as the extent to which individuals can access information and resources, are involved in work groups, and have the ability to influence decision-making processes.
In order to be diversity competent, organizations need to critically evaluate how current values and norms either contribute to or interfere with the inclusion of the diversity, and related outcomes (Findler, Wind, & Mor Barak 2007, p.84). In order to achieve change within the organizational culture, and achieve the desired outcomes, the organization (especially its leaders) need to evaluate all policies and practices and introduce changes throughout the organization, not just in the HR department. Changing policies and practices, along with creating and building up diversity within the organization, seeks to build trust and create a sense of belonging, satisfaction, and commitment to the organization. Some of the limits of diversity literature thus far are that it emphasizes the increase of diversity (through diversity initiative created to attract and retain diverse people), but can sometimes imply that having the diversity is enough. Diversity outcomes are absolutely necessary, but not sufficient to create a climate of diversity (of which the many benefits have been defined). Organizations need not only diversity, but also the full inclusion of that diversity through the entire organization. Therefore, this lack of a diverse and truly inclusive climate hinders the delivery of its full mission and its potential to be a transformational agent in the community.

Diversity versus Inclusion Definitions

The terms diversity and inclusion are often used interchangeably, but perhaps the most salient distinction between diversity and inclusion is that diversity can be mandated and legislated (as it was beginning in 2011), while inclusion stems from voluntary actions.
Roberson (2006) defined diversity as “focused primarily on heterogeneity and the demographic completion of a group or organizations” (p.228). Similarly, Mor Barak et. al. (1998) described diversity management as “specific policies and programs to enhance recruitment, inclusion, promotion, and retention of employees who are different from the majority of an organization’s workforce” (p.309). Inclusion, on the other hand, as defined by Roberson (2006) is “focused on employee involvement and the integrations of diversity into organizational systems and procedures” (p.228). Also, Shore, Cleveland, & Sanchez (2018) have similarly defined inclusion as requiring “a leveling of the playing field and providing opportunities through organizational and managerial practices that offer real prospects of equal access to valued opportunities for employees who belong to social identity groups that experience greater discrimination” (p.177). In light of these similarly defined distinctions, Roberson (2006) constructed an instrument to measure the degree to which an initiative supports diversity and/or inclusion measures in organizations. The scale that he created highlighted a number of attributes for diversity and inclusion ranging from “practices to increase the representation of different demographic groups [diversity], to broader initiatives intended to facilitate employee participation and engagement [inclusion]” (p.229). This scale clearly defines the differences between diversity and inclusion, but also demonstrates how the two can overlap and work together simultaneously.

While diversity climates have some elements that overlap with inclusive climates, there are also significant differences between the two:

Volpone, Avery, and McKay (2012) define psychological diversity climate as “an individual assessment of the extent to which an employee perceives that his or her organization maintains an inclusive environment committed to providing equal opportunity to all employees” (p. 255). In contrast, inclusive climate is a collective perception that there are expectations and norms that allow employees to behave in a manner that is consistent with aspects of their self-concept together with the various identities that they hold, and that they are included in decision making and supported in sharing views that are not part of the status quo (Nishii, 2013). Psychological diversity climate is measured in a manner that is consistent with diversity management practices with items such as “recruiting from diverse sources,” “offer equal access to training” and “open communication on diversity” (Volpone et al., 2012). In contrast, inclusion climate is measured via questions focusing on the unit that encourage employee experiences of inclusion such as “this unit provides safe ways for employees to voice their grievances” “this unit is characterized by a non-threatening environment in which people can reveal their ‘true’ selves” and “in this unit, everyone’s ideas for how to do things better are given serious consideration” (Nishii, 2013). Note however, that both measures have content pertaining to fairness consistent with the view that both diversity
management and inclusion emphasize equal access among all employees but especially those who belong to lower status groups to fair treatment and to opportunity. (Shore, Cleveland, & Sanchez, 2018, p.181)

Roberson (2006) and Shore, Cleveland, & Sanchez (2018) successfully demonstrated that while diversity and inclusion practices are separate initiative, they can and must to work together; you cannot successfully have one without the other.

**Diversity is Useless Without Inclusivity.** Even for organizational leaders who do not have a problem with sharing power, and are looking for ways to begin implementing inclusive practices, they are normally stifled by a common misconception about diversity. The findings of DEI research all agree upon the notion that, as Riordan (2014) stated: diversity is useless without inclusivity. Early diversity research focused on increasing the amount of diversity within organization to increase the access of power sharing in the organization, but recent research has found that diversity initiatives are not useful at more equally distributing power unless they are accompanied with intentional inclusive practices with in that same organization. Riordan (2014) stated, "while many organization are better about creating diversity, many have not yet figured out how to make the environment inclusive-that is, create an atmosphere in which all people feel valued and respected and have access to the same opportunities...that's a problem.” The common misconception that diversity is sufficient, has stifled actual progress towards inclusive environments for decades. A diverse climate is a necessary starting point, but an inclusive climate, as defined by Mor Barak et. al. (2016), is one that “leads to the full acceptance of all employees and provides an environment in which the full spectrum of talents of individual employees are used” (p.309). Inclusive environments build upon the foundation of diverse climates, and inclusive environments are the conductors of creative and innovative solutions that will transform the organization and community around it.

**Shifting the Focus From Diversity to Inclusion**

"Diversity of a workforce only provides the opportunity for greater innovation, but without inclusion such a benefit is unlikely” (Offerman & Basford, 2014).

Beginning in the 1990’s researchers began searching for ways to not simply promote diverse demographic characteristics, but rather integrate these diverse perspectives and individuals into organizations (Shore et al., 2011, p. 1281). While diversity management practices have focused chiefly on bringing women, people of color, and other members of other marginalized groups into the workplace, inclusion practices have sought to create equal access to decision-making, resources, and upward mobility opportunities for these individuals. However, as Shore, Cleveland, and Sanchez (2018) pointed out, diversity does not always bring beneficial results to organizations, and can in fact increase conflict and turnover, and lower cohesion and performance. With this
understanding, they have contributed to the developing inclusion literature field, by focusing on inclusionary practices that can promote the potential advantages and opportunities of having a diverse workforce.

**Inclusion Literature and Frameworks**

Scholarship focused on the development of inclusion is relatively new and still in the initial stages, only systematically being addressed in the social work and social psychology fields. Most recently, Shore, Cleveland and Sanchez (2018) completed a comprehensive review and synthesis of inclusion literature to date in which they concluded:

Inclusion opportunities for members of marginalized social identity groups at all levels of organizations are critical to providing an environment in which they can contribute more fully. Such opportunities are crucial for organizations to operate effectively and to truly enhance organizational success through inclusion. Without a commitment to inclusion of diverse people, organizations will continue to lose valuable employees who are women, people of color, and sexual and religious minorities, at a high rate. (p.186)

Although these are the most recent conclusions that have come from inclusion research, the concept of inclusion in the workplace can be traced back to the development of Brewer’s (1991) optimal distinctiveness theory (ODT). ODT explains the tensions between “human needs for validation and similarly to others (on one hand), and a countervailing need for uniqueness and individuation (on the other hand)” (p. 447).

There are dangers when only part of this definition is being emphasized. For example, Short et.al (2011) explained that when the focus is only on belongingness (i.e. assimilation), then there is the danger of encouraging individuals to suppress their opinions, backgrounds, and experiences, all of which make them who they are. Similarly, only emphasizing an individual’s uniqueness (i.e. differentiation) can lead to segregation and an overreliance on stereotypes in interpersonal interactions (p.1282). Therefore inclusion literature, specifically Shore et. al. (2011) and Pickett, Bonner, and Coleman (2002), built upon this definition and continually emphasized the importance of both a sense of belonging and of uniqueness (Figure 2) in order to fully achieve inclusion. This definition of inclusion, which focused on a person’s ability to satisfy his or her need for both belongingness and uniqueness, was novel in its combined approach to holistically ensure that people are being included in their organizations. This definition also equally invites the members of socially marginalized group to participate while also giving opportunities for members of non-marginalized groups to support other employees in their efforts to be fully engaged and authentically themselves in the workplace (Shore,
In addition to the benefits that Findler, Wind, & Mor Barak (2007) found that simply diverse organizations can experience (i.e. organizational commitment, well-being, and job satisfaction), Shore et al. (2011) has identified even more benefits that practically inclusive organizations will experience: High quality relations with group members and supervisors, job satisfaction, intention to stay, job performance, organizational citizenship, organizational commitment, well-being (stress, health), creativity, and career opportunities for diverse individuals. These benefits, resulting from a culture of inclusion, are only realized to the extent that there is full, multilevel inclusion of all persons in the workplace. Ferdman, B. and Deane, B. (2013), as previously mentioned, have offered a multilevel analytic framework for systemic inclusion (Figure 3); in order for all of the benefits of inclusion to become actualized then inclusion must be fully integrated into each level. The holistic integration of inclusion and inclusive practices at each level is what will ultimately lead to transformation: not only within the individuals that are a part of the organization, but also outside of the organization in the community in which it is a part of.
To create an authentic and transformational culture of inclusion, Ferdman and Deane (2013) insisted that inclusion be integrated simultaneously throughout each of the levels presented. Even though this model originated in the organizational development field, multiple inclusion literature scholars have pointed it to as the model framework for organizations to adopt during their efforts to be more inclusive (Ferdman & Deane, 2013, p.22-29).

There are six levels of Ferdman and Deane’s (2013) inclusive framework. They reviewed 17 other inclusion research studies and created these levels according the key themes and level of analysis that each study was focusing on. Their conclusions have been created in the framework offered (in Figure 3), and there is no particular order for each level; inclusion can begin and the outer level and move in or conversely begin as a grassroots, individual effort and affect the larger levels beyond it. Each level of the framework involved a difference experience of inclusion, and therefore implied that there were different strategies that can be employed at each level. This framework (created by Ferdman & Deane, 2013) will be the foundation for the expanded manual that is offered at the end of this report.
At the individual experience level, the experience of inclusion that each person has is the “degree to which individuals feel safe, trusted, accepted, respected, supported, valued, fulfilled, engaged, and authentic in their working environment, both as individuals and as members of particular identity groups” (p.18). The next level, the individual level, involved inclusive interpersonal behaviors. To help create the experience of inclusion that each person should experience, individuals can engage in a range of inclusive behaviors as they relate to others around them, such as to “seek other’s opinions and be curious about who they are and what matters to them, treating [others] in ways that to them signify respect, and work with others to arrive at jointly satisfying solutions rather than impose [your] own approach or direction” (p. 18). The following level, group-level inclusion, involved groups creating inclusion by engaging in suitable practices and establishing appropriate norms such as “treating everyone with respect, giving everyone a voice, emphasizing collaboration and working through conflicts productively and authentically” (p.18).

The next level, consisting of the leaders and leadership, acknowledged that leaders play an important role in fostering inclusion and can significantly influence the levels under it (group and individual inclusion). Leaders have an additional responsibility in systems of inclusion, including “holding others accountable for their behavior and making appropriate connections between organizational imperatives or goals-the mission and vision of the organization-and inclusion” (p.19). Beyond the level of the leader is the organization; the next level was inclusive organizations, as Ferdman and Deane (2013) recognized that organizational policies and practices play a critical role in fostering a climate of inclusion and provide a context in which individual behavior and leadership are displayed, cultivated, and interpreted. This level, they argued, is the level that received the most attention from the 17 other inclusion scholars that they studied (p.19). Ferdman and Deane (2013) stated, “the organization's culture-its value, norms, and preferred styles-as well as its structures and systems, provide the container in which individuals interact and interpret their experience” (p.20). Lastly, inclusive societies was the biggest level in acknowledging that:

These experiences, behaviors, policies, and practices all occur in the context of a broader societal framework, “including policies, practices, values, and ideologies that may or may not be supportive of inclusion...Inclusive communities and societies incorporate values and practices that encourage individuals and groups to maintain and develop their unique identities and cultures while continuing to fully and equally belong to and participate in the larger community. (Ferdman & Deane, 2013, p.20)

In context of this framework, Ferdman and Deane (2013) reminded that there are many definitions of inclusion, depending on which level you are engaging. They argued that it is
not necessary, or productive, to arrive at one single definition of inclusion because “the suitability of a particular version of the concept will depend on our frame of reference, our purpose, and our level of analysis” (p.21). This framework and understanding are inherently inclusive as it is adaptable and useful for any organization or individual looking to engage in this work and start to create systems of inclusion around them. As Ferdman and Deane (2013) concluded, “Inclusion is a concept and practice that can more or less apply to everyone in all locations and social systems, across multiple differences; it is not limited to workplaces or to a particular group or type of diversity” (p.31). It makes sense that inclusion literature and any inclusion frameworks would be inherently inclusive as well, inviting any and everyone into this work and encouraging participation on any and all levels in a system of inclusion.

OD, Diversity, and Inclusion Literature All Agree

The one commonality that organizational development, diversity, and inclusion literature all share is that this work, to create inclusive and transformational communities, begins with the leaders of that community or organization:

In sum, the research on organizational inclusion practices emphasizes the role of top management in building and supporting an environment in which members of all social identity groups can be authentic while also being treated fairly and respectfully. A key role for organizational leaders which is emphasized, involves addressing discrimination issues in the organization while also supporting and building a pipeline of talent among members of marginalized social groups through inclusive practices. (Shore, Cleveland, Sanchez, 2018, p.181)

Leadership is the most influential level in the system of inclusion, as it is the middle level, having the equal potential to influence the levels above it (organization and society) and below it (groups and individuals). The time for transactional leadership in nonprofit organizations has passed, which may have worked more in a more financially or results driven environment (Hoxha, 2015), and the time for transformational leaders to step up has arrived. There have been studies about the role of authentic leadership in fostering workplace inclusion (Boekhorst, 2015), but this research argues the need for transformational leadership due to the nature of change that inclusion work entails. It has been proven that transformational leadership is the most researched leadership style of the last decade (Hildenbrand & Binnewies, 2018; Arnold, 2017) and this report adds to this research by combining the existing literature about transformation leadership within an inclusion framework and analytical context.
Transformational Leadership Needed In Inclusion Work

Burns (1978) launched the concept of transformational leadership through his research on political leaders. His definition was as follows:

The transformational leader recognizes and exploits a necessity or demand from a potential person to follow. But, moreover, the transformational leader seeks to find the motivations of his subordinates, wants to meet high needs, and involves the whole person in this process. The result of transformational leadership is a relationship of mutual stimulation and development that transforms subordinates into leaders and leaders into moral agents. (El Toufaili, 2018, p.125)

As reported, transformational leadership is becoming more and more prominent at all levels of the organization (Toufaili, 2017) and leaders should learn how to empower their teams and begin to understand the complexities of the multilevel system that they are seeking to transform.

Building on Burns (1789), Bass and Avolio (1994) identified four main dimensions of transformational leadership: idealized influence, inspirational motivation, intellectual stimulation, and individual consideration (Hoxha, 2015, p.46). Each dimension explained the characteristic of a transformational leader in an organization:

Idealized influence refers to the leader who becomes a model for his employees. In this dimension, leaders apply their highest moral and ethical standards towards employees or followers rather than practicing power and authority in leading followers. In modern organizations, employees are more skillful and they expect their abilities to be acknowledged. When employees are acknowledged for their contributions, it is more likely that they will reciprocate the behavior of the leader with respect and improve their performance.

Inspirational motivation on the other hand, refers to a leader who gives meaning to different challenges at the work place. Leaders with this behavior inspire followers by providing meaning to followers’ work and effort. These leaders emphasize explaining the importance of their roles and performance to employees in the organization. This makes employees regard themselves as an important asset of the organization rather than a regular employee.

Intellectual stimulation means leaders motivate followers by providing them with a variety of problem solving skills. This leader behavior makes followers aware of their intellect and skills that they have in solving problems or challenges in the work place. Followers need to be encouraged to express their thoughts and
visions towards the organization and be taught to look at issues in different ways, thinking before acting and being accurate with decisions.

Individualized consideration refers to a situation whereby a leader has a personalized relationship with each employee, paying special attention to individuals in an organization. In other words this behavior focuses on how to treat employees as your colleagues with neither prejudice nor doubt, and seeing a future in them. (Hoxha, 2015, p.46)

These characteristics of transformational leadership help transform regular employees into extraordinary performers, and help to change their behavior from traditional to new ways of thinking.

Hoxha (2015) explained that this transformation and change of thought would inspire innovation and create motivation, teamwork, and other behaviors that help employees to find meaning in their work. In addition to the motivation and innovation that employees will experience, there is research to show that transformational leadership will help employees to even enjoy their work (Behery, 2008), prevent employee burnout and increase learning (Hildenbrand & Binnewies, 2018), promote job crafting (seeking resources, challenges, and reducing demands) by increasing adaptability (Wang, Demerouti, & Le Blanc, 2017), and lead to better psychological well-being overall (Arnold, 2017). In sum, there are many benefits that have been researched and proven in recent years about the use of transformational leader, and transformation leadership is an especially effective leadership style in the context of inclusion work due to the nature of reframing perceptions and implementing organizational change that it entails (Want, Demerouti, & Le Blanc, 2017, p.185). Transformational leaders help others to see change as an opportunity rather than as a threat, and motivate the organization to break old routines bringing new energy to changing work environments. Overall, the literature revealed that transformational leadership promotes confidence, encouragement, innovation, and trust, which is exactly the style that nonprofit leaders need to practice in their organizations when introducing and engaging in inclusion initiatives.

**A Review of Existing Models of Inclusion**

In addition to the framework presented by Ferdman and Deane (2013), there are other relevant frameworks to be explored in the organizational development, diversity, and inclusion literature that will all be synthesized into an expanded manual at the end of this report. The manual will combine and build upon the existing frameworks in the literature and provide strategies for practical implications in the field. The first to systematically research inclusion in work organizations was Mor Barak and Cherin (1998), in which they developed a inclusion-exclusion measure to serve as a tool for organizations
“to move beyond the current descriptive analysis of workforce diversity demographics. In other words, this tool can potentially replace the one-dimensional examination of workers' characteristics such as ethnicity, race, gender, and age with a multi-dimensional understanding of how people from diverse backgrounds relate to the organization and to their work groups” (p.61). Their scale measured perceptions of inclusion and exclusion with regards to: the decision-making processes, work group involvements, and access to information and resources (p.52). These factors (displayed in Appendix A) were scored according to indicators in that area of the organization and will be integrated into indicators in the presented expanded manual. These factors were chosen because Mor Barak and Cherin (1998) presumed these three factors were the underlying factors in a culture of inclusion. These factors indicated an individual’s perception of his or her relationship to the organization using these key organizational domains (p.52). These three areas were a good starting point and foundation for the later models of inclusion to build upon.

In addition Mor Barak and Cherin’s (1998) research, Cox (1991) studied the levels of inclusion that can exists within an organization depending on its stage of acceptance of diversity (which will also be integrated into the expanded manual). The outlined levels refer to how fully an employee can fully integrate himself or herself, culturally and structurally, into an organization. In a monolithic organization, one identity is dominant and those who do not fit that identity are not welcome, and in a plural organization, there is somewhat of a focus on increase diverse representation, but the organizational still expects individuals to assimilate to the dominant culture (Cox, 1991). Conversely, in a multicultural organization (the one organizations should strive toward), policies and practices “focus not only on reducing discrimination and increasing representation, but also on creating an environment in which individuals can contribute from their unique experiences and perspectives derived from who they are. That is, these unique aspects of individuals are integrated into the organizational culture” (Shore, Cleveland, Sanchez, 2018, p.191). This multicultural perspective by (Cox, 1991), in addition to the multi-factorial framework that Mor Barak and Cherin (1998) proposed are both important components of the dynamic and multilevel analytical framework that is recommended.

In addition to the three forms of inclusion that Cox (1991) developed, he also developed (in 1993) three diversity management strategies to adopt and implement diversity and inclusion strategies in an organization. His first strategy was to legitimize the diversity initiative. Diversity strategies, he argued, may be legitimized though a presentation of a business case for diversity. The second strategy, changing the culture and identity to emphasize valuing diversity, was usually led by a champion and pointed to his emphasis on leadership in this work. Cox (1993) emphasized that diversity work was not just about changing the numbers, but also changing the cultures and identity of the organization. His challenge to organizations was: How much are you willing to embrace
diversity if you are not willing to give up any power and control? (p.36). The third strategy, to use structures and policies to embed diversity practices and accountability, was an essential component to inclusion work. Cox (1993) offered a few strategies to help in this stage of inclusion: diversity committees, recruiters for diversity, diversity initiatives included in the organizational budget, and funding a diversity scholarship program. These are just a few of the strategies that can be implemented, and will be combined with others in the final manual.

In 2000, Mor Barak wrote *The Inclusive Workplace: An Ecosystems Approach to Diversity*, which built off her initial research of systemic inclusion and was one of the first to suggest expanding the notion of diversity to not only include the organization, but also the larger systems that constitute its environment. The concept of the “inclusive workplace” that she introduced “refers to a work organization that is not only accepting and using the diversity of its own work force, but is active in the community, participates in state and federal programs to include working poor people, and collaborates across cultural and national boundaries with a focus on mutual interests” (p. 347). This model was developed in the social work field, but can be applied to any other field as well, as organizations need to be aware of and become more active in their communities. Ferdman and Deane (2013), in addition to their multilevel framework about systemic inclusion mentioned previously, have also offered a Global Diversity and Inclusion Benchmarks (GDIB) model (Appendix B) that integrates external benchmarks into its framework also: including community and government relations. More and more literature is focusing on the ecosystem/systemic frameworks of inclusion that go beyond traditional D & I trainings. While trainings are an important component, they are not the entire frameworks for building inclusive environments.

Other important components for creating inclusive environments include important contextual antecedents which Shore et. al (2011) discovered in their research of inclusion (Figure 2). The antecedents include: an inclusive climate (i.e. fairness systems and diversity climate), inclusive leadership (management philosophy and values), and inclusive practices (promote satisfaction of belongingness and promote satisfaction of uniqueness). These all relate to some level of Ferdman and Deane’s (2013) framework and will be integrated in the final manual as well. Following Shore et. al. (2011) inclusion framework development, they continued their study on inclusion constructs in Shore, Cleveland & Sanchez (2018). They summarized many key themes and constructs that emerged in inclusion literature including: work-group inclusion (p. 178), leader inclusion (p.178-179), perceived organizational inclusion (p.179), organizational inclusion practices (p. 180), and inclusive climate (p.181). Each of these themes will be incorporated into the expanded manual and the strategies in each theme will be expanded upon according to Shore, Cleveland & Sanchez (2018).
The last important approach to inclusion work, Gestalt Training, comes from psychological therapeutic practice. Gestalt Training, as Jordan and Ewing (2016) argued, is under-explored in its relation and applications to diversity and inclusion work in organizations (p. 189). Gestalt speaks of notions of wholeness achieved through regulation of self and environment. Trainings in Gestalt practice “offer a process-oriented approach that respects whatever individuals bring to interactions in the present moment. This approach can move an intervention beyond stereotypical notions of what diversity brings to a group, and into how group members in the present moment are “showing up”:

Contact, within a Gestalt framework, can only occur with oneself, between individuals, or within a group/organization. Inclusion suggests both an ability to build ground through awareness and acceptance of self and other, and a quality of contact that promotes recognition of what each person brings to the moment. Thus, the authors see inclusion in work organizations as a dynamic, continuous process of creating space for the negotiation of respectful, healthy boundaries. Individuals are then able to bring their authentic selves into experiences with each other, which leads to meaningful contact and satisfaction of needs appropriate to the work organization context. As trust and the capacity of members to maintain spaces for meaningful contact grow, a greater variety of individual needs can be met; thus, the capacity for inclusion grows. The Gestalt approach to inclusion also requires a different orientation to traditional power relationships. Everyone becomes responsible for outcomes because everyone is active in providing the energy that produces the power to act. Also, inclusion in this process means that everyone is responsible for growing the group or organization’s capacity to meet needs, even if individual needs are not met all the time. Instead, there is attention to meeting the most important needs of each member. (Jordan & Ewing, 2016, p.192-193)

Overall, Gestalt approach focuses on where the system is now (reality), not where it “should be.” This allows the organization to view their transition not as what “should be happening,” but from a “process” orientation, which is a similar sentiment concluded throughout inclusion literature. Creating and implementing a climate of inclusion is a process, and is the responsibility of everyone within the system to be a part of the transformation. Jordan and Ewing (2016) offer organizations a great starting place to begin this work, from a critical self-awareness and reflection of where they are at right now. Then they work from where they are at to build an inclusive environment on every level that they are able to within their organization. The expanded manual offered in this report is intended to guide this process.
Section 3: Methods and Approaches

The primary purpose of this research is to engage in action research to improve the capacity and subsequent practices of the nonprofit sector in regards to inclusive and transformational organizations. This project proposes an expanded manual of inclusive practices to help guide organizations, of all sizes, on their DEI journeys. To achieve the broader objectives of this project, the following methods were employed:

**Primary Data Collection:** Primary data was collected from a series of six expert interviews with leaders from three nonprofit organizations, all at different points of their DEI journey. The nonprofit organizations were selected based upon their organization’s proven commitment to diversity, equity, and inclusion work. Either the organization had explicit principles of diversity (i.e. it is in their mission statement, there is an established position for the work, or there is some sort of diversity and/or inclusion statement from the organizations based on its values), or was engaging in practices of inclusion (practical inclusion) based on employee testimonials. The organizations selected were CompassPoint (practical inclusion), Homeboy Industries (practical inclusion) and Earth Justice (principles of diversity). The specific interviewees in each organization were selected based on their position in the organization (leaders of the organizations). The respondents were asked a series of 10 open-ended questions (below) about the culture of inclusion at their organizations and given a chance to give additional comments or advice at the end of the interviews. Their responses were then analyzed in relation to the level of inclusion that was being discussed (Table 1-3).

Interview Questions:

- What is your personal definition of inclusivity?
- What is your organizational definition of inclusivity, if different?
- How does it manifest itself in the organization?
  - When was a clear example of a policy that was conducive to an inclusive practice?
  - When was an example of an inclusive practice, even though there was no policy about it?
  - When have you seen both work well together?
- What is the biggest challenge in this work?
- What is something you think your org could be doing to improve inclusion?
- What does your organization do to promote inclusivity that is innovative?
- Is there anything else you would like to add?

**Secondary Data Collection:** A literature review was conducted of over 30 articles in the organizational development, diversity, inclusion, and transformational leadership literature to create an expanded model of inclusion for organizations. In addition to the peer-reviewed articles that were analyzed, various reports and statistics about current
diversity initiatives in the nonprofit sector were also consulted to provide context of the nonprofit landscape in which this report is being written.

Limitations

The limitations of these methods include the fact that these interview subjects were selected from a pool of employees at organizations where there were already established principles of diversity, or practices of inclusion (according to its values and employees). The recommendations and the proposed manual of practices may not be as relevant or applicable to organizations that have no intentions to begin DEI conversations. Another limitation is that leaders of the organizations were interviewed, so these results may not be as representative of the experience of inclusion throughout the entire organization. The approach of this research is from the assumption that all nonprofit should want to begin engaging in diversity, equity and inclusion work, and therefore speaks to an audience that is already interested in beginning their organizational journey. Another approach of this research is that it is intended for practical use by any nonprofit organization and its leadership.

Section 4. Data Analysis

Primary Data Analysis: Expert Interview Overview

The expert interview responses were a great source of information, not only to reinforce some of the same values and frameworks provided in the literature, but also to provide practical (in the field) recommendations for how these models are implemented at various organizations. The nature of inclusion work, and repeatedly confirmed through the interviews, is that there is not one way to do it “perfectly.” Diversity will look differently in every organization, depending on their context and location, but the important step is to begin the journey and open up these important conversations. In reviewing and comparing the responses and strategies that came out of the interviews, the following tables (Table 1-3) present a summary of common themes expressed by the respondents. The most common themes were relationship building, vision, shared leadership, leading by example, critical analysis, shared responsibility, equality, organizational commitment, and inclusive hiring processes. All 9 of these themes were related to three different levels of the inclusion framework presented by Ferdman and Deane (2013).

Themes From Expert Interview Consensus About Inclusion Work

The themes that emerged from the expert interviews were related to group/team inclusion (Table 1), inclusive leadership (Table 2), and inclusive organizational levels (Table 3), and are expanded upon in the following tables.
## Table 1: Group/Team Inclusion Themes From Expert Interview

<table>
<thead>
<tr>
<th>Relationship Building</th>
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<tbody>
<tr>
<td>Inclusive teams cultivate community through informal practices within the organization that allow people to get to know others outside of their formal role.</td>
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</table>

<table>
<thead>
<tr>
<th>Strategies</th>
<th>Quotes</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Volunteering together</td>
<td>&quot;We are working intentionally to acknowledge and break down habits of white supremacy—such as a sense of urgency, fear of conflict, and perfectionism—and we make sure to take time with each other to build alliances and community. Another thing we are doing is trying to make visible the usually invisible tasks that go unnoticed and bring them to light. We are trying to be better at naming them and equally distribute any and all emotional labor too. All of these things work to bring people together and make their day-to-day work and interactions more relational.&quot;</td>
</tr>
<tr>
<td>• Regular all-staff meetings</td>
<td>-Lupe Poblano, Compass Point</td>
</tr>
<tr>
<td>• Mentoring programs</td>
<td></td>
</tr>
<tr>
<td>• List serv: diversity forum</td>
<td></td>
</tr>
<tr>
<td>• Diversity Blogs</td>
<td></td>
</tr>
<tr>
<td>• Book clubs</td>
<td></td>
</tr>
<tr>
<td>• Daily reflections/ gatherings</td>
<td></td>
</tr>
<tr>
<td>• Employee Resource Groups</td>
<td></td>
</tr>
</tbody>
</table>

## Table 2: Inclusive Leadership Themes From Expert Interview

<table>
<thead>
<tr>
<th>Vision</th>
<th>Shared Leadership</th>
<th>Lead by Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inclusive leaders need to take initiative of developing the vision for DEI.</td>
<td>Inclusive leaders need a be willing to share power, be held accountable to others, and experiment with distributive management philosophies (such as Holocracy) in order to work to break down hierarchies in their organization. Feedback and performance reviews should be reciprocal.</td>
<td>Inclusive leaders encourage others to engage in critical reflection and have the courage to be authentic, vulnerable, and humble. Leaders must ask themselves: How much am I willing to give up power and control?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Strategies</th>
<th>Quotes</th>
<th>Quotes</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Including diverse perspectives in developing the DEI vision</td>
<td>&quot;I come from a corporate background, and there is a big hierarchy in that space. In nonprofits, less so. What I’ve learned is that when you are trying to help others, if you can learn to see yourself in them [and celebrate your similarities], as opposed to always trying to teaching them something, then people will develop and grow a lot faster and better than you just telling them to do these things. I’ve personally benefitted from being here, even though I used to run billion dollar businesses, as I have learned more about life, and people, and inclusion, respect, and nonjudgment than at any other point in my life. These things are easy to say, hard to live by, but they make a huge difference.&quot;</td>
<td>&quot;Do you have enough confidence in yourself to be humble? Otherwise you get insecure people who are wanting to assert themselves and the opposite of vulnerability is grievance (how can we change this, we need to move in another direction, negative) more about their insecurities. But if anchored in humility and vulnerability, then people will follow them.&quot;</td>
</tr>
<tr>
<td>• Ongoing conversations to re-evaluate the vision</td>
<td>-Fr. Greg Boyle, Homeboy Industries</td>
<td>-Thomas Vozzo, Homeboy Industries</td>
</tr>
<tr>
<td>Critical Analysis</td>
<td>Shared Responsibility</td>
<td>Organizational Commitment</td>
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</tr>
<tr>
<td>Inclusive organizations need a historical and systemic analysis of the culture of white supremacy that exists within the organization through the lens of equity.</td>
<td>Inclusive organizations make inclusion work everyone’s priority and do not silo off the work to one person or department.</td>
<td>Inclusive organizations make explicit, long-term commitments and designate substantial resources into their DEI work. Organizations must understand that inclusion work is mission work.</td>
</tr>
</tbody>
</table>

**Strategies:**

- Being transparent about where you are at as organization and where you want to go.
- Individuals must engage in individual reflection as well in order to make organizational reflections more authentic.

**Quotes:**

"We recognize that we are a part of a white supremacy culture, and just by being in the culture means we bought into at some point without realizing it. We are now trying to ask questions, as individuals and as an organization." - June Katzsch, Earth Justice

**Strategies:**

- Recognition that all organizations, no matter their size, are responsible for this work.
- Accept and become accountable for the role that your organization plays in the community it is located in.
- Build a team of DEI staff, not just one.

**Quotes:**

"Everyone has to recognize that they are a part of that [Diversity, equity, and inclusion] team and that their actions and interactions are all a part of it. We share personal responsibility and each of us needs to recognize the work we need to do internally and externally to move our inclusion initiatives forward." - Maclovia Quintana, EarthJustice

**Strategies:**

- Implicit bias and DEI training (done by outside consultants such as Aorta, Visions Inc., or UNtrainings)
- Engage in regular conversations about the injustices in the world and in their organization
- Liberate board structures

**Quotes:**

"If there are oppressive things affecting your organizations, then they are stopping you from delivering your mission fully." - Lupe Poblano, CompassPoint

"We need to do more inclusion work internally, in order to do it externally better and serve our clients to our fullest ability." - June Katzsch, Earth Justice
Table 3b: Inclusive Organization Themes From Expert Interview

<table>
<thead>
<tr>
<th>Equality</th>
<th>Inclusive Hiring Practices</th>
<th>Accountability</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inclusive organizations acknowledge that fairness and equality are not the same thing.</td>
<td>Inclusive organizations have hiring processes that are designed to attract a deeply diverse staff...to let them feel even in the hiring process that they are valued and that they will be invited to bring their whole selves to our work.</td>
<td>Inclusive organizations re-asses their systems of evaluation regularly to ensure they are meeting the needs and expectations of all people. This will look different for each organization.</td>
</tr>
</tbody>
</table>

Strategies:
- Equitable distribution of:
  - management responsibilities
  - emotional labor
  - compensation
  - resources (such as professional development)
  - Equitable and inclusive discipline policies
  - Making sure ALL people within the organization feel equally comfortable in the work place to be their full and authentic self.

Quotes:
- "At some organizations, everyone gets the same professional development budget stipend. Why would someone who graduated from Stanford need or get the same amount of money as some one who didn’t go to college? We need to have better policies to reflect these differing needs."
  - Lupe Poblano, CompassPoint
- "In my experience, I completely agree, diversity is not the end point. Once we started recruiting diversity not just by race and class, but by political analysis as well. We were looking to hire people with a critical race analysis as we worked toward increasing our race consciousness as a predominantly white organization. This changed the process we used for hiring...we didn’t want to set up anyone to fail. You can’t work here if you’re not willing to have these conversations daily."
  - Jeanne Bell, CompassPoint
- "We are currently working on figuring out a new system of accountability. This is especially challenging for us, since we have 13 offices around the U.S., but we still want some sort of way to measure and get feedback about the ways that our organization is including diverse opinions or not. I am trying to step outside of my role and experience as a woman of color, since I know that my experience is not the same for every other woman of color in the org. How do I measure that? I think it looks different for each org."
  - Maclolia Quintana, Earth Justice

Secondary Data Analysis

As previously demonstrated in the literature review, inclusion research is an emerging field of literature that has only begun recently to talk about inclusion in a multilevel analysis framework (Ferdman & Deane, 2013). As Figure 3 demonstrates, many authors and organizations talk about inclusion work, but do not realize that they may only be talking about promoting inclusion on one level of the system (i.e. maybe inclusive workgroups). But as the research shows (Figure 3), in order to be truly inclusive, there must be inclusion at all six of the described levels. The secondary data and research has helped to give context to the primary data results, and also provided helpful understandings of what inclusion is. The literature revealed that there is no one universally accepted definition of inclusion, since it will be different for each organization,
individual, and society, but there are some components of inclusion that are essential to any definition.

Ferdman (2017) said, “Inclusion at work has to do with how organizations, groups, their leaders, and their members provide ways that allow everyone, across multiple types of differences, to participate, contribute, have a voice, and feel that they are connected and belong, all without losing individual uniqueness or having to give up valuable identities or aspects of themselves.” This definition of inclusion built off Shore et. al.’s (2011) explanation that “Inclusion is when an individual is treated as an insider (belonging), and also allowed/encouraged to retain their individuality (uniqueness) within the group.” All of the secondary data agreed that there is no one definition of inclusion, but whatever definition organizations come to use, it must simultaneously allow for people to belong while also valuing their uniqueness. These two values must be in harmony with each other, and co-exist on each level of the inclusion framework.

Section 5: Implications and Recommendations

The implications of these findings are two fold: one is that inclusion must exist within a multiple levels of a society or organization, while also promoting both belonging and uniqueness. Secondly, the literature that exists about inclusion work offers a helpful multilevel analytical framework in which to frame the conversation, but lacks the tactical suggestions for how to do this holistically. To date, no author has been able to expand upon Ferdman & Deane’s (2013) model by expanding upon the practical implications and strategies of inclusion at each level. This report seeks to fill this gap and offers both an adapted model of inclusion (based on Ferdman & Deane’s 2013 system of inclusion framework), and also suggests an expanded manual of inclusive practices, that is organized by all six levels in an inclusive framework, in order to define what inclusion looks like at each level, and to recommend strategies for how to promote inclusion at each level.

An Adapted Model of Inclusion

The model presented (Figure 4) is an adapted model from Ferdman & Deane’s (2013) model. The adapted model presented has been updated to reflect the findings from the data in that the importance of inclusion work starts with the individual. No matter what level of inclusion is (individual, group, leader, organization, or society), there are individuals that make up each of these levels, and they are all connected. The individual has the potential to influence and change the dynamics at each level, therefore the reason that the model has been adapted to shift the focus of the individual to the center of the model. The dotted lines between each level indicate the fluidity and influence that each level has with the others. The double-sided arrow demonstrates how there is no beginning or no end do the movement. Inclusion can start at the individual and then spread out to the other levels, or visa versa. The main conclusion from this
adapted model is that the individual, and each person’s individual experience of inclusion, is what makes inclusive initiatives successful or not. When individuals are inclusive and feel included, they are more likely to promote inclusion at all the other levels, which is the goal.

Figure 4: Adapted Model of Inclusion

An Expanded Manual of Inclusion

The manual presented below has been expanded from the previous work of Ferdman & Deane’s (2013) findings. Ferdman and Deane (2013) were the first to understand that inclusion exists in a multilevel framework and defined what inclusion is at each level. What they did not include, however, was how to achieve it. This model expands upon previous definitions of inclusion at each level, but then additionally adds tactical and strategic suggestions (based on the themes that emerged from the primary data and expert interviews) of how to achieve inclusion at each prospective level. Note that all definitions of inclusion (at each level) refer to the definition that Ferdman and Deane proposed when they created their model, and any other strategies or suggestions (that are not otherwise cited) can be referenced in the data analysis section as they have
all come from the expert interviews. This manual intends to provide nonprofit leaders with a starter’s guide for “how to” create inclusion around them. No matter what level someone desires to begin inclusion work, as long as they work to create it in the environments around them also, then the entire system will work together to create inclusion.

Figure 5: Expanded Manual of Inclusion

Individual Experience of Inclusion

Definition: “The degree to which individuals feel safe, trusted, accepted, respected, supported, valued, fulfilled, engaged, and authentic in their working environment, both as individuals and as members of particular identity groups” (Ferdman and Deane, 2013, p.18).

Strategies:

• Helping other to feeling safe: Safe is defined as “the psychological and physical safety associated with sharing different opinions and views from others” (Shore, Cleveland and Sanchez, 2018).

Inclusive Interpersonal Behavior

Definition: “To seek other’s opinions and be curious about who they are and what matters to them. Treat them in ways that to them signify respect, and work with others to arrive at jointly satisfying solutions rather than impose my approach or direction” (Ferdman and Deane, 2013, p.18).

Strategies:

• Authenticity: organizational support of transparency and sharing of valued identities. Similar to the uniqueness component of Short et. al.’s (2011) inclusion model where employees can share valued identities that may differ from dominant organizational culture or employee lifestyles without repercussion (Shore, Cleveland, Sanchez 2018).

• Self-Awareness: developing a consciousness of one’s own identity and desires allows you to clearly communicate those with others. Also allows you to be more open to change as you become more aware and accepting of yourself and others (Gestalt Training, Jordan & Ewing, 2016).
Group/Team Inclusion

Definition: “Groups create inclusion by engaging in suitable practices and establishing appropriate norms such as: treating everyone with respect, giving everyone a voice, emphasizing collaboration and working through conflicts productively and authentically” (Ferdman and Deane, 2013, p.18).

Inclusion exists when all employees:

- feel part of informal discussions in work groups
- feel connected to work group
- share information with other work group members
- listen to what others have to say
- respect others’ judgment
- feel a part of decision-making

(Shore, Cleveland & Sanchez, 2018)

Strategies:

- **Relationship Building:** Community is cultivated through informal practices within the organization that allow people to get to know others outside of their formal role.
  - Examples:
    - Volunteering
    - Regular all-staff meetings
    - Mentoring programs
    - Listserv or diversity forums
    - Diversity Blogs
    - Book clubs
    - Daily reflections/gatherings
    - Employee Resource Groups

Inclusive Leadership

Definition: “Leaders play a vital role in fostering inclusion. Leaders have additional responsibilities, including holding others accountable for their behavior and making appropriate connections between organizational imperatives or goals-the mission and vision of the organization-and inclusion” (Ferdman and Deane, 2013, p.19).

“Leaders of diverse and inclusive organizations must model comfort with diversity, alter rules for acceptable behaviors to ensure wide application, create opportunities for dialogue about and across differences, demonstrate an interest in learning and be authentic
about their own challenges and triumphs to encourage authenticity in others” (Shore, Cleveland, & Sanchez, 2018, p.178).

Strategies:

• **Vision**: Leaders need to take initiative in developing the vision for DEI, while also including diverse perspectives in that process.

• **Shared leadership**: leaders need to be willing to share power, be held accountable to others, and experiment with distributive management philosophies to work to break down hierarchies. Feedback and performance reviews should be reciprocal and supervisors should regularly give and receive feedback to and from their team.

• **Transformational Leadership**: Leaders must demonstrate idealized influence, inspirational motivation, intellectual stimulation, and individual consideration (Hoxha, 2015, p.46). Transformational leaders work to change the culture and identity by introducing new values and conversations into the organizations.

• **Lead By Example**: Leaders need to encourage others to engage in critical reflection and have the courage to be authentic, vulnerable, and humble.
  o Ask yourself: “How much am I willing to give up my own power and control?”

Inclusive Organizations

**Definition:** “The organization's culture-its value, norms, and preferred styles-as well as its policies, structures and systems, provide the context in which individuals interact and interpret their experience.”- (Ferdman and Deane, 2013, p.20).

Strategies:

• **Know Your Why**: Diversity without inclusion and ownership does not work. It is necessary to identify and find answers for why should companies focus on diversity. While every organization might have a variety of reasons, those reasons should be stated as organizational principles and values that are acknowledged and respected across the entire organization. (Kumar And Chada, 2018).

• **Inclusive Hiring Practices**: Organizations need to develop hiring practices that are designed to attract a deeply diverse staff
population. People should feel, even in the hiring process, that they are valued and will be invited to bring their whole selves to work.

- Examples:
  - Recognize that hiring practices are a start, not a finish
  - Remove educational requirements from job postings
  - Communicate salaries and do not negotiate starting salaries
  - Pay a living wage to all and ensure no one is making more than 3x any one else at the organization
  - Ask explicit questions about lived experience and racial justice analysis in interviews
  - Do not give the COO or CEO final say of hire
  - Recruit clients

- **Organizational Commitment:** Organizations must make explicit, long-term commitments and designate substantial resources to their DEI work. Inclusion work is mission work. This means liberating staff and board structures, engaging in regular and meaningful trainings and conversations about the injustices around them.

- **Shared Responsibility/Decision Making:** Inclusion work is everyone’s work, not one department or position. Also, organizations should be structured so that multiple people are...
  - Able to influence organizational decisions
  - Able to influence work assignment decisions
  - Consulted about important project decisions
  - Have a say in the way work is performed/evaluated
  - Believe that their ideas/perspectives are influential
    - (Mor Barak and Cherin, 1998)

- **Critical Analysis:** Organizations need a historical and systemic analysis of the culture of white supremacy that exists within it through the lens of equality. This reflection and analysis needs to be at the organization and personal level.

- **Equality:** Inclusive organizations acknowledge that fairness and equality are not the same thing. There must be an equitable distribution of: management responsibilities, emotional labor,
compensation, resources, discipline, and opportunities. (Shore, Cleveland, and Sanchez, 2018)

- **Accountability**: Organizations need to re-assess their systems of evaluation regularly to ensure they are meeting the needs and expectations of all people. This will look different for each organization. The organization also needs to develop metrics and ways to measure the effectiveness of the DEI initiative.

Inclusive Societies:

**Definition:**

These experiences, behaviors, policies, and practices all occur in the context of a broader societal frameworks, including policies, practices, values, and ideologies that may or may not be supportive of inclusion...Inclusive communities and societies incorporate values and practices that encourage individuals and groups to maintain and develop their unique identities and cultures while continuing to fully and equally belong to and participate in the larger community” (Ferdman and Deane, 2013).

**Strategies:**

- **Active Participants:** Organizations must not only accept and use the diversity of their work force, but also be active in the community. They must participate in state and federal, and local programs to help supplement the work that they are trying to do. Organizations must include the disadvantaged communities that they seek to serve, and the best way to do it is through being active, and collaborative participants in their community also (Mor Barak, 2000).

**Recommendations**

1. **Individual Recommendation:** Every person can and should be engaged in inclusion work by personally developing their self-awareness and critical reflection, which will then make the organizational reflection more authentic and transformative.

2. **Interpersonal Recommendation:** Seek other's opinions and be curious about who they are and what matters to them outside of their job role.

3. **Group/Team Recommendation:** Work to build more inclusive dynamics by respecting and valuing each member, as they deserve to be, and by building relationships with others.
4. **Leader Recommendation:** Create conversations around the fact that diversity measures and inclusion initiatives are not the same thing—you can’t have one without the other.

5. **Leader Recommendation:** Develop and practice transformative leadership styles in order to set the vision for an inclusive environment, and also to model the inclusive behaviors that they hope to cultivate in their organizations.

6. **Leader Recommendation:** Share decision-making power and responsibilities across the organization so that there is equality and accountability for everyone.

7. **Organization Recommendation:** Engage critical reflection in order to break down the hierarchies and systems of exclusion that exist within.

8. **Organization Recommendation:** Make an explicit, long-term organizational commitment to inclusion work, and state those principles publicly.

9. **Organization Recommendation:** Re-assess and develop inclusive hiring practices.

10. **Societal Recommendation:** There is no "right way" to start inclusion work and work toward a more inclusive society. The important thing is that communities begin to think and talk about being more inclusive in their communities, organizations, groups/teams, and when interacting with other people. If we do that, then we will, in time, create a more inclusive society and a just world.

**Section 6: Conclusions**

This research began with the thesis that organizations: that have dynamic work environments (i.e. transformational leadership, principles of diversity, and practices of inclusion) are more likely to fulfill their missions and thereby create transformational communities around them. This report not only confirms the importance of all three components of a dynamic work environments but has similarly concluded that (1) Principles of diversity, without inclusive practices, are useless (2) There are similar themes and trends that have emerged from multiple nonprofits that are already engaged in diversity, equity, and inclusion work (3) This report offers an expanded manual, combined from the literature and experts in the field, to help organizations become more inclusive, effective, and transformational in their work. Therefore, with the understanding that diversity is useless without inclusivity, it becomes clear that organizations, especially in the nonprofit sector, cannot become complacent with declaring principles of diversity, but rather work to become more intentionally, and practically, inclusive. As the world continues to become more diverse, it is critical that organizations begin to pay attention to the organizations benefits and mission imperatives that diversity and inclusion work have. Future research should continue to expand upon the presented manual and continually look for ways to improve their inclusive practices and structures. Inclusion work is never done, there are always ways to be more inclusive, which is the work that future leaders should look forward to.
List of References


## Appendix

### Appendix A: Principal Component Factor Analysis for the Inclusion-Exclusion Items

<table>
<thead>
<tr>
<th>Factor</th>
<th>Item</th>
<th>Factor Loading</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Work Group Involvement (WGI)</strong></td>
<td>Feel part of informal discussions in work group</td>
<td>.76</td>
</tr>
<tr>
<td></td>
<td>Feel isolated from work group (R)</td>
<td>.72</td>
</tr>
<tr>
<td></td>
<td>Work group members don’t share information with me (R)</td>
<td>.83</td>
</tr>
<tr>
<td></td>
<td>People in work group listen to what I say</td>
<td>.71</td>
</tr>
<tr>
<td></td>
<td>My judgment is respected by members of work group</td>
<td>.57</td>
</tr>
<tr>
<td></td>
<td>Work group members make me feel a part of decisions</td>
<td>.50</td>
</tr>
<tr>
<td><strong>Influence in Decision Making (IDM)</strong></td>
<td>Able to influence organizational decisions</td>
<td>.80</td>
</tr>
<tr>
<td></td>
<td>Able to influence work assignment decisions</td>
<td>.77</td>
</tr>
<tr>
<td></td>
<td>Consulted about important project decisions</td>
<td>.64</td>
</tr>
<tr>
<td></td>
<td>Have a say in the way work is performed</td>
<td>.60</td>
</tr>
<tr>
<td><strong>Access to Communications and Resources (ACR)</strong></td>
<td>Provided feedback by boss</td>
<td>.78</td>
</tr>
<tr>
<td></td>
<td>Don't have access to training I need (R)</td>
<td>.63</td>
</tr>
<tr>
<td></td>
<td>Have all the materials I need to do my job</td>
<td>.53</td>
</tr>
<tr>
<td></td>
<td>Rarely receive input from my supervisor (R)</td>
<td>.51</td>
</tr>
</tbody>
</table>

*(R) indicates a negative item where the scoring was reversed to make it consistent with the rest of the scale.

Please note: Factor loadings < .50 were suppressed.
Appendix B: Global Diversity and Inclusion Benchmarks (GDIB) Model

Author’s Bio

Alyssa Perez is pursuing a Masters in Nonprofit Administration at the University of San Francisco. Her experience as a graduate student has given her the opportunity to study vital disciplines in the nonprofit sector: diversity and inclusion initiatives, grant writing, fundraising and marketing, social impact consulting, financial literacy, ethical leadership, governance, organizational development strategy, HR management, and public policy advocacy. During her time as a graduate student, she has worked on events that brought together community leaders and academics to help bridge the gap between social justice issues. She received a B.A. of Political Science and Theological Studies from Loyola Marymount University, Magna Cum Laude, where she was also elected as student body president. Alyssa has recently returned from two years of service with the Jesuit Volunteer Corp in Belize City where she taught reading and directed the after-school sports program. As a young professional, she has interned in education-based nonprofit organizations, including Youth Service America (Washington, D.C.), Sacred Heart Community Service (San Jose, CA), and the Lane Center for Social Thought (San Francisco, CA). Alyssa has continuously been involved with mentoring programs, through high school and college, and loves any opportunity to connect with and mentor at-risk youths. Her affiliations include Alpha Sigma Nu Honors Society, Professional Businesswomen of California (Scholarship Honoree) and Latino Alumni Association. Alyssa is looking forward to continuing her work with at-risk youth, using her expertise and experiences to develop service-learning programs. She is an exemplary leader, committed to creating inclusive work environments, and will continue to be a leader in the nonprofit sector who is with and for others.