DEVELOPING A NONPROFIT BOARD FOR DIVERSITY, EQUITY, AND INCLUSION
A TOOL FOR EFFECTIVELY MEASURING BOARD READINESS, VULNERABILITIES, AND INTEGRITY

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622 Nonprofit Data Analysis - Capstone
Spring, 2019
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ACKNOWLEDGEMENTS

This research was made possible by, Dr. Jane Pak, JoAnne Speers, Dr. Cio Hernandez, Dr. Richard Waters, Dr. Marco Tavanti, and the San Geronimo Valley Community Center.

Thank you for contributing your expertise to this important research topic!
INTRODUCTION

Even well-meaning Boards often fall short in the areas of Diversity, Equity, and Inclusion (DEI). Many lack an adequate understanding of how to effectively assess, educate, and implement policies and practices that will make a difference. Most nonprofits are perpetually under resourced and taking an active approach to DEI can feel like an overwhelming task with no clear starting place. This research aims to change this.
WHY AM I DOING THIS WORK?

1. My values
2. My career
3. My beliefs around how the nonprofit should function and serve
## Key Terms and Values

**California Board of Behavioral Sciences (BBS) Definition of Diversity**

<table>
<thead>
<tr>
<th>Key</th>
<th>Term</th>
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<tbody>
<tr>
<td>S</td>
<td>Socioeconomic status and education</td>
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<tr>
<td>C</td>
<td>Culture, race, ethnicity, national origin</td>
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<tr>
<td>A</td>
<td>Age, developmental stage</td>
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<tr>
<td>G</td>
<td>Gender, sexual orientation</td>
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<tr>
<td>S</td>
<td>Spirituality, religion</td>
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<tr>
<td>O</td>
<td>Other - disability, occupation, housing</td>
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KEY TERMS AND VALUES

- **Diversity**
  - Respecting individual differences

- **Equity**
  - Creating equal access to opportunities

- **Inclusion**
  - Experiencing a sense of belonging and feeling valued
RESEARCH OBJECTIVES

• What are the indicators of DEI readiness, vulnerability, and integrity?

• How can boards effectively identify and assess their vulnerabilities, integrity, and readiness to implement diversity and inclusion practices?

• What are the benefits to identifying gaps between diversity and equity and inclusion?
METHODS AND APPROACHES

- **Literature Review**
  - Peer-reviewed articles
  - Blogs, podcasts, webinars on current DEI trends
  - Books

- **Expert Interviews**
  - Nonprofit Board leaders/members
  - Nonprofit Executives
  - Diversity, equity, and inclusion subject matter experts

- **Case Study**
  - 5-1 Likert scale survey (Definitely-Definitely Not)
  - Participants (11 Board members and 14 staff at nonprofit organization)
  - Post survey interviews
EXPERT INTERVIEWS

Jane Pak
- **Board Chair, Refugee Transitions (2016-Present)**
- Director of Strategy and Development, Refugee Transitions (2012-2016)
- Adjunct Professor in Nonprofit Strategic Governance (University of San Francisco)
- Doctorate in Human Rights Education, Stanford University

Joanne Speers
- **Executive Director, Institute for Local Government (1998-2014)**
- General Counsel, League of California Cities
- Adjunct Professor in Nonprofit Strategic Governance (University of San Francisco and University of the Pacific)

Dr. Cio Hernandez
- **Founder, Equity and Space (Present)**
- Institutional Review Board Member, Kaiser Research Institute (2004-Present)
- Board of Supervisors Health Equity Staff, Marin County Health and Human Services (1995-2018)
- PhD, Health Care Leadership (UC Davis)
<table>
<thead>
<tr>
<th><strong>Readiness</strong></th>
<th><strong>Vulnerabilities</strong></th>
<th><strong>Integrity</strong></th>
</tr>
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<tbody>
<tr>
<td>• Champion(s) for DEI</td>
<td>• Division between Board and Staff</td>
<td>• Frequent opportunities for Board/Staff shared contexts</td>
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<tr>
<td>• Ability to embrace ambiguity and discomfort</td>
<td>• Fear of “messing with a good thing”</td>
<td>• Willingness to adapt when needs of the Board change</td>
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<tr>
<td>• Understanding and agreement of shared values</td>
<td>• Worry that DEI measures will decrease existing boards privilege</td>
<td>• Creating personalized plans for DEI with each person (what works for one person won’t necessarily work for another).</td>
</tr>
<tr>
<td>• A learning and growth mindset</td>
<td>• Thinking that DEI solutions are one-size-fits-all</td>
<td>• Board limits that allow for regular changes and reassessment of Board DEI</td>
</tr>
<tr>
<td>• An understanding of variance in privilege</td>
<td>• When checklists, matrices, etc. are used in isolation</td>
<td>• Regular generative thinking/conversations around DEI</td>
</tr>
<tr>
<td>• A shared understanding of DEI and an agreed upon framework for discussing and evaluating.</td>
<td>• Using lack of resources as an excuse for not implementing inclusion practices</td>
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<tr>
<td>• An ability to uncover personal biases.</td>
<td>• Lack of Board involvement in program</td>
<td></td>
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<tr>
<td>• Empathy, curiosity, respect</td>
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### Key Indicators

<table>
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<tr>
<th>Readiness</th>
<th>Vulnerabilities</th>
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<tbody>
<tr>
<td>Identify your Champion(s) for DEI</td>
<td>Using lack of resources as an excuse for not implementing inclusion practices</td>
<td>Creating personalized plans for DEI with each person (what works for one person won’t necessarily work for another).</td>
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INSTRUMENT FORMAT

- Survey-based self assessment tool
  - 18 questions for the Board, 23 questions for staff
- Each question related to the indicator categories of readiness, vulnerabilities, integrity, and/or personal biases.
- Some questions included caveats/clarifications to go deeper than explicit biases and explore a more complex version of DEI.
<table>
<thead>
<tr>
<th>Category</th>
<th>Indicator</th>
<th>Question</th>
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</thead>
<tbody>
<tr>
<td>Readiness</td>
<td>Champion(s) for DEI</td>
<td>I am willing to be a voice of diversity for the organization/community, even if it is contrary to the majority opinion.</td>
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<tr>
<td>Vulnerabilities</td>
<td>Using lack of resources as an excuse for not implementing inclusion practices.</td>
<td>I am open to expanding positions, placements, programs, and decision-making power to those of lower socioeconomic status, even if my organization has to provide transportation.</td>
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<tr>
<td>Integrity</td>
<td>Making DEI personal</td>
<td>I am willing to consider opportunities that may not benefit us equally.</td>
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<tr>
<td>Personal Biases</td>
<td>Education level.</td>
<td>I value voices of those who have lower educational experiences to the highest levels of education.</td>
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<tr>
<td>Staff (Vulnerabilities)</td>
<td>Division between Board and Staff</td>
<td>The Board of Directors understands my experience as a staff member.</td>
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Post Survey Interview Questions

1. Did the survey spark conversation or action on the Board (Staff)? Please describe.

2. Was the survey accessible to you? (i.e. was the language understandable, was the survey format easy enough to understand).

3. Were there any survey questions or part of the survey process that made you feel uncomfortable?
IMPLICATIONS

1. An effective assessment tool for Boards and staff to begin their DEI process.
2. A comprehensive list of indicators that provide a starting place for Boards.
3. A better understanding of the organizational benefits to taking a more intentional approach to DEI.
RECOMMENDATIONS

Organizational Recs

1. Readiness:
   • Find your champions
   • Educate your people
   • Talk about privilege and make it safe to share

2. Vulnerabilities:
   • Remove donation requirements.
   • Ask hard questions consistently.
   • Even small steps are progress.

3. Integrity:
   • Create Board and staff shared contexts.
   • Personalize DEI!
   • Enforce term limits

Tool Recs

1. Define DEI jargon and terminology
   • Privilege, preferred pronouns, DEI

2. Create alternative ways to collect data
   • Focus groups, hearing assisted

3. Add questions that challenges the idea of “messaging with a good thing.”
   • Adding differing perspectives to the Board will create conflict and decrease the Boards effectiveness in making decisions for the organization.
   • The Board is as effective as it could be.

REFERENCES


THANK YOU!