



**RICHMOND MEMORIAL HEALTH FOUNDATION**

Fostering an equitable and healthy Richmond Region

September 24, 2018

## **Diversity, Equity, and Inclusion in Nonprofits and Philanthropy:**

Promising Practices for Advancing RMHF Health  
Fellows' Recommendations

Report created for the

Richmond Memorial Health Foundation

**“Simply interacting with individuals who are [socially] different forces group members to prepare better, to anticipate alternative viewpoints and to expect that reaching consensus will take effort” (Phillips, 2014).**

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## Introduction

This report responds to the *2017 RMHF Equity + Health Fellows Report* recommendations that Richmond Memorial Health Foundation (RMHF) address issues of nonprofit and foundation diversity, equity, and inclusion through the following actions:

1. Model and support practices across different sectors that promote racial equity and improve health outcomes.
2. Invest in the development and participation of traditionally underrepresented community members to be decision-makers and leaders in fostering equity.
3. Be a catalyst for greater racial equity and inclusion in nonprofit hiring and governance in the region.
4. Advocate for federal, state, regional and local public policies that foster health and equity in the region.

The purpose of this report is to expand on these recommendations to communicate what is working to foster racial and other social diversity, equity, and inclusion (DEI) in nonprofit organizations, including foundations. To do so, we explore the academic and practitioner literature to learn from existing research and practice. We begin by providing definitions of “diversity,” “equity,” and “inclusion.” We then provide background on the relevance of DEI, selected statistics on diversity in nonprofits, and a synthesis of the literature related to DEI in nonprofit organizations, including benefits and potential costs and challenges. We close with a summary of promising practices and future considerations for the Richmond Region’s nonprofits and foundations.

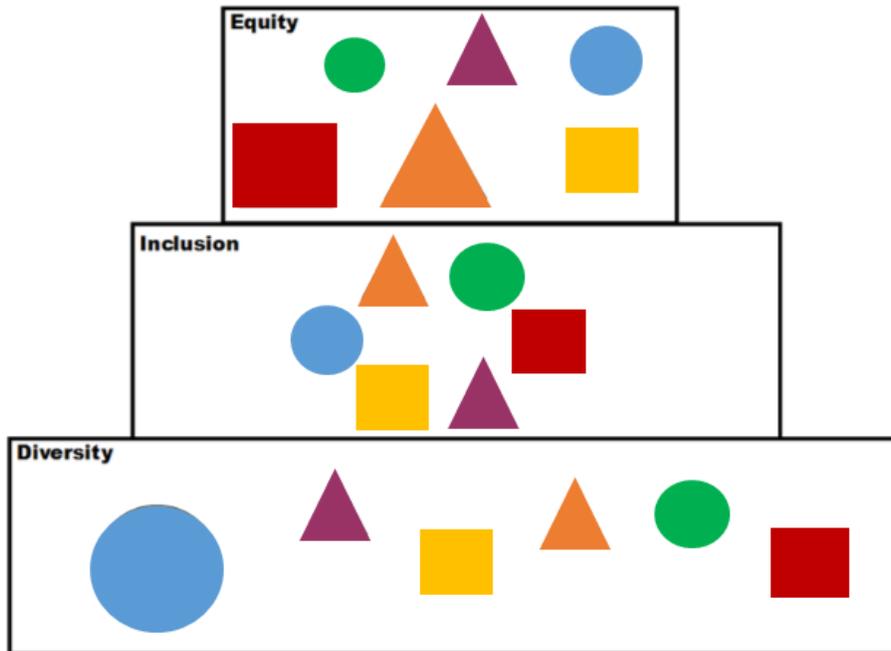
## Definitions

Numerous definitions exist for “diversity,” “equity,” and “inclusion.” For the purposes of this report, we use definitions that incorporate common elements from multiple sources.

- Diversity – The presence of and consideration for the multiple identities and differences (e.g. race, gender identity, sexual orientation, ability, socioeconomic status) of those engaged in all aspects of an organization’s functioning. (Sessler and Bilimoria, 2013; Weisinger, Borges-Mendez, and Milofsky, 2016).
- Equity – Equity moves from a framework of that which is “equal” to that which is “fair and just,” taking into account the historical discriminations and structural barriers that shape the experiences of specific groups or populations. In some instances, equity will lead to deliberately unequal treatment of groups for some very limited purposes (e.g. by favoring programs for those who have historically faced discrimination), as equal treatment would be unjust (Johnson and Svara, 2011; Norman-Major and Gooden, 2012).
- Inclusion – The extent to which a group’s behaviors, processes, policies and practices align to ensure diverse influences guide all aspects of an organization’s functioning (Chandler, 2016; D5 Coalition, 2013; Fredette, Bradshaw & Krause, 2016).

Significantly, these three states (DEI) are not independent or mutually exclusive. Diversity can occur without inclusion or equity, but neither inclusion nor equity can be achieved without diversity.

Figure 1 illustrates how DEI may manifest within an organization.



**Figure 1: Graphic representation of a diverse group whose members contribute to decision making in three modes: diversity, inclusion, and equity.**

The relationships represented in Figure 1 assume that, in any diverse group of individuals (shapes), the higher tier can only be realized when the tier below is achieved. In each tier, variations in member shape/size represent variations in a member's relative contribution to decision making, and the extent to which their perspectives are acted upon. Diversity is the base tier. A group comprised of members who represent varied identities and demographics is a prerequisite for inclusion. However, the presence of diversity does not guarantee that it is recognized or valued for informed decision-making; those with informal authority based on tradition or majority characteristics, and those with formal authority (e.g., employment rank or board member) may still assume more power. The middle tier, inclusion, is achievable when the group's processes ensure diverse influences in all aspects of an organization's functioning. The highest tier, equity, requires inclusion to succeed, but also realizes that equality is not always fair or just and that, in some

cases, the contributions and concerns of those without positional authority deserve greater consideration in order to reach optimal outcomes.

## Background

The call for diversity and inclusion in law, politics, and business has become progressively louder over the last decade. Government organizations first began considering DEI during the civil rights movements of the 1960s, as public administration began to recognize that current public policies heavily favored some citizens over others (Frederickson, 2005). In the 1970s, the historically white, male management structure of business shifted to respond to women expecting and deserving management positions and shared responsibility for the bottom line. It is interesting to note that business research on diversity and inclusion is the most robust among the three economic sectors, perhaps because business has had clear incentives to do so.

More recently, foundations have looked to grantees to increase diversity, equity and inclusion in their organizations. Nonprofit staff and boards are recognizing the realities of a changing, more demographically diverse workforce and customer base, and that diversity can function as a competitive advantage (Weisinger et al., 2016). Despite the attention, **nonprofit statistics, research, and practice suggest that the organizational integration of diversity, equity and inclusion is slow to occur.**

BoardSource's (2018) national survey of 1,759 nonprofit CEOs and board chairs, reported:

- 27% of 501c3 nonprofit organization boards and 40% of foundation boards report that they are 100% White.
- Most (73%) nonprofit executives were female. Most board chairs (67% for foundations and 59% for public charities) were male.
- People under 40 made up a small percentage of executives (9% for foundations and 13%

for public charities), board chairs (3% for foundations and 14% for public charities), and board members (9% for foundations and 18% for public charities).

**Further, there is a wide gap between what nonprofit CEOs say they believe about the importance of diversity for achieving their missions and the actual diversity within their organizations.** A Center for Effective Philanthropy (2018) survey found 70% of nonprofit leaders said it is important for staff to be diverse to achieve the organizations' goals, yet only 36% said their staff is very or extremely diverse. Similar findings emerged regarding board and senior leadership diversity.

There are no local studies for the greater Richmond Region regarding nonprofit diversity, equity, or inclusion. To gain a local glimpse, we reviewed board demographic diversity for 23 nonprofits that categorize their primary mission as "health care" in the GiveRichmond database, where organizations may voluntarily report board member race and gender. Findings suggest a large over-representation (85%) of white board members, but gender representation was close to even.<sup>1</sup>

In the following sections, we discuss (1) why DEI is considered important, (2) the ways in which integrating DEI can help advance nonprofit missions, and (3) potential costs and challenges.

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<sup>1</sup> Of 368 board members included in 23 nonprofits, 85% (313) are White, 7% (43) are African American, and less than 1.5% are Hispanic/Latino (6) or Asian American/Pacific Islander (5). Only one is Native American/American Indian, and none were categorized or reported as "other." The difference between males and females was less pronounced, with boards comprising 53% (206) males, 47% (168) females, and none reported as "other."

## Review of the academic & practitioner literature on nonprofit DEI

The assumed foundational values of IRS-sanctioned tax-exempt and tax-deductible 501c3 organizations and CEO survey responses about the importance of diversity, equity and inclusion invite an obvious question: Why do available statistics on nonprofit board and staff diversity indicate homogeneity? To answer this question, we review research that locates the benefits and challenges of change in diversity status among nonprofit organizations.

### *Why is DEI important?*

Diversity's historical roots are in the concept of "fairness" manifested as public policy through the Equal Employment Opportunity Act (EEO), which the U.S. implemented in compliance with the Civil Rights Act of 1964. In 1972, the influential Hudson Institute's Workforce 2000 report (Johnson, Packer, and Jaffe, 1987) shifted the value of diversity from fairness and compliance to improving management practices, specifically novel ways of managing the reality of changing workforce demographics.

Recent research emphasis on diversity in business and government organizations has continued to emphasize diversity's role in improving performance, though with somewhat mixed conclusions. In much of nonprofit literature, the underlying assumption for diversity is the social purpose of nonprofits: diversity as a moral imperative. A business case for diversity to improve organizational performance that sometimes appears in the nonprofit literature is the role that a diverse staff and board can play in reaching previously untapped markets (e.g., communities being served, new donors), or in creativity and innovation, especially in dynamic external conditions.

In addition to the elements of moral necessity, fairness, legal compliance, outreach, and performance noted in the nonprofit literature, considerations of DEI in the public sector and as the basis for public policy have received attention in Virginia during the past few years. Following a

violent white nationalist rally in Charlottesville, Governor McAuliffe created the Commonwealth Commission on Diversity, Equity, and Inclusion in August 2017, to examine the negative impacts of discrimination and to recommend public policy changes to make Virginia more inclusive (Office of the Governor, 2017).

As DEI continues to gain importance in the public arena, the nonprofits that are increasingly called on to implement public policy through service provision may have strong reason to incorporate DEI into their work as a form of accountability to advance their missions

*How can DEI help to advance nonprofit missions?*

Nonprofits operate with porous boundaries among a variety of stakeholder needs and expectations and one area of agreement among research studies in all sectors is that socially diverse groups are better than homogenous groups at both innovation and solving complex and non-routine problems. “Simply interacting with individuals who are [socially] different forces group members to prepare better, to anticipate alternative viewpoints and to expect that reaching consensus will take effort” (Phillips, 2014).

**Research on nonprofit CEO and board diversity in race, ethnicity, and other demographic categories is limited, but there is compelling evidence that integrating DEI advances nonprofits’ missions.** Brown (2002, 2005) found that resolving conflicting interests and goals of multiple nonprofit stakeholders (e.g. staff, volunteers, donors, clients) often requires that nonprofit boards identify creative ways to satisfy organization and stakeholder needs. Buse, Bernstein, & Bilimoria’s (2016) empirical analysis of board diversity in a sample of 1,456 CEOs of nonprofits whose missions included fundraising offers further insight about the value of board diversity. The study found that board governance practices are directly affected by board diversity, specifically gender and race. Boards with greater gender diversity had more effective governance practices and were more likely to have in place policies and practices related to diversity, which

is consistent with research on for-profit governance (Buse et al., 2016). Perhaps more importantly, the research identified that **the positive relationship between governance performance and membership diversity is only present when board members behave inclusively and have policies in place to foster equitable influence among all members.**

Research suggests board and staff diversity can lead to an expanded presence in the community, extending an organization's reach and impact. Diverse boards, particularly those with women members and/or younger members, tend to have higher levels of board member engagement, leading to increased participation in public policy advocacy (Lilly Family School of Philanthropy, 2018). Increased board engagement also may lead to higher participation in fundraising, which also extends the organization's reach and impact in the community (Lilly Family School of Philanthropy, 2018; Osili et al., 2018). **Grantmakers for Effective Organizations (GEO) (2018) points to the critical importance of DEI within grantmaking organizations, which tend to come from a position of privilege; incorporating DEI into their organizations fosters better use of funder privilege to enhance the communities they serve.**

In addition to attracting high-quality staff and board members, and building confidence and credibility within the community, a nonprofit's prioritization of DEI can help build trust and respect between board members and staff (BoardSource, 2018). By implementing DEI practices, a nonprofit more closely represents the community it serves, which may lead to increased efficiency and responsiveness, and enhanced outcomes for the community (Kapila, Hines, and Searby, 2016; The Denver Foundation, 2018; D5 Coalition, 2012).

Multiple studies have found that diversity and inclusion, and the resulting behaviors and contributions, lead to increased organizational creativity and innovation in education (Padamsee and Crowe, 2017), and workgroups of all kinds (Phillips, 2014). Further, organizations that integrate DEI are better able to attract staff and board members who are more skilled, diligent, and hard-working, leading to decreased turnover (Phillips, 2014; The Denver Foundation, 2018). Two

studies link DEI to essential performance indicators, including fundraising (Siciliano, 1996) and youth outcomes (Gooden, Evans, Perkins, Gooden, and Pang, 2018). Finally, a strategic equity focus may improve a nonprofit's effectiveness as it prioritizes resources and identifies service gaps in the community (BoardSource, 2018).

Weisinger et al. (2016) offer the most comprehensive review of nonprofit diversity and inclusion research, which is valuable here in numerous ways. For example, using the search terms “nonprofit inclusion” and “nonprofit equity,” the academic literature yields few useful studies, but the meta-analysis identifies a range of activities and concepts (e.g., heterogeneity, inclusiveness, representation) within the category of diversity, suggesting the apparent dearth of research may, in part, be due to semantics. The meta-analysis identifies three conceptualizations of diversity in nonprofit studies: equal opportunity employment, engagement of under-represented groups in organizational governance and operations, and understanding complex identities/avoiding stereotypes (intersectionality) (Weisinger et al., 2016). Much of the nonprofit research suggests diversity may be seen as a moral obligation to correct structural oppression, which is closer to the definition of equity that we employ here.

*What are the potential costs and challenges of integrating DEI?*

**Despite the benefits of integrating DEI into nonprofit missions and values, nonprofits may encounter real and perceived costs and challenges.** Organizational research has shown social diversity in a group can cause discomfort, a lack of trust, and lower communication (Phillips, 2014). **Building trust and improving communications takes time and additional resources, which organizations may not have, or may perceive as add-ons or distractions from the direct work of mission advancement.**

**Process is as important as practice.** In some instances, the way in which nonprofits

approach and allocate resources to DEI may not translate to increased opportunities for historically marginalized groups. To illustrate, Le (2015) describes a conversation that took place during a panel discussion about DEI:

*“...a colleague of color told me that someone contacted her, saying, ‘Can you help us spread the word about this new job position? We want to diversify our pool of candidates.’ My friend said, ‘I wanted to ask, are you trying to just diversify your POOL of candidates, or ACTUAL hires?’”*

In this case, the author and his colleague felt that the organization’s focus was on *appearing* to integrate DEI rather than on *actually* integrating DEI. The author goes on to describe how, in some instances, DEI is seen as a “feel-good” or trendy term with little substance. That begs the question: “Is this effort actually having an impact? Or are we wasting time?”

Similar applicant perspectives are reinforced by research findings that suggest ambitious employees of color feel they need more credentials than those who are White to apply for the same position (Thomas-Breitfeld & Kunreuther, 2014). The same study found that, without purposeful efforts to become more welcoming, organizational culture and assumptions within hiring processes may be perceived as structural or cultural barriers to diverse applicants.

Because the majority of nonprofits are small, another challenge of increasing DEI may be the perceived or actual added expense of diversity recruitment. **Collaborative local recruitment events among interested nonprofits, including foundations, will raise DEI awareness and increase accessibility for everyone.** Diversity recruitment (i.e., people of color, those without traditional degrees, people who identify as LGBTQIA, neighborhood leaders) includes reevaluating hiring processes to encourage diverse applicants by explicitly stating that employers encourage diversity; including interview questions related to cultural competency and local history; eliminating degree requirements; and examining whether the organization’s physical [and cultural]

environment is welcoming to applicants representing dimensions of diversity (Thomas-Breitfeld & Kunreuther, 2014).

**Nonprofits' many accountability requirements, tendency to be in persistent need of resources, and donor and board calls for "efficiency," often make organizations risk averse.** Le (2015) notes that the risk of failure inherent in integrating DEI into an organization can cause concern. Given that nonprofits are accountable for using funds effectively, **engaging in endeavors without a clear, substantive impact could risk donor perceptions of efficiency** (Le, 2015). In other cases, the organizational resources to promote DEI may not exist, even if the desire is there (Medina, 2017).

**A study of the unrealized impacts of DEI in education noted positive impacts as well as potential costs and challenges** (Padamsee and Crowe, 2017). A key finding was that staff members are more likely to feel that the organization for which they work is fair if the CEO or executive director is of the same race/ethnicity; thus, feelings of fairness among staff may change if the executive leader is of a different race or ethnicity. A second finding relates to the issue of distribution of power. As DEI within an organization increases, power dynamics may shift, causing internal conflict as some may have to share the power that they previously held. Padamsee and Crowe (2017) also note the dearth of data and evidence related to DEI, which resonates with our experience conducting this analysis.

## **Promising practices**

Based on a review of research and practice, understanding the organizational and geographic context of those engaged in furthering DEI is critical. By prioritizing contextual components, creating a process for advancing DEI that is action oriented, and fostering organizational cultures that value what change offers, increasing organizational DEI can contribute to advancing health equity in the Richmond Region. Processes and practices that show evidence of success

include the following:

**1. Take time to discuss, question, establish, and communicate shared expectations**

A key promising practice is communication of shared expectations by integrating DEI as a core organizational value in advancing the mission, rather than an initiative or intervention. Values convey centrality, endurance and sustainability, yet the reality is that existing definitions of diversity, equity and inclusion are inconsistent and the terms are understood and interpreted in many ways.

**A realistic beginning may be to promote inclusive, candid expression of what DEI means, how it will advance the mission, and what will and will not be targeted for change.** For example, street-level workers will not trade places in the organizational hierarchy with executive staff or board members anytime soon. Each organization will want to recognize, explore, and agree on relationships among individuals, roles, responsibilities, hierarchy, and authority. Equally important is each group member's trust in the process, willingness to question assumptions, and commitment to clear and transparent communication. Given that nonprofits operate with complex accountability requirements, **inclusive discussions about what DEI may and may not change will align and clarify expectations among individuals at all levels of the organization.**

Once agreement is reached, those engaged will want to agree on internal measures for holding themselves accountable within and outside the organization. Open exchange with communities served and flexibility in responding to priorities expressed by community members (Patton, 2002) may mean **working in new ways--outside of prescribed practices or making significant changes in organizational behavior and, most importantly, culture.** Similarly,

ensuring that community members are influencing the work that affects their lives requires making that part of someone's job or adding internal processes for participation among those served.

**Shared expectations about equity may be the most challenging of the DEI concepts, yet in theory, they flourish in diverse, inclusive organizational cultures.** Because achieving equity requires that those with less privilege or power engage from different vantage points, two points to consider early are: (1) the viability of increasing influence on decision-making among non-executive staff and those whose communities are served; and (2) assessing equitable pay practices. To illustrate the latter, an organization could begin by determining what is considered to be equitable pay and other forms of remuneration between those who earn the least and those who earn the most in the organization. If the ratio of most to least is 10%, the CEO who makes \$300,000 per year can justify paying the lowest paid, salaried employee \$30,000. If the ratio is 20%, the lowest paid employee's pay increases to \$60,000 (or CEO pay drops to \$270,000).

Another area to consider equity is within the scope of work-life policies and programs available to staff across the organization. For outreach, many human-service and health agencies depend on non-professional field-based staff, as their life experiences lend them credibility among those being served. However, health insurance, dependent care services, flexible work arrangements, and leave-time options often are not offered to non-professional and part-time workers. Gould, Austin and Whitebook (2017) detail the profound DEI consequences of wage and benefit disparities, noting that nearly half of Virginia families, including most childcare workers, cannot afford childcare.

## ***2. Increase DEI through hiring, and adapt for organizational size***

Given that diversity precedes inclusion and equity, an inclusive, candid assessment of

how an organization considers diversity in board and staff composition and where it is today is an early-stage promising practice. Organizations should identify what dimensions of diversity they want to prioritize based on their current staffing and governance. For example, a White physician and an African American attorney bring racial diversity, but together may offer less economic, educational or other form of diversity than a person who works in a trade.

Increased diversity within organizations can be achieved in a variety of ways. For example, organizations may begin with targeted recruitment of people who identify as LGBTQIA, differently abled, older, or of color. A successful strategy for finding diverse candidates who may not be nonprofit insiders may include looking to affinity groups (e.g., gender, race, or ethnic-oriented membership associations, such as the Hispanic Chamber of Commerce), religious organizations, civic groups, temporary job pools, job-training or recovery programs (e.g., Richmond Office of Community Wealth Building), and universities and colleges (including community colleges), as most have student and faculty affinity groups aligned with demographic categories. Similarly, benefits such as “inclusive” health insurance (see, for example, [healthcare.gov/transgender-health-care/](https://www.healthcare.gov/transgender-health-care/)), maternity and paternity leave, and flex-time encourage diversity. Though recruitment may begin on a smaller scale, efforts can snowball. For example, Kanter’s (1977) study of business found that, once there are three people who identify similarly within a working group, a “critical mass” attracts and engages diverse others.

Given the relatively small size of most nonprofits, diversity recruitment, done well, will take time. To diversify the nonprofit workforce pipeline and open opportunities for leadership, nonprofits may also want to: look for employees in similar roles in business or government; promote college scholarship opportunities; collaborate with local efforts to transition people into the workforce; employ high-school interns; engage youth in generating ideas for change; or support current employees’ through coaching, mentoring, and efforts to gain formal credentials (e.g., undergraduate or master’s degrees or skill-based certificates). It is important to note that even when

aspiring leaders of color have the same credentials as their White counterparts, candidates of color consistently express the need for additional credentials just to be considered for top-level jobs (Thomas-Breitfeld & Kunreuther, 2014). Parallel efforts to integrate DEI as a priority in hiring, as organizations shift emphasis or current employees and board members transition, will shape future recruitment tactics and selection criteria. Finally, by hosting collaborative DEI learning opportunities among a number of smaller organizations, changes may be more affordable.

Another challenge of small organization size may be the perceived or actual added expense of diversity recruitment. **Collaborative local recruitment events among interested non-profits, including foundations, will raise DEI awareness and increase accessibility for everyone.** Diversity recruitment (i.e., people of color, those without traditional degrees or identify as LGBTQIA, neighborhood leaders) includes reevaluating hiring processes to encourage diverse applicants by explicitly stating that employers encourage diversity; including interview questions related to cultural competency and local history; eliminating degree requirements; and examining whether the organization's physical [and cultural] environment is welcoming to applicants representing dimensions of diversity (Thomas-Breitfeld & Kunreuther, 2014).

#### ***4. Employ DEI training and education, and recognize that they are not sufficient***

A common approach to advancing DEI in organizations is through education, including workshops, seminars, and diversity training. However, there is no clear evidence that the value of this training advances DEI. In fact, diversity training may enforce stereotypes (Weisinger et al., 2016). Research also raised important questions about whether the concept of diversity training may further stereotypes about forms of diversity (Weisinger et al., 2016). For example, do those conducting the training know more or better, given that those being trained are often those at the street level working closely with clients? Who is more likely to understand the negative consequences of being excluded (Weisinger et al., 2016)? Deeper questions about assumptions point to organizational culture.

**Inclusion will primarily be achieved through organizational culture**, which is a complex, abstract, and highly influential concept. Leadership scholar, Edgar Schein (2010), defines culture as “the pattern of shared basic assumptions learned by a group as it solved its problems of external adaptation and internal integration.” Beyond hiring diverse staff, offering training and enacting equitable policies, the individuals who comprise organizations (“stakeholders”) will ensure shared influence. In a study of business, learning sessions about “normative assumptions about organizational strategies, functions, operations, practices, and procedures” among minority and majority group members and across job hierarchies advanced DEI (Lorbiecki, 2001, p. 353). Organization-wide learning in this manner opens participation to everyone and recognizes that those who have historically been excluded have much to offer those who are able to participate in influencing decisions. Those with influence may decide to set aside their opinions about what is best and instead ask those who will be most impacted by interventions or funding decisions for their perspectives.

##### ***5. Engage grantmakers in advancing DEI***

Grantmaking organizations seeking to promote DEI may start with a review of diversity among a larger sample of local nonprofits, to learn whether organizations perceive a benefit to DEI and, if not, why not? Given that organizational change is disruptive and achieving DEI requires long-term, targeted investments, another early consideration for grantmakers is whether current staff and board have the will to work internally, the capacity to set aside funds for DEI, or the authority to make long-term commitments. **With assurance that there is external momentum to change and internal shared commitment to values, time, and money, foundations are in position to lead the advancement of DEI.**

Foundations employ a variety of strategies to promote DEI, ranging from sponsoring and hosting collaborative training and events about DEI to substantial, long-term, financial investments. Currently, many foundations require grantee diversity demographic reporting, but some

use grantmaking as an equity strategy. Providing health information for communities that may not have access, providing primary and specialty care, meeting basic needs, engaging community members in conversations on promoting health, and creating programs that target social determinants of health, are framed as equity investments. For example, the New York Community Trust recently provided \$600,000 to increase access to healthy food in three Bronx neighborhoods with an end goal of promoting health, while the Gulf Research Program and Robert Wood Johnson Foundation recently partnered to build healthier communities in Alabama and Louisiana by bringing together researchers, practitioners, and community members for conversations about social, cultural, and economic issues. In Texas, the Hogg Foundation for Mental Health provided funding to medical schools and nonprofits to address social determinants of mental health such as income, literacy, and race/ethnicity. Health Leads, a Boston-based organization, has found success in promoting community health by promoting access to food, health insurance, and transportation. (Grantwatch, 2018). Others prioritize grant requests from applicants that have historically faced discrimination. The Maine Health Access Foundation (2018), for example, launched a program that specifically funds organizations led by people of color and others who are underrepresented.

#### **6. *Start small, continuously collect data, and track changes to learn and adapt practice***

Key academic research and practitioner experience stress the importance of beginning where an organization is today, regardless of DEI status. **Starting small and creating incremental change, along with initiating an ongoing method for gathering candid feedback, can promote learning about the intended and unintended consequences of implementation and foster adaptations, as needed.** The D5 Coalition's early work in DEI suggests that integrating data collection regarding "policies, practices, and realities" is challenging, but can lead to increased equity within the organization and for those it serves (Marrow, 2018).

Quality metrics and useful tools for achieving equity are available. The City of Seattle and

the Haas Institute’s broad-based approaches offer tested methods and measures which can be implemented by RMHF and other nonprofits and foundations going forward. The Haas Institute’s Equity Metrics program develops research-based metrics to enhance understanding of “group-based marginality and structures of opportunity” (Haas Institute, n.d.). The City of Seattle’s Race and Social Justice Initiative, which began in 2005, offers a toolkit of tactics that are embedded in Seattle’s public decision-making (Government Alliance on Race & Equity, 2018). Guidestar offers free organizational DEI tools and resources based on the work of the D5 Coalition.

### ***7. Collaborate across sectors with other organizations engaged in advancing DEI***

While most existing research focuses on organizational DEI, organizational momentum and timing also may be right to collaboratively advance the Fellow’s fourth recommendation, “advocate for policies at the federal, state, and local levels that promote equity in the region.” Longstanding public policies and choices, especially those created to ensure segregation, are the basis of many of the health disparities that exist in the Richmond Region today.

### ***8. Recognize DEI is a long-term change strategy that will face challenges***

Arguments about whether elites or a plurality will best inform decisions that affect the public, date back to ancient Greece, and most people are likely to have an opinion on this topic today. While most evidence suggests there are broad-based benefits of integrating DEI into a nonprofit, there also may be costs and challenges. Identifying clear links between DEI and mission advancement may help nonprofits face and go beyond the real and perceived challenges they encounter while integrating DEI. Additionally, iterative, learning-focused evaluations that yield adaptations along the way and illustrate progress, will help to keep organizations moving forward. Given the complexities of individual, organizational, and public change, everyone who embraces the promise of DEI will want to be mindful of their past and current landscape, so that aspirations for DEI foster shared commitment in intent, strategies, and actions.

## Conclusion

In closing, the evidence suggests that there are five areas to consider in creating diverse, inclusive, equitable nonprofit organizations:

1. Begin by assessing an organization's present state, develop a clear and flexible plan for establishing change, and agree on a method for recognizing what is working;
2. Question assumptions about diversity and ensure representation without assuming that individuals are only able to represent a single group (i.e. consider intersectionality). Diversity, thoughtfully conceived, forms the foundation for developing inclusion and equity.
3. Embrace DEI as an organizational value that is central to culture, rather than as an evaluation of whether the organization "is" or "is not" diverse;
4. Start with what you have, and be realistic, optimistic, and ambitious. Individuals do not need organizations to change the way they behave. Even without formal board and organizational commitment to DEI, people have abundant opportunities to move DEI forward by enlarging their networks and questioning in respectful ways.

## Limitations & future areas of study

With the exception of a few references, the research reviewed to develop promising practices was conducted or practiced within nonprofit organizations. This is both a principal value and a limitation. As stated, the most robust diversity, equity and inclusion research is on business organizations, which rely heavily on incentives to generate change. Alternatively, nonprofit research largely assumes that motivation, a fundamental precursor for organizational change (Schein, 2010), will come from nonprofits' social purpose. This begs the question, why is the nonprofit sector the last of the three sectors to embrace DEI? Organizational change is more likely

to succeed if it is framed, at least in part, in the perspectives of those being asked to engage in the work. This may be worthy of exploration moving forward.

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