diversity

IN ACTION

BOARDSOURCE®
Building Effective Nonprofit Boards

TARGET.

CONTENTS

WELCOME TO YOUR "DIVERSITY IN ACTION" TOOLKIT

For more than two decades, BoardSource has witnessed the resiliency of the nonprofit sector. With each threat — whether natural disaster, scandalous headline, or new regulation — the sector has emerged with undeniable purpose and commitment to the future, led by the energy and intellect of its boards of directors.

Yet there is still much work to be done to ensure that the sector truly fulfills its collective, socially beneficial mission. In order to function at the highest level, nonprofit boards need to ensure that their members represent diverse points of view. And it is not enough to "diversify" a board; boards must be inclusive in their policies and practices, thereby creating a culture that encourages and nurtures diverse expression.

This toolkit comprises ideas and information geared to helping your board increase its diversity as well as adopt the inclusive policies and practices that will create the culture needed to sustain your organization's commitment over time.

The toolkit is based on resources in BoardSource's vast library of governance, material that has shown hundreds of thousands of nonprofit board members and other leaders how to develop sound practices. We have also called upon the wisdom of some of our partners with expertise in the field of diversity and are grateful for their permission to reprint their materials.

BoardSource has more than 25 years of unparalleled experience helping nonprofits tackle challenging situations. In addition to our publications and online resources, our consulting team of governance experts is ready to assist your board and may be reached via e-mail (consulting@boardsource.org) or by calling (877) 892-6273.

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Vice President, Programs & Chief Governance Officer
BoardSource

PART 1

BUILDING COMMITMENT TO DIVERSITY AND INCLUSION

com·mit·ment *n.*
devotion or dedication, to a cause,
person, or relationship

PART 1
INTRODUCTION

Cultural competence is the ability to understand, accept, respect, lead, work, and volunteer with people from other cultures and backgrounds. Cultural competence can be measured by the extent to which individuals and organizations can create and maintain an environment that is welcoming, equitable, and supportive of difference in the pursuit of common goals.

Developing cultural competence is an ongoing process that starts with recognition of the need and value of incorporating diversity, progresses to implementation of policies and practices, and continues with further refinement and understanding of the benefits of inclusive practices. According to the National Center for Cultural Competence at Georgetown University, it involves

- having a defined set of values and principles and demonstrating behaviors, attitudes, policies, and structures that enable people to work effectively cross-culturally

- having the capacity to value diversity, conduct self-assessment, manage the dynamics of difference, acquire and institutionalize cultural knowledge and adapt to diversity and the cultural contexts of the communities they serve

- incorporating the above in all aspects of policy making, administration, practice, and service delivery

In order to increase diversity and inclusion, the organization's leaders must build commitment. The board should understand, beyond general notions of what is politically correct, why cultivating an inclusive environment is important to the organization, the mission, and its constituents.

BoardSource's *Leading with Intent: A National Index of Nonprofit Board Practices 2015*, reveals some interesting information regarding board commitment to diversity and inclusion. While 74% of chief executives report that their boards have discussed the importance of expanding board diversity, 80 percent of board members remain White and only 56% have evaluated or modified their recruitment efforts specifically to reach members with more diverse backgrounds. Furthermore, while it is reassuring that 69 percent of chief executives report that they are dissatisfied or very dissatisfied with their board's racial/ethnic diversity, this figure is also disappointing, because 75 percent view it as the most important aspect of diversity for increasing their organization's ability to advance their mission.

Having a conversation about diversity and inclusion is a key step to understanding how the board feels about diversity and inclusion, its value, and its priority within the board and organization. It will also help the board identify potential obstacles that must be overcome in order to move forward and build commitment.

DISCUSSION POINTS

1. How do we define diversity?

2. Why is diversity important to us?

3. Have we had an open discussion about changing demographics in our community and how it affects our services, programs, and mission?

4. How might diversity and inclusion increase our ability to serve our mission?

5. What are the potential points of contention or resistance related to diversity?

6. Can our practices, traditions, or culture be perceived as biased or unwelcoming?

7. What, if anything, will we have to change in order to become more diverse and inclusive?

8. Is our chief executive committed to inclusiveness? If so, how has this been demonstrated?

9. Is the board committed to inclusiveness? If so, how has this been demonstrated?

10. As a board, what is our culture?

11. Are we welcoming to people with diverse backgrounds?

12. What are the elephants in the room?

TOOL 1

THE ROLE OF THE CHIEF EXECUTIVE

Demonstrated commitment of the organization's leadership is a cornerstone of successful diversity initiatives, which means the chief executive, in constructive partnership with the board of directors, has a distinct role to play.

In an inclusive organization

- the leadership recognizes and embraces the opportunities and challenges that diversity presents to the organization

- the leadership believes strongly in developing strategies that identify the assets and address the needs of diverse communities

- the leadership integrates an awareness of diversity and inclusion into virtually everything the organization does, thereby literally transforming the organization

DiversityInc, a leading publication on diversity and business, annually ranks the top 50 companies for diversity. Companies are judged on four key areas, with chief executive commitment being the most heavily weighted (the other three areas are human capital, corporate and organizational communications, and supplier diversity). Chief executive commitment, according to *DiversityInc,* examines the chief executive's involvement in diversity, how she/he holds executives accountable for diversity success and board of director demographics. Examples cited include tying bonuses and executive compensation to diversity goals and having the chief executive personally chair the diversity council.

If you think this only happens in the for-profit sector, think again. AARP debuted in the top 50 in 2009, its first year competing.

DISCUSSION POINTS

Consistent with the chief executive's role of leading the staff, engaging the board in planning, developing future leadership, and building external relationships, the chief executive should ask and answer these questions:

1. What am I doing personally to move diversity and inclusion forward?

2. Have we made a visible commitment to diversity and inclusion (e.g., on the website, in the mission statement, in organization communications materials)?

3. What information do we have about how we are perceived (external perceptions of the board or organization; internal perceptions among board members and staff)?

4. What barriers to inclusiveness do we need to address?

TOOL 2

The board, in constructive partnership with the chief executive, plays a critical role in setting the stage for success, monitoring progress, and ensuring results and accountability. Setting the stage includes creating a supportive environment for inclusion, publicizing the organization's efforts and commitment to diversity and inclusion, setting aside time on meeting agendas to discuss how the organization is fulfilling its diversity and inclusion commitment, and encouraging all board members to be active participants in training and board member recruitment.

DISCUSSION POINTS

As the governing body with shared purpose, authority, and accountability, the board should take time to consider whether — and to what extent — it will

1. make regular public statements of the organization's vision and philosophy of inclusiveness

2. make diversity a top objective for the entire organization

3. help create a pipeline of diverse, skilled individuals to fill vacancies on the board

4. encourage ongoing education to foster inclusiveness and cultural competence

5. monitor retention rates

6. conduct exit interviews of board members to further assess progress related to inclusiveness

7. administer board self-assessments that include questions related to diversity strategies and goals

8. create shared experiences with informal social time together

TOOL 3

DIVERSITY AND INCLUSION STATEMENTS

Inclusive organizations value diverse perspectives, opinions, and approaches and view these as assets to be incorporated into the fabric of the organization. Some will buy into the need to develop a diverse and inclusive environment based on personal values. Others may require assistance to envision the difference it will make and the impact on the organization. Developing the organization's diversity and inclusion statement is an important step in integrating diversity and inclusion as an organizational value.

The diversity and inclusion statement is a public declaration of commitment to welcome employees, board members, vendors or collaborators, and any other individuals who — regardless of their background — help make the organization friendlier and more effective in meeting its goals. Going through the process of drafting and articulating how diversity and inclusion affect the mission and developing the business case for becoming a culturally competent organization help build understanding and buy-in and increase the likelihood that diversity will not be just an afterthought.

The board might start by answering the discussion questions in the previous Tools. Understanding why diversity is important to the board, the organization, and the mission and having clarity about what the board and the organization want to achieve through diversity and inclusion will help the board articulate its rationale and commitment to becoming an inclusive organization.

The following is an example of a diversity and inclusion statement.

THE HYAMS FOUNDATION: STATEMENT OF DIVERSITY PRINCIPLES

Diversity refers to individual and group differences based on race, ethnicity, gender, sexual orientation, age, physical ability, class and religion. The Foundation seeks to promote understanding and appreciation of these differences in order to eliminate racism, bigotry, and other forms of intolerance and to build a more humane and just society.

The Foundation promotes diversity within its own organization and those it funds in order that they

- reflect the racial, ethnic, and other characteristics of those living in the communities served

- promote greater understanding of and respect for the diversity within these communities

- recognize and amplify these communities' "voices"

- build on the strengths of community residents and develop local leadership

- achieve the highest level of effectiveness and well informed decision making

The Foundation will advance these goals by

- promoting diverse boards and staff

- improving access for all those needing the programs and services funded by the Foundation

- supporting self-development efforts of traditionally oppressed groups to become equal participants in society

- funding specific efforts that deal with race relations

- funding specific efforts that promote leadership development and build the capacity of neighborhood residents and organizations to solve their own problems

- actively seeking to be informed by the community

- having a visible presence in the community

- advocating for diversity in the world of philanthropic decision making

The Foundation has found that success in achieving diversity requires commitment from the leadership of an organization at both the board and staff levels. This commitment must extend over time, with an understanding that there are no "quick fixes" to the lack of diversity. Achieving diversity is an ongoing process which the Foundation believes will lead to a more pluralistic and economically productive society.

Reprinted with permission of The Hyams Foundation.

TOOL 4

Time	Agenda Item	Lead	Supporting Materials
5 minutes	Welcome, call meeting to order	Board Chair	
5 minutes	Introduction of new members, guests	Board Chair	Bios
10 minutes	Introduction of discussion topic — Why Diversity and Inclusion are Important to XYZ Organization — and ground rules 1. Active participation that allows everyone a chance to contribute to the conversation 2. Create a safe environment for discussion and learning 3. Treat as confidential any information that is shared 4. Extend courtesy to others 5. Listen without judging others 6. Share challenges openly so that we can learn together and develop better ways of doing things 7. Be present in the moment	Governance Committee Chair or Task Force Chair	
90 minutes	Facilitated Discussion Points 1. How do we define diversity? 2. Why is diversity important to us? 3. Have we had an open discussion about changing demographics in our community and how it impacts our services, programs, and mission? 4. How might diversity and inclusion increase our ability to serve our mission? 5. What are the potential points of contention or resistance related to diversity? 6. Can our practices, traditions, or culture be perceived as biased or unwelcoming?	Governance Chair, Task Force Chair or Discussion Leader	• Staff demographics • Board demographics • Community demographics • Mission and values statements

	7. What, if anything, will we have to change in order to become more diverse and inclusive? 8. Is our chief executive committed to inclusiveness? If so, how has this been demonstrated? 9. Is the board committed to inclusiveness? If so, how has this been demonstrated? 10. As a board, what is our culture? 11. Are we welcoming to people with diverse backgrounds? 12. What are the elephants in the room?		• Board Diversity in Action assessment results
5 minutes	Next Steps • Appoint taskforce • Notes to board on consensus points, unresolved issues	Board Chair	
5 minutes	Adjourn	Board Chair	

PART 2

BOARD CULTURE AND DYNAMICS

cul·ture *n.*
a particular set of attitudes that
characterizes a group of people

dy·nam·ics *n.*
the forces that tend to produce activity
and change in any situation

PART 2
INTRODUCTION

In the book *Culture of Inquiry,* author Nancy Axelrod writes:

> A board's culture consists of a combination of formal and informal rules, agreements, and traditions that have developed slowly and unconsciously over time. As leaders, board members often set the tone for organizational culture. For diversity and inclusion, this means the board must walk the talk.

The four pillars of an inclusive board culture are trust, information sharing, teamwork, and dialogue.

TRUST

In an inclusive board, board members rely on each other and trust they are appreciated for what they contribute to the group's work. This type of trust must be nurtured by

- ensuring decisions reflect the collective leadership of the group

- helping board members get to know each other

- creating conditions that support candor and consensus (board members are able to voice their viewpoints; they feel that other board members understand their viewpoints; board members support decisions because they are made in an open, fair, and inclusive manner)

INFORMATION SHARING

In an inclusive board, all board members have equal access to information. Additionally, they have a willingness to hear opposite views, which is a key to wise decision making. This includes allowing board members to share their differing views without feeling they are judged and being ostracized.

TEAMWORK

In an inclusive board, every member is an asset. They are intentional about setting expectations that are equal and fair for all board members regardless of background, and they continuously draw on the multiple perspectives in the room.

DIALOGUE

In an inclusive board, all opinions are welcome without reservation. Dialogue requires listening to understand others' viewpoints and a willingness to share your own. The more diversity of opinions and backgrounds the board possesses, the better foundation it has for sound decisions.

While rich communication dares to discuss the elephants in the room, divergent views are explored in a respectful rather than adversarial manner. In instances when disruptive behavior is exhibited, the board chair (and individual board members) must remind the group of agreed upon ground rules and norms — individuals can attack the issues, not each other. The chair should also monitor and adjust the flow of conversation to ensure all board members have an opportunity to speak. This may be challenging for some, but practice makes perfect. Willingness to make things better must be part of board's constitution on all accounts.

DISCUSSION POINTS

1. Are new members easily integrated into our board culture?

2. Do we provide opportunities for board members to get to know each other better and learn what makes everyone tick?

3. Are we clearly articulating the code of conduct for the board, and does it distinguish between appropriate and inappropriate behavior?

4. Do we have clear expectations spelled out for each team member?

5. Can we all manage not to take our colleagues' comments personally?

6. Do we have a process to deal with private agendas?

7. Do board members feel comfortable to ask additional questions if they do not understand something?

8. Is our chair able to capture all opinions on an issue?

9. Do we hear all points of view before making decisions?

10. Do we have a way to remove road blocks and find a consensus when that is needed?

Adapted from Culture of Inquriy: Healthy Debate in the Boardroom *by Nancy R. Axelrod. BoardSource, 2007.*

THE POWER OF DIVERSITY IN THE BOARDROOM

TOOL 5

One of the most commonly cited benefits of diversity and inclusion for nonprofit boards of directors and trustees is better deliberations, as a result of bringing varied opinions and perspectives to bear on the issues confronting the organization. By contrast, a homogeneous board is prone to an inherent near-sightedness and the perils of "groupthink."

CONDITIONS THAT FOSTER GROUPTHINK

The lack of authentic probing dialogue is sometimes the result of groupthink, described by research psychologist Irving Janis as "a mode of thinking that people engage in when they are deeply involved in a cohesive in-group" and when "the members striving for unanimity override their motivation to realistically appraise alternative courses of action." Conditions that directly contribute to groupthink include

- homogeneity of members' social background and ideology — as frequently happens when board openings are filled by friends or colleagues of existing board members

- insulation of the group from outside sources of information and analysis — a common situation when the staff controls nearly all information flowing to the board

A central tenet of groupthink is that the group, as it seeks conformity and unity, will sacrifice everything in order to lower conflict and maintain peace — causing poor decision making. No one wants to rock the boat by asking unpopular questions or challenging apparent consensus.

Having a diverse board requires open-mindedness, curiosity, acceptance, and responsiveness, which can ultimately facilitate understanding and willingness to work together. Indeed, diversity is accompanied by complexity and intensity, especially when traditional ways of doing business are challenged. This clearly is not the easiest way to get a group to make decisions, but the benefits far outweigh the alternative.

DISCUSSION POINTS

1. Do we seek out and genuinely appreciate varying opinions on important issues?

2. Do we disagree with, challenge, and question one another in the spirit of making great decisions?

3. Do we consider issues related to race, ethnicity, age, socio-economic status, etc., when setting policies? What are some examples of when this has or has not occurred?

4. Do we understand and connect with the organization's constituency?

5. How is our culture perceived by outsiders?

6. What benefits will be gained by becoming more inclusive?

7. What opportunities might be lost if we remain exactly the same?

TOOL 6

Cultural competence is the ability to understand, accept, respect, lead, work, and volunteer with people from other cultures and backgrounds. Cultural competence can be measured by the extent to which individuals and organizations can create and maintain an environment that is welcoming, equitable, and supportive of difference in the pursuit of common goals.

1 Not Knowledgeable	3 Somewhat Knowledgeable
2 Minimally Knowledgeable	4 Very Knowledgeable

_____ I acknowledge my personal values, biases, assumptions, and stereotypes.

_____ I am aware of my own cultural identity and recognize how culture affects my personal interactions.

_____ I can appreciate the ways diversity has benefited and enriched my life experiences.

_____ I recognize the advantages and privileges in our society, and I can see and articulate areas of disadvantage faced by others.

_____ I am aware of the cultural barriers and issues faced by colleagues and peers in my workplace.

_____ I am comfortable being with groups different from my own. I am able to embrace different values and points of view.

_____ I know how to respond to inappropriate comments.

_____ I know how to respond to individuals who think cultural competence is a waste of time.

_____ I recognize and know how to respond when people avoid or deny that race and gender problems are issues.

_____ I am comfortable discussing cultural competence and diversity.

_____ I know how to be an effective role model and how to "walk the talk" by demonstrating commitment and support for developing cultural competence and encouraging diversity initiatives.

_____ I am sensitive to and respectful of clients and colleagues who identify themselves as culturally diverse.

_____ I support expanding access to opportunities and power to all groups.

_____ I am capable of identifying cultural competence implications and strategies in areas of my work.

_____ I am able to use mistakes as learning opportunities.

_____ I have strong cross-cultural communication skills.

_____ I can listen and respond in a non-defensive manner.

_____ I can respond effectively to issues of privilege and prejudice.

_____ I can recognize and work effectively as a change agent with people who are uncomfortable about interacting with people whose life experiences and cultures are different from their own.

_____ I can help people from different cultural backgrounds connect, work together, and build mutual trust and understanding.

_____ I am knowledgeable about institutional racism, sexism, religious discrimination, and other types of oppression.

_____ I recognize the impact of hiring and employment practices and policies on people of color, women, those with disabilities, and people with different sexual orientation.

_____ I am aware of the cultural variables that affect cross-cultural interactions and cross-cultural teamwork.

_____ I understand demographic trends and their impact on the workplace.

_____ I am familiar with the current literature and resources on cultural competence and diversity.

_____ I know what internalized oppression is, how it shows up, and how it affects individuals and groups of people.

_____ I understand how racism, gender bias, classism, language bias, age bias, prejudice toward those with physical or mental challenges, and other forms of bias affect the daily lives of the targeted people, both in the workplace and in daily life.

_____ I understand the difference between affirmative action and valuing diversity and the concept of being culturally competent.

Add the points you assigned to each item. Total Points: _____

Scoring:

1-28   Not Knowledgeable

29-56   Minimally Knowledgeable

57-84   Somewhat Knowledgeable

85-112   Very Knowledgeable

PART 3

RECRUITING AND OTHER PRACTICES TO ENSURE DIVERSITY AND INCLUSION

re·cruit *v.*
enroll somebody as a worker or member

PART 3
INTRODUCTION

There is truth to the saying, "Actions speak louder than words." If your organization says it is committed to diversity and inclusion, what do your actions reveal about your intent? Further, are your actions designed to produce results?

Intentional practices in recruitment, orientation, board training, tracking and accountability are routinely cited as critical to the success of diversity and inclusion initiatives. As you build or strengthen existing practices, consider the following discussion points.

DISCUSSION POINTS

1. Who will guide our efforts (e.g., advisory committee, task force, governance committee)?

2. What barriers to inclusiveness do we need to address and what information do we have about how we are perceived (external perceptions of the board or organization; internal perceptions among board members and staff)?

3. Does the structure of our board (i.e., length of terms, criteria for serving, board member turnover) lend itself to developing inclusiveness?

4. What external resources might be useful as we move forward?

Has your organization or board done the following?	Yes	No
Incorporated diversity into the organization's core values.	62.9%	37.1%
Modified organizational policies and procedures to be more inclusive.	55.8%	44.2%
Conducted diversity training for staff.	45.5%	54.5%
Conducted diversity training for board members.	12.1%	87.9%
During the past year, have any board members talked to you about non-inclusive practices or offensive behaviors that occurred during board events?	6.4%	93.6%

BoardSource Nonprofit Governance Index 2010

TOOL 7

PUTTING YOUR GOVERNANCE COMMITTEE TO WORK

Many boards struggle to cultivate relationships with potential board candidates beyond their traditional social and professional networks. A diverse pool of excellent candidates, however, may be closer than you think. Consider, for example, the experience of a governance committee that repeatedly tried to build a diverse pool of candidates for board membership without success until it became apparent that they all knew and were approaching the same individuals. With this revelation, they invited representatives from community groups and constituents to the governance committee meeting, articulated the future direction and priorities of the organization, and then strategized with these individuals to successfully identify new prospects for the board.

CULTIVATING TIPS

- Involve a wide range of people in the cultivation process, including board members, senior staff, major donors, and other constituents.

- Invite prospects to participate in some way in support of the organization.

- Keep records of individuals who might be potential board candidates in the future.

- Continually develop a pool of potential board members.

WHERE TO FIND SUGGESTIONS OF GOOD BOARD MEMBERS

Colleagues

Board members of other nonprofits

LinkedIn Board Member Connect

Articles and reports in the local media

Chief executive and other senior staff

Board members

Volunteer centers

Local leadership programs

Current volunteers

Current advisory council members or task force members

Whom to Consider for Board Membership

Community leaders

Executives of local or national corporations

Owners of small businesses

Individuals in professions related to the organization's mission

Current and prospective major donors

People who have benefited from the organization's services, or their relatives

Current or past volunteers

People who have an affinity for the mission

Where to Look for Prospective Board Members

LinkedIn Board Member Connect

Religious institutions and congregations

Major corporations' outreach programs

Trade, professional, and fraternal associations

Local businesses

Organizations representing racial and ethnic groups

Local colleges and universities, community colleges

Electronic databases (www.guidestar.org, www.boardnetusa.org)

Hobby centers, clubs, community centers

Questions the Governance Committee and Board Should Ask

- What constitutes a balanced board for our organization in terms of member skills, experience, capacity for philanthropy, commitment, and demographic considerations (e.g., ethnicity, gender, geography)?

- Does the size of our board provide enough different perspectives for discussions and analysis while enabling all members to actively engage in our work?

- Is the governance committee active throughout the year identifying and recruiting the best possible prospects for election?

- Do we have policies, such as term limits, and procedures that ensure adequate turnover and renewal on the board?

- How does our board gauge the potential contributions of its members and tap them for the greatest benefit to the organization?

TOOL 8

MENTORING

Savvy nonprofit boards are following the lead of their private sector cousins and utilizing mentoring as a means for orienting new members, promoting individual and organizational learning, and preparing for leadership succession. Further, mentors are being assigned to new board members as an inclusive practice for socializing them to the culture of the board.

Mentoring partners can meet virtually and/or in person prior to and after board meetings during the first year of board service. The board mentors welcome the new board members into the "organizational family" by introducing them to the people, issues, and work of the organization, and they serve as go-to people and sounding boards. As mentors get to know the new board member, they might confer about how to best utilize the mentee's time and talent and enhance his or her board experience.

PROMOTING ONGOING INDIVIDUAL AND ORGANIZATIONAL LEARNING

Peer mentoring is a powerful tool for board education because it engages people and harnesses the collective power of the board. It has the added advantage of facilitating more trusting and meaningful board member relationships, building board cohesion, and ultimately contributing to the level of shared understanding that promotes more informed decision making.

THE POWER OF MENTORING

Board members share remarkable stories that speak to the power of mentoring. They can't imagine not having a go-to person to answer questions, bounce ideas off of, and help sort out organizational puzzles. They feel more comfortable more quickly because they have established meaningful relationships. And because they are able to grasp the big picture faster, they are able to make meaningful contributions to their boards sooner.

To build, grow, and support a viable board mentoring culture, you should do the following:

• Establish concrete learning objectives and long-term goals that you can measure and celebrate.

• Secure visible support, involvement, and commitment from the highest levels of the board and staff. Involve the governance committee in developing, implementing, and evaluating the program.

• Determine how you will pair mentors and mentees (this will depend on your goals and learning objectives). Consider involving both staff and board members as mentors. When necessary, be willing to look outside your organization for mentors; for example, your governance committee chair might ask a governance committee chair in a sister organization to be his or her mentor.

MENTORING DOS AND DON'TS

- Do establish points of connection early on in the relationship. Don't assume that because you serve together you know each other.

- Do identify and utilize multiple venues for communication. Don't rely on face-to-face interaction alone.

- Do set a regular contact schedule, but don't be inflexible.

- Do check regularly on the effectiveness of communication. Don't assume that the messages you are sending are being received or understood.

- Do talk about the effectiveness of the mentoring process. Don't forget to evaluate learning progress.

Excerpted from "Mentor Your Way to Board Development" by Lois J. Zachary. Board Member®, *May/June, 2008.*

TOOL 9

Getting new board members actively involved early on can build on the momentum of the orientation and tap into their initial enthusiasm. Board members need to be engaged with important work on the board in order to have a stake in it. Without a stake, board service will be uninspired and pro forma.

Experience and research tells us that board members want and need to feel a personal connection to the organization and its services. Board members don't want to feel as though they are just window dressing or there to meet a quota.

Inspiration for active engagement also comes from connecting one's own hopes and aspirations with the board's activities. Board leaders need to try to link board members with activities that will help them achieve their own goals as well as those of the organization. Such linkage takes place in board meetings, in committee and task force work, and in individual assignments. This means that board chairs and chief executives need to get to know board members in order to make appropriate use of their skills. What was it that made new members say yes to board service? What are they hoping to gain in return for the time and effort they will be expected to expend?

WHAT NEGATIVELY INFLUENCED YOUR BOARD EXPERIENCE?

"Being reminded, most often in subtle ways, that I was not a 'heavy-hitter'... that is, what I brought to the table was diversity, not prestige, skills, resources, or connections of substance."

"Being treated as the diversity member instead of simply a member of the board."

"The greatest negative influence affecting my nonprofit experience was to be marginalized because I was the only 'token' minority board member."

Source: Vital Voices: Lessons Learned from Board Members of Color. *BoardSource, 2009.*

DEVELOP THE BOARD AS AN INCLUSIVE TEAM

Building an effective board means building and developing a team composed of the diversity of perspectives, expertise, and other resources needed to accomplish the mission. However, it is not enough to recruit a diverse board. The board must become a cohesive unit that makes use of what every board member can offer. Such boards are well positioned to enable creative thinking, innovation, and problem solving and to provide leadership in meeting organizational challenges and identifying new opportunities. The more diverse the board, the more important it is to nurture understanding by creating opportunities for social and interpersonal interaction.

There are two caveats to creating an inclusive board: Avoid tokenism and manage differences of opinion.

Creating a sense of ownership is difficult if board members feel they were recruited purely to represent a part of the constituency. Board members and senior staff must learn to make use of all of the abilities and expertise present among members of the board, not be side-tracked by the visible signs of difference represented by ethnic and generational identities.

To avoid tokenism, treat each board member equally. Involve new members right away and assign them tasks that are independent of their cultural or ethnic background. For example, refrain from turning to the sole Asian board member only when questions come up that relate directly to the Asian community. He or she should be asked to address general questions posed to the board as well as questions related to his or her special expertise — which may or may not have anything in particular to do with the Asian community.

A natural byproduct of inclusiveness may be wider disagreement among members, which is not necessarily easy to deal with. In her article "Inclusion: Encouraging Participatory Governance" in *The New England Nonprofit Quarterly,* Zora Radosevich suggested that inclusiveness means not only bringing in new and different people, but supporting people who say new things and being willing to be uncomfortable while working toward an understanding. With the board chair as moderator, the board needs to cultivate an atmosphere of acceptance by encouraging wide-ranging opinions and molding them into creative solutions. By exploring a variety of perspectives and options, the board is more likely to make effective decisions. For example, the board of an organization dealing with workforce development issues may need to wrestle with the differences between the perspectives of employers and union members. Actions that are taken based solely on the perspectives of one of these groups are likely to be unrealistic and ineffective. Each group's opinions may vary widely, and there may not be consensus. But providing an opportunity to explore each other's views and having a shared commitment to the mission will likely result in a stronger team by the time a solution is reached. Ultimately what counts is that each board member respects the process and supports the position taken by the board because all the different voices were heard.

SOLICIT FEEDBACK AND ENCOURAGE GOOD COMMUNICATION

After a few months on the board, new members should be asked for feedback. Do they think the orientation covered everything they needed to know? Do they feel their skills are being used to the best advantage? Do they have ample opportunity to discuss important issues? What have they found most rewarding about their board experience so far? What would they change? Solicit comments about specific activities that they have found useful and why. The governance committee and the board chair should agree on who will be responsible for this orientation follow-up and for taking corrective action, if indicated.

To make sure that some board members are not placed at a significant disadvantage by their geographic distance or by the travel demands of their jobs, board and committee meetings might sometimes be conducted by teleconference or video conference. Such meetings need to be carefully planned, with informational materials sent out ahead, and with guidelines for how to participate in the meeting. Issues that are likely to engender a high degree of emotional response or controversy may best be reserved for face-to-face meetings.

Not only is it important to encourage people to get involved in areas where they can use their expertise and have opportunities for learning, personal growth, and leadership development, it is also important to be sure that the work is well dispersed among board members. If too much power and decision-making authority are concentrated with the board chair or a few select board members, others may lose interest. For this reason, it is essential that the chair assign specific tasks and responsibilities and hold board members accountable.

CLARIFY RESPONSIBILITIES FOR INVOLVING BOARD MEMBERS

Chief responsibility for getting and keeping board members actively and appropriately involved rests with the board chair, but the chief executive and committee chairs bear responsibility too. By getting to know each member of the board and establishing an open line of communication, the chair is essential to their effective inclusion and engagement. Smart chairs will assign board members to committees according to interest, skill, and available time and will check in with new board members after a few months to find out if they need additional information and to invite their feedback on board operations.

The chief executive often plays an important role in engaging board members by providing necessary information as well as suggesting specific ways in which a member's expertise and interests might be of particular service to the organization. For example, the board chair of a youth service organization may ask a board member who lives in the neighborhood of its youth center to serve as the organization's eyes and ears and to keep the staff informed of issues that could lead to conflict. This type of involvement often leads to a board member's greater sense of contribution and commitment.

Since much of the board's work is often conducted outside of board meetings by committees and task forces, the chairs of these groups are instrumental in helping board members to become active participants. By calling, organizing, and facilitating productive meetings where everyone is heard and work gets done, they help provide a sense of accomplishment and belonging. Asking individual members to take on specific tasks on behalf of the committee can provide a welcome challenge. When someone does not show up for meetings or follow through with assignments, good chairs will check in with the person to find out if there is a problem. A telephone call after a meeting saying, "We missed you last night. I hope everything is all right" will not only remind the member that there is work to be done, but also that his or her absence was noticed. It might also provide an opportunity for the member to bring up problems that need to be addressed or to clear up misunderstandings.

Particularly with larger boards, the role of committees and small groups plays an important part of providing board members, both old and new, with opportunities to get to know each other and to be part of a team. However, no matter what the size of the board, all leaders share in the responsibility of actively involving and mobilizing their members in the work of the board.

MAKE USE OF RETREATS

To support the development of the team, the board needs to create opportunities for members to interact more informally than is available during regular board meetings. Members need time to get to know each other by sharing stories and comparing experiences. They need to discover the things they have in common and to explore some of the differences between them. Occasional retreats, if they are scheduled to include as many board members as possible, can serve as powerful team-building events. Whether the focus is on particular topics such as strategic planning, leadership training, board assessments, or a more thorough exploration of important issues, they give board members the chance to gain a better understanding of the board's work and of each other — in other words, to become a more effective team.

Whatever the purpose of the retreat, it requires careful planning. Will it be out-of-town and include overnight accommodations? If so, are there transportation issues for some board members? Are there child care or other dependent care considerations to keep in mind? Are spouses, partners, or children invited? Taking the board overnight to a resort where board members are expected to spend the afternoon playing golf may not be useful for those members who don't play golf, especially if no alternative activities were planned. Even if the retreat is built around a specific set of board issues, make sure there is plenty of time for interaction and for shared social activities. An outside facilitator can help make it possible for everyone, including the chair and the chief executive, to be active participants rather than managers of the board's work.

ACTION STEPS

- Provide opportunities for active participation through interactive board meetings.
- Focus the board on strategically important issues.
- Involve board members on committees and task forces.
- Make information easily available to the board.
- Create opportunities for social interaction, sharing of experiences, and exploration of ideas.

INVOLVING BOARD MEMBERS

- Conduct board meetings that focus on strategic issues and get important things done.
- Encourage all board members to ask questions and actively participate in board discussions.
- Be honest in expressing your opinions.
- Build relationships that foster trust and promote accountability.
- Engage new members in meaningful activities based on their skills, talents, and interests.
- Follow sound board development practices to create a positive working climate for all board members.
- Develop effective communication processes for quick information dissemination and responses.

BARRIERS TO KEEPING BOARD MEMBERS INVOLVED

- The board is too large. Some board members do not feel needed.
- The board is too small. Board members feel overwhelmed or suffer from insufficient stimulation or limited perspectives.
- The executive committee is too active. If it meets too often, the rest of the board may feel like a rubber stamp or disengaged.
- Members received insufficient or ineffective orientation.
- Agendas are weak. They lack substance or are too long or too routine. Board members fail to see the relevance of board meeting topics to organizational performance.
- Members do not feel well used or important. They will decide that they have better things to do.
- There is little or no opportunity for discussion. Board members feel bored or frustrated.
- A few board members are allowed to monopolize discussion, to take up disproportional amounts of airtime, and to carry disproportional weight in decisions.
- The board lacks social glue. Board members have little in common except board service and do not have opportunities to get to know each other.
- Status differences get in the way of team development.
- Board members lack passion for the mission.
- Board participation has become routine after many years of service.

Excerpted from The Board Building Cycle: Nine Steps to Finding, Recruiting, and Engaging Nonprofit Board Members, Second Edition, *by Berit Lakey. BoardSource, 2007.*

PART 4

SUSTAINING DIVERSITY AND INCLUSION

sus·tain *v.*
to make something continue to exist

PART 4
INTRODUCTION

Professors David A. Thomas and Robin J. Ely theorized that in order to leverage the real power of diversity, transformation "requires a fundamental change in the attitudes and behaviors of an organization's leadership," an approach they call the learning-and-effectiveness paradigm ("Making Differences Matter: A New Paradigm for Managing Diversity," *Harvard Business Review,* September-October, 1996). This paradigm "promotes equal opportunity… acknowledges cultural differences among people and recognizes the value in those differences." When utilizing this approach, organizations are open to learning from individual's differences, instead of simply assimilating the individuals ("we're all the same") or assuming their contributions will be limited.

Just as the culture of continuous learning must be nurtured, diversity and inclusion initiatives also require ongoing commitment. Results typically are not achieved overnight but over time. The team creating the diversity and inclusion framework must guide and nourish learning — encouraging flexibility and variety, insisting upon time for generative discussion, resisting the status quo, and welcoming healthy tension. They must pay attention to results, refining methods or revisiting the whole design, if necessary, to achieve desired results. No framework or practice is static. The framers exercise innovative license to change, ensuring the culture, individuals, and organization benefit from improved approaches and lessons learned.

TOOL 10

Because board members typically only meet quarterly, it's easy to become complacent. So how do boards maintain a "reasonable" sense of urgency and stay focused without being seduced or sidetracked by the "strategy de jour" or "goal of the hour"? One way to avoid getting sidetracked is to create an action plan, dashboard, or logic model to keep everyone focused and accountable. Whichever mechanism you select, key components typically include:

Clear Goals — Without goals and stated expectations, the organization lacks direction and board and staff will function in perpetual misalignment. It is impossible to be accountable without being able to compare objectives with achievements. Accountability assumes a solid link between knowing what to aim for and reaching an agreed upon target.

Activities/Action Steps — Articulate how you will meet your goals and objectives and the specific tactics that will be employed.

Resources — Commitment to any program or initiative requires a commensurate commitment of resources, which may be human, financial, organizational, or community resources.

Lead Party — Identify who has primary responsibility for each action item to help ensure accountability.

Timeline/Completion Date — Most plans include a range of activities — some short-term (1-3 years) and others long-term (4-6 years or longer).

Monitoring — Continuous monitoring and acceptance of feedback are critical for improvement and accountability.

Communication — Openly sharing progress, results, and accomplishments helps sustain commitment and is the strongest incentive for organizational accountability.

DISCUSSION POINTS

What are the items your board will track as part of its diversity and inclusion initiative?

- Leadership commitment
- Community demographics
- Board demographics
- Staff demographics
- Diversity and inclusion learning and development opportunities
- Client diversity
- Financial impact
- Program impact
- Partnerships and vendor relationships

	Yes	No
Has your organization or board developed a detailed plan of action for the board to become inclusive?	14.8%	85.2%

Source: BoardSource Nonprofit Governance Index 2010

SAMPLE DIVERSITY AND INCLUSION ACTION PLAN

TOOL 11

DIVERSITY AND INCLUSION ACTION STEPS	RESPONSIBLE PARTIES	IMPACT	TIME FRAME	STATUS
Appoint task force to lead efforts Hire consultant for specialized assistance Gather available data about • board composition • staff composition • constituents and community demographics • stakeholder opinions				
Assess • organizational culture and climate for change • board culture and climate for change • board cultural competence • individual cultural competence • board commitment and consensus regarding diversity and inclusion • organizational policies (that support inclusive environment) • organization communications and Website (for inclusivity)				

DIVERSITY AND INCLUSION ACTION STEPS	RESPONSIBLE PARTIES	IMPACT	TIME FRAME	STATUS
Educate on cultural competence • board • management • staff Consider partnering with other boards/organizations for training and peer learning opportunities				
Establish goals and objectives • build consensus around what diversity means to the board and organization and its benefits and challenges • develop organizational diversity and inclusion statement and post on Web site and in publications • increase interpersonal and intergroup cultural competence • identify strategic recruitment partnerships and tactics to develop diverse pipeline of board candidates • interview exiting board members for insights on board culture and experience				
Monitor activities and results • schedule progress reports on diversity metrics • continue critical conversations about diversity, inclusion, and change				

PART 5

CASE STUDIES

TOOL 12

Eight years ago, The Denver Foundation established the Expanding Nonprofit Inclusiveness Initiative (ENII) to focus on issues of race and ethnicity. The Initiative was designed to address the Metro Denver nonprofit community's rising level of interest in understanding how the inclusion of diverse voices and experiences might enhance and expand its work. One of ENII's first goals was to identify characteristics common to Denver organizations that are highly inclusive of people of color and barriers that prevent Denver nonprofits from becoming highly inclusive.

Today, nonprofit organizations in Metro Denver and elsewhere continue to struggle with becoming diverse and inclusive. As a result, the practices that foster and prevent inclusion identified six years ago remain relevant. Therefore, my colleagues at The Denver Foundation Inclusiveness Project staff and I encourage all nonprofit leaders to reflect on the information presented below as they work to strengthen their communities by building inclusive organizations.

CHARACTERISTICS OF HIGHLY INCLUSIVE ORGANIZATIONS

- *The chief executive almost always establishes the level of commitment, the attitude, the pace, and the behavior related to an organization's overall inclusive practices.*

Organizations that are highly inclusive of people of color are usually led by chief executives who are deeply committed to developing inclusive organizations and by boards that, if not supportive, are unlikely to interfere with the chief executive's efforts. Three out of four case study organizations with very inclusive cultures were dramatically changed when the board hired a new chief executive with a high level of personal and professional commitment to inclusiveness. The fourth organization was founded by an individual who ensured from the beginning that inclusiveness practices were central to the organization's work.

- *The role of the board in influencing organizational change is significant but is limited by the chief executive's attitude and behavior regarding inclusive practices.*

Boards can knowingly or unknowingly perpetuate cultures of exclusivity or create highly inclusive board cultures. In one case study, all of the board and staff members of the organization had been white just a few years prior to our research. A board member of color joined the board and decided to make it a personal goal to recruit more people of color onto the board. At the time of our research, 25 percent of the board comprised people of color and a commitment to diversity at the board level had grown. The chief executive was supportive of these efforts but not a leader in diversifying the board or the staff. No people of color had been hired at the staff level, and the programs and services of the organization were not designed with diverse communities in mind. Thus, despite board changes and the board's commitment to becoming more inclusive, the organizational change was limited because the chief executive was not equally as committed.

In another instance, the board of an organization that historically had a poor reputation within marginalized communities decided to begin the process of diversifying after being lobbied to do so by people in the community. Shortly thereafter, the white chief executive retired, and the board — which had begun adding members of color — intentionally decided to hire someone who was committed to inclusiveness. The new chief executive immediately hired a more diverse staff and worked with the board to bring more people of color onto the board. In this instance, while the board was instrumental in making changes to its own composition, one of its most important actions was to institutionalize the change it envisioned by hiring a chief executive who reflected its commitment to inclusiveness.

- *The race or ethnicity of the chief executive is not the determining factor affecting an organization's inclusiveness practices.*

While some people may perceive that a person of color must lead an organization in order for it to be deeply inclusive, this is not the case. In two different case studies, organizations with white (non-Hispanic) male chief executives significantly transformed the culture of their organizations. Everyone interviewed at these organizations understood that it was the chief executive's leadership that was responsible for changing the organization. Two other organizations, which were led by women of color, were also successful in creating inclusive organizations. The leadership of these chief executives was cited repeatedly as the determining factor in leading change in these organizations as well.

Conversely, a chief executive of color does not guarantee commitment to developing a more inclusive organization solely on the basis of his or her ethnicity. For example, one organization studied was led by a woman of color who had been in her position for more than five years. When asked about recruitment practices that might lead to hiring a diverse staff, she said the only thing she considered was an applicant's qualifications. She did not intentionally do outreach or recruitment in communities of color. While this organization did have staff members of color, it had no board members of color and had not made any deliberate attempts to create a more inclusive environment for diverse clients, constituents, staff, or board members.

Though the race or ethnicity of an organization's chief executive may not be the salient factor affecting inclusiveness levels, it is still a factor, however. White chief executives may benefit from a perception that they are leading a diversification effort because it is good for the organization. Chief executives of color may be subjected to criticism and a perception that they are engaging in the work only because it is perceived to be beneficial for them and their ethnic community. This may cause a certain degree of tension within the organization that white chief executives may not face. On the other hand, organizations with chief executives of color may benefit from a perception that chief executives of color are more knowledgeable about communities of color and have a greater expertise about race and ethnicity than white chief executives. Boards should consider how these subtle perceptions may influence their responses to chief executive efforts to impact change.

BARRIERS THAT PREVENT INCLUSIVENESS

- *The most significant barrier an organization faces is the perception that its mission is not relevant to communities of color.*

This perception seemed to be especially pervasive in arts and culture organizations but existed in other kinds of organizations as well. Over time, these perceptions can develop into mythic proportions and become so deeply ingrained in the organizational culture that staff and board members become conditioned to believe the myth without questioning it. For example, a white chief executive of an arts organization whose artists included numerous people of color but whose board, staff, and audience were mostly white stated, "It's a shame that other cultures don't see value in art outside of their own communities." Perceptions of this kind are debilitating to organizations because they negatively stereotype communities of color, placing blame on the community and releasing the organization of any responsibility.

ENII's research found that those nonprofits that make the shift to become truly inclusive do so because they understand that becoming inclusive will make a difference in their ability to accomplish their missions.

Our case studies also revealed that white board and staff members and board and staff members of color within the same organization often had different impressions about how their organizations are perceived by people of color. Significant differences in perception among people who serve the same organization indicate that organizational myths about how people of color respond to an organization's work are frequently inaccurate. Highly inclusive organizations have found that they can overcome these concerns by collecting information on perceptions held by people of color about their organizations and by being deliberate in their responses to the information gathered.

- *An organization's failure to recognize the potential board and staff members of color all around it jeopardizes its efforts to become inclusive.*

One relatively small organization had very few people of color on the board and staff despite the fact that it had thousands of clients — of which 45 percent were people of color — and hundreds of volunteers, many of whom were also people of color. Interestingly, all of the interviewees of this organization believe that the leadership values inclusiveness. This organization would be able to develop a more diverse staff and board if it formalized a board and staff recruitment process that included opportunities for clients and volunteers to more easily move into these positions.

- *Boards that have term limits that are either very short or very long have the most difficulty becoming inclusive.*

Not surprisingly, our research showed that it takes time and a deep commitment to become an inclusive organization. Organizations that made attempts to diversify their boards and their staff but failed to make sustained commitments to diversity and inclusiveness raised hopes and expectations that were never met.

In our research, one board-related structure stood out as a factor in determining a board's inclusiveness: term limits. For example, the working board of a small organization that has one-year terms had made intermittent attempts to become more inclusive. However, because the leadership of this board turned over so quickly, any lasting commitment to institutionalizing change was severely limited.

Another organization suffered from exactly the opposite predicament. In this case, there was no limit to the number of years that board members could serve the organization. As a result, many members had served for eight to 10 years. While this organization had made considerable progress with inclusive practices in general, its board was comprised exclusively of African Americans and whites. Most of the interviewees from this organization identified the need to bring on individuals of color from a variety of racial/ethnic backgrounds, but there was inertia on the board regarding further attempts at diversification given that positions on the board rarely open up.

Due to a variety of external and internal considerations, every organization has a combination of best practices and barriers. Those organizations that have been intentional about focusing on best practices and have worked hard and long to overcome the barriers to inclusiveness have strengthened their organizations' ability to carry out their missions. And time and again, the individuals involved in the process of diversifying their organizations reported that the effort was extremely rewarding.

The Denver Foundation established the following definitions for its work with nonprofit organizations:

Diversity describes the extent to which an organization has diverse people serving as board members, staff, and/or volunteers.

Inclusive organizations are learning-centered organizations that value the perspectives and contributions of all people and strive to incorporate the needs and viewpoints of diverse communities into the design and implementation of universal and inclusive programs. Inclusive organizations are, by definition, also diverse.

If you are interested in exploring how your organization can become more inclusive, answer the following questions related to best practices and barriers.

If you are a chief executive, have you developed and expressed your commitment to inclusiveness? If so, how?

Has your organization formalized a long-term, integrated approach to developing inclusiveness?

Have you considered the assets and markets that communities of color can bring to your organization?

Have you recruited and retained a staff that can communicate effectively with your constituents?

Do communities of color understand your mission and your work?

Have you assessed existing resources for developing inclusive leadership in your organization, including volunteers and clients?

Does the structure of your board lend itself to developing inclusiveness?

Excerpted from "Inside Inclusiveness" by Katherine Pease. Board Member®*, September/October 2009.*

TOOL 13

THE ART OF FOUNDING AN INCLUSIVE BOARD

THE ART OF FOUNDING AN INCLUSIVE BOARD

Founded in 2004, The Opportunity Agenda works with social justice organizations and leaders to build public support for greater opportunity in America. Using an integrated strategy of communications, research, and advocacy, we address the challenges and barriers facing low-income people, people of color, immigrants, women, and other Americans who are most often denied opportunity in both strong and weak financial times.

Our organization is a project of Tides Center, the nation's largest fiscal sponsor of progressive social change initiatives. As our fiscal sponsor, Tides Center is legally and financially responsible for The Opportunity Agenda's programs and activities. Fiscal sponsorship is an effective and efficient means for starting new charitable initiatives because it enables the movement of resources from funders and donors to projects, activities, ideas, and organizations that share the fiscal sponsor's mission.

TO SPIN OFF OR NOT TO SPIN OFF

In 2007, The Opportunity Agenda convened a group of outside advisors — philanthropists and corporate and nonprofit leaders — to help us determine whether or not we should spin off from Tides Center and incorporate as a 501(c)(3) and, if so, under what conditions and timeframe. After much thought, The Opportunity Agenda decided to go solo after we had reached approximately $2 million in annual revenue and expenditures and had significant funds in reserve. In the meantime, we would start the process by creating our own initial board of directors to bring good governance practices from inception, to begin overseeing our activities and finances, and to enhance our fundraising power. We believed The Opportunity Agenda would benefit from the creative and strategic guidance of a new group of individuals with fresh perspectives.

As one might expect, given the work that we do, The Opportunity Agenda has a deep respect for diversity. The staff includes African Americans, Asian Americans, Latinos, and Caucasians, and people with disabilities. We are diverse in terms of gender, sexual orientation, age, religious belief, and professional expertise. We are committed to building a board as diverse as the staff. And yet, like other organizations, we have learned that finding, training, and retaining a diverse group of board members requires hard work and a concerted effort.

MAKING LISTS...

Charged with overseeing the board building process, I began by seeking examples of truly diverse boards. I discovered that these are few and far between. My peers and consultants in the field told me of boards that are racially and ethnically diverse but, upon close inspection, I learned that the members are all lawyers or from the nonprofit sector. These boards are diverse in some ways but not in others. Nor could I find many people with experience creating a diverse board from the get-go; most of my peers

and most consultants work with existing boards. So, early in the process, it became clear that The Opportunity Agenda would be charting new territory in its quest to build a diverse board from scratch.

We started by creating a long list of qualities, experiences, expertise, and background that we want on our board. Racial and ethnic diversity is very important to us, but we also are interested in finding candidates from the worlds of entertainment, politics, and philanthropy. We want to attract a social justice luminary and people well versed in employment law, communications and advertising, and accounting because we believe these skills are essential to our organization's health and prosperity.

Second, we developed a broad list of candidates and created a matrix to track their various aspects of diversity. I have often witnessed multiple organizations recruiting board members, honorees, or gala chairs from the same pool of African-American chief executives or entertainers with the rationale that these individuals are the most likely to raise their organizations' profiles and connect them to networks of influence. The Opportunity Agenda chose to not dip into this pool. Instead, after spending a few days researching and brainstorming about our own networks of influence, we were able to identify nearly 100 candidates from diverse backgrounds — people who, while less well known, have the skills, time, and potential to become excellent board members for The Opportunity Agenda.

...AND CHECKING THEM THRICE

Our nascent board has been very helpful in identifying, vetting, and growing the list of candidates. This has required a real investment of time. The members have spent approximately half of their meeting time this past year discussing nominations. Our conversations, which are based on candidate profiles drawn up by a prospect researcher, have been lengthy and fascinating. Do we have too many candidates who are lawyers? Too many who are Ivy League alumni? Enough people with deep pockets? Someone who would be an inspiring and capable board chair? Someone with expertise in human resources and someone able to oversee a future budget committee? Can we have too many African-American candidates?

While there is always a subjective aspect to how individuals evaluate potential board members, our diversity/talent matrix keeps us accountable and honest about the overall board that we are building. At each meeting, we look at our matrix and see the pattern that we are creating. Because we set diversity goals in terms of talent, skills, and background, we can very quickly see what is missing.

PAUSING TO PONDER SOME MORE

After conversing early in the process about optimal board size for a best practices board, The Opportunity Agenda agreed to recruit seven to nine board members in 2008. It's been an ambitious goal given the amount of time it takes to meet, vet, and orient each candidate. For that reason, we are now planning to pause and reflect at the end of this first wave of recruitment. There is an art to building a board, and we want to critique our work thus far. Asking what kind of talent is missing, what demographics are overrepresented or underrepresented, and what our next group of board members should look like is essential. Our ongoing conversations and matrix will help us answer those questions and build a truly diverse and talented board.

Excerpted from "The Art of Founding an Inclusive Board" by Jason Drucker. Board Member®, *November/December, 2008.*

TOOL 14

A COLORFUL BLUEPRINT

Who is preparing the next generation of ethnically diverse leaders in your community?

In Texas's largest city, the answer is the United Way of Greater Houston's Project Blueprint. For more than 20 years, Project Blueprint has prepared emerging leaders of Houston's African American, Asian, and Hispanic communities to fill key roles on nonprofit boards and board committees.

In 1988, Dorothy F. Caram, Ph.D., a visionary member of the United Way of Greater Houston's board, recognized that the community's nonprofit sector would be in a better position to meet the needs of its diverse client population if it had well-trained board members with a variety of backgrounds and perspectives. She, therefore, engaged the board in an effort to create a leadership development program.

Concurrently, United Way of America and the W.K. Kellogg Foundation recognized the demographic change that was beginning to shape the nation's urban landscape. They understood that the boards of nonprofit organizations must reflect this diversity if they were to continue to have a significant impact in their communities. In 1988, United Way of America and the W.K. Kellogg Foundation selected 22 United Ways to pilot a leadership development program. United Way of Greater Houston (UWGH) was one of the sites selected, and today, the Houston Project Blueprint program continues to focus on its original charge — to increase ethnic diversity in the leadership of the nonprofit sector.

FINDING PROMISING CANDIDATES

Project Blueprint recruits potential leaders from the rich diversity of the Houston community. Every year, we begin the process by asking the program's alumni to recommend candidates as well as businesses and associations whose employees or members would be excellent candidates. As an incentive, Project Blueprint has instituted the Annual Alumni Spirit Award to recognize alumni who contribute significantly to the recruitment process. UWGH's "business resource groups" at Houston's major corporations also provide a pool of promising candidates.

The United Way invites all potential candidates to attend one of two information sessions at which a panel of graduates share their Project Blueprint experiences. It is the graduates' testimonials that truly sell the program. A volunteer selection committee, which also comprises graduates, reviews and ranks each application based on the applicant's professional experience, community involvement, and leadership potential. Committee members conduct personal interviews with the top applicants and select the participants. The committee's primary goal is to ensure that each class of 18 to 20 individuals is demographically diverse in terms of age, gender, ethnicity, and professional occupation.

TEN WEEKS OF TRAINING

Those individuals who are selected to participate in the program are required to attend a 10-week program that focuses on all aspects of nonprofit governance and, upon completion, the UWGH Agency Board Fair. The program includes team building, volunteer placement, networking opportunities, and continuing development. There is a $500 program fee.

Stephen Klineberg, Ph.D., professor of sociology at Rice University, opens the program with a presentation, "The Changing Face of Houston: 27 Years of Houston Surveys," that sets the stage for the next 10 weeks and makes the case for Project Blueprint. According to Klineberg's research, Houston has become one of the most culturally diverse cities in America, and it is essential for the city's nonprofit leadership to reflect this diversity.

Following the opening session, the participants attend a two-day retreat designed to foster team spirit among new class members. The members delve deep into their work styles and the work styles of their classmates as they discuss the results of their Myers-Briggs Type Indicator personality assessments, build camaraderie by participating in rope challenge courses, and bridge generational gaps during a generational diversity workshop. At the end of the two-day retreat, the participants are ready to build the skills needed to be effective board leaders.

During the next 10 weeks, experts in all areas of nonprofit governance lead the participants through intense workshops covering board roles and responsibilities, legal and ethical responsibilities, strategic planning, meeting management, human resources, reputation management, crisis communication, fiscal management, transparency, and fundraising. In addition to the workshops, participants are provided the opportunity to meet with a panel of chief executives and board members who discuss their experiences and expectations and answer questions.

PLACING THE GRADUATES

At the end of the program, Project Blueprint graduates are placed on nonprofit boards and board committees throughout the Houston community. A class profile that includes each participant's photograph, profession, business affiliation, volunteer involvement, and area of interest is mailed to all UWGH affiliate agencies, members of UWGH's Management Assistance Program, and other nonprofits that want to diversify their boards. Interested nonprofits are required to complete an Agency Request Form, which we share with the graduates. We then put the graduates in contact with those nonprofits that interest them. The graduates also are required to attend the annual UWGH Agency Board Fair with representatives of nonprofits to discuss board opportunities.

While Project Blueprint cannot promise a good fit between its graduates and the nonprofit boards and board committees they join, the program does encourage its participants to join an agency whose mission matches their passion. We also encourage the graduates to interview those agencies that interest them, asking questions about governance, structure, directors and officers insurance, and financial stability.

Project Blueprint is an excellent resource for our nonprofit community and one that our nonprofit community values. The program reduces the time nonprofits must invest in identifying and recruiting their board volunteers. Most important, the program offers the nonprofit sector a pool of well-trained leaders with a variety of backgrounds and perspectives needed to assist the sector in meeting the needs of its client population.

To date, Project Blueprint has graduated 27 classes of highly skilled leaders; the 28th class is meeting this spring. More than 658 graduates have moved into leadership roles in local nonprofits, serving on boards and board committees.

Project Blueprint graduates are making a lasting difference in our community and clearly exhibit the program's motto (borrowed from Mahatma Gandhi) — "You must be the change you want to see in the world."

Excerpted from "A Colorful Blueprint" by Karen White. Board Member®, *May/June 2009.*

PART 6

SAMPLE POLICIES AND GUIDELINES

EQUAL EMPLOYMENT OPPORTUNITY POLICY

TOOL 15

The law requires your organization to post the Equal Employment Opportunity poster in your office. A separate policy strengthens your commitment and declares that your intention is to go past legal requirements and do the right thing. Equal employment is not defined by one's ethnicity, personal preferences, or looks but ensures your employment practices are based on matching the right skills to positions.

SAMPLE POLICY

[Our Organization] ensures that all employment decisions are based on the ability of an individual to perform the duties and responsibilities of the position. We follow the law to enhance every employee's ability to gain access to our facility, which includes providing accommodations to people with disabilities (if applicable).

We follow the federal and state nondiscrimination laws. [Our state] Fair Employment Law prohibits employment discrimination on the basis of: age, ancestry, arrest or conviction record, color, creed, handicap or disability, marital status, national origin, race, religion, sex, sexual orientation, or membership in any reserve component of the United States or state military forces. In addition, harassment, retaliation, and unfair honesty testing are illegal under the law.

The policy applies to all employment practices, including but not limited to recruitment, hiring, training and development, promotion, transfer, termination, layoff, compensation, benefits, social and recreational programs, and all other conditions and privileges of employment in accordance with applicable federal, state, and local laws.

TOOL 16

VENDOR SELECTION POLICY

By drafting a vendor or supplier policy, your organization is sending a message that its diversity efforts are universal — and that it supports minority-owned businesses.

SAMPLE POLICY

When selecting vendors, [the Organization] is committed to doing business with all people and companies, without bias. We openly seek bids and request RFPs from a vast variety of sources. We give maximum opportunity to minority-, women-, and disabled veteran-owned companies. We do not automatically renew contracts but evaluate the performance of our vendors according to the following factors:

- Ability to provide quality product in a timely and consistent manner
- Competitive pricing
- Favorable terms and conditions
- Order accuracy rate
- Delivery lead times
- Reliable support services

CODE OF CONDUCT POLICY

TOOL 17

An organization-wide code of conduct fine-tunes your values and brings them to life. A code of conduct defines appropriate behavior among colleagues, board members, or with your clients and customers. The code acts as a reminder when working with a colleague with different traditions and habits; its message spells tolerance.

SAMPLE POLICY

As a nonprofit organization at the forefront of [purpose of organization], XYZ's policy is to uphold the highest legal, ethical, and moral standards. Our donors and volunteers support XYZ because they trust us to be good stewards of their resources and to uphold rigorous standards of conduct. Our reputation for integrity and excellence requires the careful observance of all applicable laws and regulations, as well as a scrupulous regard for the highest standards of conduct and personal integrity.

XYZ will comply with all applicable laws and regulations and expects its directors, officers, and employees to conduct business in accordance with the letter and spirit of all relevant laws; to refrain from any illegal, dishonest, or unethical conduct; to act in a professional, businesslike manner; and to treat others with respect. Directors and officers should not use their positions to obtain unreasonable or excessive services or expertise from XYZ's staff.

In general, the use of good judgment based on high ethical principles will guide directors, officers, and employees with respect to lines of acceptable conduct. However, if a situation arises where it is difficult to determine the proper course of conduct, or where questions arise concerning the propriety of certain conduct by an individual or others, the matter should be brought to the attention of XYZ. Employees should contact their immediate supervisor and, if necessary, the director of human resources. Board members should raise any such concerns with the chair or the treasurer of XYZ's board.

In all questions involving ethics and conduct, the board will make relevant determinations, except that any individual whose conduct is at issue will not participate in such decisions.

Excerpted from The Nonprofit Policy Sampler, Second Edition, *by Barbara Lawrence and Outi Flynn. BoardSource, 2006.*

TOOL 18

WHISTLEBLOWER POLICY

The Sarbanes-Oxley Act of 2002 amended the criminal law on whistleblowers and today covers all organizations, nonprofits included, prohibiting any repercussions to individuals who shed light on potential wrongdoings in an organization. It makes sense to draft a policy where the process of reporting wrongdoings is clarified and where the treatment of whistleblowers is clearly stated. A policy not only enforces your organization's respect of the law but sends a message that all reporting will be properly investigated — thus eliminating public disclosure of potential complaints originating from personal disagreements.

SAMPLE POLICY

INTRODUCTION

The Statement of Values and Code of Ethics adopted by XYZ requires all staff, board members, and volunteers to observe high standards of business and personal ethics in the conduct of their duties and responsibilities. As employees and representatives of XYZ, we must practice honesty and integrity in fulfilling our responsibilities and comply with all applicable laws and regulations. Set forth below is XYZ's policy with respect to reporting good-faith concerns about the legality or propriety of XYZ actions or plans.

REPORTING OF CONCERNS OR COMPLAINTS

It is the responsibility of all staff, board members, and volunteers to comply with XYZ's Code of Ethics and applicable law and to report violations or suspected violations in accordance with this Whistleblower Policy.

CONFIDENTIALITY

XYZ will treat all communications under this policy in a confidential manner, except to the extent necessary 1) to conduct a complete and fair investigation, or 2) for review of XYZ operations by XYZ's board, its audit committee, XYZ's independent public accountants, and XYZ's legal counsel.

RETALIATION

XYZ will not permit any negative or adverse actions to be taken against any employee or individual for making a good-faith report of a possible violation of its Code of Ethics or applicable law, even if the report is mistaken, or against any employee or individual who assists in the investigation of a reported violation. Retaliation in any form will not be tolerated. Any act of alleged retaliation should be reported immediately and will be promptly investigated. An employee who retaliates against someone who has reported a violation in good faith is subject to discipline up to and including termination of employment. This Whistleblower Policy is intended to encourage and enable employees and others to raise serious concerns within XYZ prior to seeking resolution outside the organization.

How to Report Concerns or Complaints

Employees and others may communicate suspected violations of its Code of Ethics, applicable law, or other wrongdoing or alleged retaliation by contacting XYZ's [title, name, phone, e-mail]. If you wish to remain anonymous, it is not necessary to give your name or position in any notification.

Whether or not you identify yourself, for a proper investigation to be conducted, please provide XYZ with as much information as you can, sufficient to do a proper investigation, including where and when the incident occurred, names and titles of the individuals involved, and as much other detail as you can provide.

Illustrative Types of Concerns

The following is a partial list of the kinds of improprieties that should be reported:

- supplying false or misleading information on XYZ's financial or other public documents, including its Form 990

- providing false information to or withholding material information from XYZ's board or auditors

- destroying, altering, mutilating, concealing, covering up, falsifying, or making a false entry in any records that may be connected to an official proceeding, in violation of federal or state law or regulations

- altering, destroying, or concealing a document, or attempting to do so, with the intent to impair the document's availability for use in an official proceeding or otherwise obstructing, influencing, or impeding any official proceeding, in violation of federal or state law or regulations

- embezzling, self-dealing, private inurement (i.e., XYZ earnings inuring to the benefit of a director, officer, or senior management) and private benefit (i.e., XYZ assets being used by anyone in the organization for personal gain or benefit)

- paying for services or goods that are not rendered or delivered

- using remarks or actions of a sexual nature that are not welcome and are likely to be viewed as personally offensive, including sexual flirtations; unwelcome physical or verbal advances; sexual propositions; verbal abuse of a sexual nature; the display of sexually suggestive objects, cartoons, or pictures; and physical contact of a sexual or particularly personal nature.

- using epithets, slurs, negative stereotyping, and threatening, intimidating, or hostile acts that relate to race, color, religion, gender, national origin, age, or disability

- circulating or posting written or graphic material in the workplace that denigrates or shows hostility or aversion toward an individual or group because of race, color, religion, gender, nationality, age, or disability

- discriminating against an employee or potential employee due to a person's race, color, religion, sex, sexual orientation, national origin, age, physical or mental impairment, or veteran status

- violating XYZ's Statement of Values and Code of Ethics, Conflict-of-Interest Policy, Harassment Policy, or Equal Employment Opportunity Policy

- facilitating or concealing any of the above or similar actions

Questions

If you have any questions regarding this policy, please contact _____.

TOOL 19

CONFLICT RESOLUTION GUIDELINES

It is normal and desired to bring differing views to the boardroom and staff encounters. It is normal to have to deal with disagreements and even more serious debates when individuals with diverse opinions and experiences get together and must collaborate. Adults are expected to handle these situations in an adult manner. It should be possible to handle common disagreements on board and between board and staff outside of a courtroom. If it is difficult to find a common ground on a meaningful matter, an impartial process under a qualified mediator or arbiter allows an informal and a neutral approach to addressing disagreements.

CORE CONCEPTS

- Disagreements and even conflicts are normal when people with different backgrounds and perspectives work together and must find consensus on the process and outcomes of their work.

- Avoiding legal expenses is a major benefit in an alternate conflict resolution approach.

- Most common conflicts happen between board members and the chief executive.

- Common types of conflicts (that do not necessarily need to be solved in the courtroom) result from personality differences, turf battles, and interpretation of data or expectations. A diverse board naturally has more opportunities to heated "exchanges of opinions."

- A skillful mediator or arbiter can depersonalize the process.

DISCUSSION POINTS

- Are we all in agreement about our mutual and individual authority levels? What have we done to define the respective roles for the board, individual board members, chair, chief executive, and the rest of the staff?

- What is constructive conflict in our board?

- Do we all accept that differing points of views on many issues are desired?

- How can we best take emotions out of communication during a conflict?

- What is our process to secure confidentiality and privacy of all the participants?

- How will we deal with hurt feelings and repair relationships after the conflict has been handled?

LEGAL AND COMPLIANCE ISSUES

- The full board and the chief executive need to be in agreement about using the chosen conflict resolution method without resorting to litigation afterwards.

- An agreement is needed to choose between arbitration (both sides agree to accept the solution offered by a professional third party) or mediation (a third party professional attempts to find a settlement between the two sides).

GLOSSARY

Affirmative Action
Specific actions in recruitment, hiring, promotion, enrollment or other types of selection that are designed to assure the representation of formerly excluded classes of people and overcome inequity by eliminating the present effects of past discrimination.

Bigotry
Obstinate and unenlightened attachment to one's own beliefs or opinions; intolerance of opposing views and the actions based on such thinking.

Cultural Competence
The ability to understand, accept, respect and effectively lead, work and volunteer with people from other cultures and backgrounds. Cultural competence can be measured by the extent to which individuals and organizations can create and maintain an environment that is welcoming, equitable and supportive of difference in the pursuit of common goals.

Culture
The shared belief system and practice of racial, religious, social of other kind of group. Cultural attributes may include language, values, beliefs, norms, customs, traditions, patterns of communication, food, religion, family life, dress and music.

Discrimination
Treating a person or group less favorably than another, based on prejudice or bigotry toward them.

Diversity
The differences among people based on race, religion, ethnicity, language, gender, sexual orientation, age, physical or mental ability, socioeconomic status or other characteristics.

Dominant Group
A group which controls the distribution of power, wealth and status in society. While the dominant group is often, but not necessarily majority, it establishes the pervasive norms, values and images of the society and gets enhanced privileges and social power in return. Sometimes referred to as the advanced, privileged or oppressor group.

Ethnic Group
A group with a shared cultural background, which may include language, traditions, history and ancestry. Ethnicity is not the same as race. Cultural rather than biological traits are the essential attributes of an ethnic group.

Harassment
Verbal, physical and visual conduct that creates an intimidating, offensive or hostile environment or interferes with performance. Harassment can take many forms and may include, but is not limited to, the following: slurs, jokes, statements, pictures and other images, gestures, assault, impeding or blocking another's movement or otherwise physically interfering with normal activity.

Inclusion/Inclusiveness
The practice of embracing, within a supportive environment, all who accept an organization's core values.

Minority
A subordinate group that is smaller or is disadvantaged, underprivileged, excluded, discriminated against or exploited by a dominant group with a society. The characteristics of a minority group might differ from those of the dominant group in areas such as race, religion, ethnicity, national origin, culture, etc. The term "minority" is sometimes considered a reinforcement of racist assumptions, given that people of color constitute a majority of the world's population. Women are generally not classified as a minority. However, in the U.S. they are considered as having legal "minority" status, having been subjected historically to systematic exclusion and discrimination.

Multiculturalism
A belief or policy that embraces all cultural groups in an environment that respects and appreciates each group's uniqueness.

People-First Language
Language used to describe individuals with specific attributes in ways that "put the person first" and reflect individuality, equality and dignity; for example, person who is blind, person with a disability, person living with HIV/AIDS.

People of Color
Individuals who are not white/Caucasian. This is a term of inclusion and solidarity, generally preferable to the expressions "minority" or "non-white," which assume whiteness as the norm against which all others are defined. Some people of color prefer to be identified by their particular racial/ethnic group such as African-American, Latina, Asian, or Native American.

Prejudice
Preconceived judgment, opinion or inclination that is applied without sufficient knowledge, reason or understanding, leading to bias or discrimination against an individual or group.

Race
A group connected or identified by common descent or origin, usually based on skin color or other distinctive characteristics or cultural qualities. Race is a social construct; there is no biological basis for different racial groups.

Racism
The subjugation of one racial group by another group through individual actions, institutional policies and practices and cultural norms and values. Racism is based on the belief that race is the primary determinant of human traits and capacities and the racial differences produce inherent superiority of a particular group.

Stereotype
Exaggerated or oversimplified preconceived beliefs; typecasting or treatment of the members of a group based on assumptions and misinformation.

Subordinate Group
A group that has less access to social power than the dominant group and is subject to systematic discrimination, marginalization, exploitation and victimization by dominant group individuals and institutions. Sometimes referred to as an oppressed, targeted or disadvantaged group.

Tokenism
The policy and practice of making only a perfunctory effort, symbolic gesture or minimal concessions, usually toward minority or subordinate groups.

Race-Based Privilege
Benefits or unearned advantages systematically afforded members of the dominant group simply because of their identity, whether or not they want or are aware of these privileges.

ABOUT

BOARDSOURCE®
Building Effective Nonprofit Boards

BoardSource is dedicated to advancing the public good by building exceptional nonprofit boards and inspiring board service.

BoardSource was established in 1988 by the Association of Governing Boards of Universities and Colleges (AGB) and Independent Sector (IS). Prior to this, in the early 1980s, the two organizations had conducted a survey and found that although 30 percent of respondents believed they were doing a good job of board education and training, the rest of the respondents reported little, if any, activity in strengthening governance. As a result, AGB and IS proposed the creation of a new organization whose mission would be to increase the effectiveness of nonprofit boards.

With a lead grant from the Kellogg Foundation and funding from five other donors, BoardSource opened its doors in 1988 as the National Center for Nonprofit Boards with a staff of three and an operating budget of $385,000. On January 1, 2002, BoardSource took on its new name and identity. These changes were the culmination of an extensive process of understanding how we were perceived, what our audiences wanted, and how we could best meet the needs of nonprofit organizations.

Today BoardSource is the premier voice of nonprofit governance. Its highly acclaimed products, programs, and services mobilize boards so that organizations fulfill their missions, achieve their goals, increase their impact, and extend their influence. BoardSource is a 501(c)(3) organization.

BoardSource provides

- resources to nonprofit leaders through workshops, training, and an extensive Web site (www.boardsource.org)

- governance consultants who work directly with nonprofit leaders to design specialized solutions to meet an organization's needs

- the world's largest, most comprehensive selection of material on nonprofit governance, including a large selection of books and CD-ROMs

- an annual conference that brings together approximately 900 governance experts, board members, and chief executives and senior staff from around the world

For more information, please visit our Web site at www.boardsource.org, e-mail us at mail@boardsource.org, or call us at 800-883-6262.

The Governance Series

1. *Ten Basic Responsibilities of Nonprofit Boards, Second Edition*
2. *Legal Responsibilities of Nonprofit Boards, Second Edition*
3. *Financial Responsibilities of Nonprofit Boards, Second Edition*
4. *Fundraising Responsibilities of Nonprofit Boards, Second Edition*
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MORE BOARDSOURCE RESOURCES

Other Books

The Handbook of Nonprofit Governance

Chief Executive Transitions: How to Hire and Support a Nonprofit CEO

Nonprofit Executive Compensation: Planning, Performance, and Pay, Second Edition

Trouble at the Top: The Nonprofit Board's Guide to Managing an Imperfect Chief Executive

The Board Chair Handbook, Second Edition

Navigating the Organizational Lifecycle: A Capacity-Building Guide for Nonprofit Leaders

Getting the Best from Your Board: An Executive's Guide to a Successful Partnership

Taming the Troublesome Board Member

Moving Beyond Founder's Syndrome to Nonprofit Success

Culture of Inquiry: Healthy Debate in the Boardroom

Governance as Leadership: Reframing the Work of Nonprofit Boards

Understanding Nonprofit Financial Statements, Third Edition

The Nonprofit Board Answer Book: A Practical Guide for Board Members and Chief Executives, Second Edition

The Board Building Cycle: Nine Steps to Finding, Recruiting, and Engaging Nonprofit Board Members, Second Edition

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Transforming Board Structure: Strategies for Committees and Task Forces

The Nonprofit Legal Landscape

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The Nonprofit Policy Sampler, Second Edition

The Source: Twelve Principles of Governance That Power Exceptional Boards

Fearless Fundraising for Nonprofit Boards, Second Edition

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Who's Minding the Money? An Investment Guide for Nonprofit Board Members, Second Edition

DVDs

Meeting the Challenge: An Orientation to Nonprofit Board Service

Speaking of Money: A Guide to Fundraising for Nonprofit Board Members

Online Assessments

Board Self-Assessment

Assessment of the Chief Executive

Executive Search — Needs Assessment

Diversity in Action Assessment and Toolkit

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