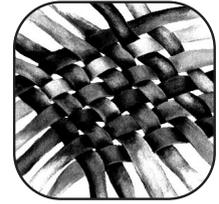


## MODULE 11: PERSONNEL



**Step One:** Creating Your Inclusion Committee

**Step Two:** Training and Consultants

**Step Three:** Definitions and Case Statement

**Step Four:** Gathering and Analyzing Information

**Step Five:** Creating Your Inclusion Blueprint

**Step Six:** Implementation



## MODULE 11: PERSONNEL

### Overview of Content

In this module, you will:

- Learn about diversity and inclusiveness in the workplace.
- Articulate the benefits of creating a more inclusive and diverse staff.
- Articulate the costs of not creating a more inclusive and diverse staff.
- Analyze the data from the information-gathering process that pertain to the staff.
- Review a series of concrete suggestions for creating a more inclusive and diverse staff that focus on recruiting a more diverse staff, retaining a more diverse staff, and developing policies related to personnel that can help improve inclusiveness for your organization.
- Establish goals and objectives for your staff that will be integrated into the inclusiveness blueprint.

This module should be completed by any organization that has decided to look at *personnel practices and composition*. If you haven't prioritized this area as a part of your inclusiveness initiative, then skip to *Module 12: Organizational Culture*.

### A Special Note on Legal Matters

This workbook is not intended to provide any legal guidance on any matters related to hiring, managing, or firing staff. If you have legal questions regarding anything in this workbook, contact an employment attorney or human resources specialist for further information.

### Who to Involve

The work in this module will be completed by the Inclusiveness Committee as a whole or a subset of the committee that would include members who have particular expertise about or responsibility for personnel.

### Exercises to Complete

- *Exercise 11-A: Benefits of Recruiting and Retaining Staff of Color*
- *Exercise 11-B: Costs of Not Recruiting and Retaining Staff of Color*
- *Exercise 11-C: Analyzing Information*
- *Sample 11-D: Sample Professional Development Plan*
- *Exercise 11-E: Developing an Action Plan for Personnel*
- *End-of-Module Checklist*

**Step Five:** Creating Your  
Inclusiveness  
Blueprint

## MODULE 11: PERSONNEL



### Race and Ethnicity in the Workplace

There are some striking research findings regarding the experiences that many people of color have in their workplaces. Though one should be careful not to make broad generalizations as a result of these findings, it is important to understand that many people of color have had negative experiences in their past or current workplaces as a result of their race or ethnicity. These experiences can influence how some individuals perceive workplaces in general.

In 2002, the Center for Creative Leadership completed a survey of 330 individuals' perceptions of their workplace. Approximately half of the respondents were white and approximately one-third of respondents were African American. The remaining respondents came from other racial and ethnic backgrounds. The survey findings uncovered the following differences in how African Americans and whites perceive the effects of racial issues on their workplaces:

- More than 63 percent of African Americans said that race is a moderate to great source of tension in their workplace. Only 26 percent of whites believed that race was a moderate to great source of tension in their workplace.
- Almost twice as many African American respondents as white respondents said that dealing with race-related issues at work was painful or difficult.
- Sixty-seven percent of African Americans rated their workplaces as being moderately to very sensitive to racial diversity issues while 82 percent of whites felt that their workplaces were moderately to very sensitive to racial diversity issues.<sup>1</sup>

Not every person of color who works at a nonprofit organization experiences the same issues. However, the fact that some studies about the experiences of people of color in the workplace found these trends is a good reason to look seriously not only at how an organization *recruits* staff of color but also how it *retains* staff of color.

### Why Recruiting and Retaining a Diverse Staff Matters

Recruiting and retaining a diverse staff can make a very real difference in organizational effectiveness. Many organizations find that there are countless benefits to recruiting and retaining a diverse staff, and that there can be significant costs to not recruiting and retaining a diverse staff.<sup>2</sup>



*“I believe in Liberty for all men: the space to stretch their arms and their souls.”*

*-W.E.B. Du Bois*

### ***Benefits to Recruiting and Retaining a Diverse Staff***

- A diverse staff is more likely to understand the assets and needs of diverse clients or constituents and, therefore, is more likely to be able to design and execute programs that meet the needs of diverse constituents.
- As demographics in most communities are changing, a diverse staff is more likely to recognize changing needs in various population groups and be able to have an effect on an organization's continued relevance.
- A diverse staff will usually be able to provide better, more culturally appropriate customer service.
- A diverse staff is generally more effective at developing communications strategies to help an organization communicate effectively with diverse audiences (e.g., diverse donors, community leaders, and strategic partners).
- Organizations that proactively address issues of inclusiveness and that have diverse staffs have been shown to be more effective at problem solving. Specifically, when an organization values minority viewpoints, the organization usually develops a larger number of alternative solutions to problems and more thoroughly examines the assumptions and implications of alternative scenarios.<sup>3</sup>
- A diverse staff is more likely to reap the benefits of creativity and innovation. A 1996 study by McLeod, Lobel & Cox found that racially diverse groups were 11 percent more likely to come up with creative ideas than all white groups. The study evaluated an idea's creativity not only relative to overall effectiveness but also in terms of whether the idea could feasibly be implemented.<sup>4</sup>

Note, however, that though the above benefits are often experienced by organizations that strive to recruit and retain a diverse staff, one cannot assume that any single individual of color will have a deep understanding of all communities of color, or of the sub-communities and nuances within any one racial/ethnic group. Expecting one individual to speak for all other people of color can be frustrating for the individual and can weaken an organization's ability to become more fully inclusive.

Not surprisingly, there are also a number of costs that can be associated with failing to recruit and retain a diverse staff. Some of the costs can be measured in actual dollars - others cannot.



### ***Measurable Costs of Unsuccessful Recruitment and Retention of Diverse Staff***

Replacing an employee is expensive. Here are some of the concrete costs that you may incur as a result of losing valuable employees:

- Employee hours spent recruiting including drafting position descriptions and conducting interviews.
- Advertising costs.
- Agency/recruiter fees.
- Travel costs to interview applicants.
- Relocation costs.
- Actual dollars spent on training new employees.
- Lost hours spent training new employees.
- Legal fees for managing complaints due to violations of race-related employment laws.

### ***Note for Organizations Interested in Addressing Other Diverse Communities***

In the late 1990s the federal government estimated that the cost of sexual harassment lawsuits to federal government agencies was approximately \$133 million per year. Additional harassment-related lawsuits related to age, race, ethnicity, sexual orientation, and disability are also costly.<sup>5</sup>

Since not all costs can be measured in lost dollars or hours, it also is important to consider non-financial costs. Some of these costs can be significantly more harmful to an organization than the measurable costs.

### ***Non-Financial Costs of Unsuccessful Recruitment and Retention of Diverse Staff***

- Absenteeism and the lost productivity that comes with employees missing days of work.
- Loss of experience of talented employees in whom an organization has invested significant time and who the organization cannot easily replace.
- Loss of long-term employees who have valuable relationships with clients, donors, and co-workers - relationships that will take significant time for a new employee to establish.



As you think about the benefits and costs of recruiting and retaining staff within your organization, keep in mind the following two points:

First, organizations that have typically used simple recruitment strategies can assume that they may need to invest more time and resources up front to recruit and retain a diverse staff.

- However, organizations successfully recruiting and retaining diverse staff usually find that, over time, recruiting diverse staff becomes easier and more cost-effective.
- The more success organizations have in recruiting and retaining diverse staff, the more that success will multiply and, over time, the organization will draw new, diverse applicants as a result of the people who already work there.

Second, hiring a diverse staff is not necessarily a cure for all inclusiveness issues. Attempting to do so without taking many of the other steps necessary to create an inclusive organization, in fact, may result in negative consequences for the organization and individuals working there.

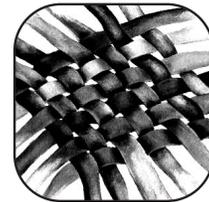
- Research has shown that, as an organization begins hiring more individuals of color, the level of attachment to the organization (i.e., absentee rates, commitment to the organization, desire to stay with the organization) can decline among some white staff members.<sup>6</sup>
- However, the cited research on this phenomenon only looks at organizations that do not explicitly attempt to create deeper inclusiveness in all aspects of their workplace.

Clearly, given the many benefits to creating a more inclusive workplace, it is better to recruit and retain a diverse workforce and engage in the other steps outlined in this workbook than it is to give up because some people may express some dismay with the challenges that come with recruiting and retaining a diverse staff.

**Complete Exercises 11-A: Benefits of Recruiting and Retaining Staff of Color, 11-B: Costs of Not Recruiting and Retaining Staff of Color, and 11-C: Analyzing Information.**

### **To Set Numeric Goals - or Not**

Before taking action to recruit and retain staff of color, give some consideration to the extent to which your organization wants to set concrete, numeric goals regarding the composition of the staff. Some organizations choose to deliberately establish diversity goals regarding staff composition.



**An example** of a diversity goal for the staff (a variation of which can be approved as official board policy to be included in the by-laws) follows:

\_\_\_\_\_ (name of organization) will ensure that the staff reflects the community that it serves in regards to race and ethnicity. According to the 2000 U.S. Census, the community we serve is comprised of 47 percent whites, 30 percent Latinos, 10 percent African Americans, 5 percent Asian Americans, 5 percent Native Americans, and 3 percent “other.” Therefore, \_\_\_\_\_ will strive for similar representation in the make-up of the staff. As demographic changes occur, we will strive to fill open positions accordingly.

Another way to approach goal setting is to start slowly and build up to a more ambitious goal. In general, organizations find the most success integrating new voices and maximizing the skills of new people when the new group (e.g., people of color, women) makes up at least 30 percent of the total (be it staff or board of directors), or, at a minimum, if there are at least three people (in a relatively small group) from the new group involved with the organization. Oftentimes the result of not having at least 30 percent or three people is that without this critical mass, the culture doesn't change and the new participants can feel isolated.

There are other advantages of establishing concrete goals:

- You're simply more likely to focus on an issue if an official goal or policy exists to remind you what your organization wants to achieve.
- In the process of building consensus, the board and staff will develop a shared commitment about the importance of reaching the goal, which will increase everyone's involvement in the effort to recruit and retain staff of color.

On the other hand, there are potential drawbacks to establishing numeric diversity goals:

- It increases the risk of hiring people of color to work in the organization who are not a good fit in other ways, just to make sure that you achieve your diversity goal. This will result in a negative experience for the organization as well as for individuals who are hired and can lead to poor staff morale and a negative reputation among communities of color.
- Focusing too much on numeric goals can make some people of color feel they are being treated like tokens.
- As you proceed through this module, keep in mind the issue of whether or not to set a concrete diversity goal for your staff. When you come to the conclusion of the module you will be asked to make a decision about this.



## Recruiting Staff Members of Color

The recruitment process has three basic steps:

1. Developing position descriptions/job qualifications
2. Announcing and advertising openings
3. Interviewing and selecting candidates

There are important issues related to inclusiveness to be considered in each of these steps.

### *1. Developing Position Descriptions/Job Qualifications*

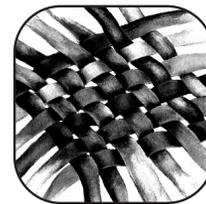
As you draft the description for a new position, it is very important to give serious consideration to the necessary qualifications. In nonprofit organizations, *knowledge of the communities that are being served* is usually a reasonable job qualification. In some cases, this kind of knowledge needs to be about a particular population group (e.g., high school students). In other cases, providing general knowledge of diverse communities is important to help an organization achieve its goals.

Developing good job descriptions also requires getting an accurate assessment of the job qualifications necessary to get a job done. Organizations should give some thought to the educational background, skills, and experiences that are truly valuable for a given position. As you attempt to diversify your pool of candidates, give some serious thought to the job qualifications that are really necessary for each position.

**For example**, in a recent report by The Denver Foundation,<sup>7</sup> one highly inclusive nonprofit organization interviewed described holding positions open as long as it takes to find candidates who are knowledgeable about and competent working with diverse communities. The organization does not hold positions open until a person of color is hired (which could be construed as racial discrimination); rather, they hold positions open until a candidate is found who has the skills they seek, who is able to understand their clients, and who thrives in an environment where inclusiveness is valued.

### *2. Announcing and Advertising Openings*

Once you develop a position description, disseminate the description widely. In many cases, nonprofit organizations utilize informal networks to find candidates for a new position. While this is an effective strategy from the point of view of identifying candidates, unless such networks are diverse, they usually don't elicit a very diverse candidate pool.



To more effectively recruit people of color, organizations should identify individuals and organizations of color that would be willing to disseminate a job description to their own informal networks. One of the best dissemination strategies is to use an electronic position description and ask people to distribute it to their contacts via email.

People and organizations of color who can distribute job descriptions through their networks might be found via the following individuals and groups:

- Current and former staff members.
- Current and former board members.
- Current and former volunteers.
- Current and former clients or constituents.
- Other nonprofit organizations (consider asking them to establish a reciprocal relationship where you agree to disseminate their position descriptions as well).
- Undergraduate and graduate schools.
- Community groups.
- Religious groups.
- Immigrant aid groups.
- Other groups with whom your organization already has a working relationship.
- Organizations that provide leadership and/or job training to individuals of color.
- Professional organizations.
- Individuals known for broad community connections.

There are also more formal strategies to utilize to ensure a more diverse pool of candidates. To begin, it helps to learn a little about the demographics of the readers of local publications. Based on that information, develop an advertising strategy that will ensure that a diverse group of readers has the opportunity to see your position announcements.

**For example**, one Denver-based nonprofit organization recently decided to stop using daily newspapers as its primary recruitment channel and now uses a combination of informal networks, web-based resources for the nonprofit community, and newspapers serving ethnic communities. The result of one recent search was that they received numerous résumés for the position from strong applicants of color, and six out of seven of the individuals interviewed were people of color; the person who ultimately filled the position was, not surprisingly, a person of color.



Once you have developed a promotion and advertising strategy that leads to a more diverse pool of candidates, be sure that everyone in the organization can benefit from what you've learned. Especially in mid-size organizations, recruitment is often done very informally and, without a human resources department, individual staff people, especially department directors, often independently recruit candidates for position openings within their respective departments. Try to streamline the process of promoting and advertising positions so that every department in the organization can take advantage of the methods that work to create a diverse candidate pool. This is too important a function to leave to chance.

Sometimes the best applicants already work at an organization, but management hasn't yet realized their potential. For this reason, it is important that all position announcements be posted internally. In addition to potentially uncovering excellent candidates of color, this practice will also send an important message to staff that the organization values their professional development and is committed to promoting from within. The importance of this practice will be discussed further in the section about retaining a diverse staff.

### ***3. Interviewing and Selecting Candidates***

Once you have a pool of candidates, the next step is to decide whom to interview and then conduct interviews. At this point in the process, it is very useful to ask a diverse group of people to review résumés and participate in interviews. As you will quickly find if you try this experiment, asking a diverse group of individuals to review resumes will probably result in a bigger, more diverse pool of candidates to interview than you might select on your own. People with different backgrounds tend to value different skills and experience and evaluate candidates based on slightly different criteria.

Once the candidates to be interviewed are selected, invite the diverse group of individuals who reviewed the résumés to join you for the interviews. Having a diverse group of individuals involved in the hiring process is beneficial for three reasons:

1. You're more likely to get a balanced perspective about the skills and backgrounds of each interviewee.
2. Candidates of color will probably be more comfortable in the interview process if there are others present who have a similar cultural background.
3. It is more likely that the questions asked will elicit information about a candidate's knowledge of diverse communities.



Be sure to let interviewers know how much you appreciate, and will take into account, their candid, honest feedback about the candidates, and provide the interviewers with clear information about your decision-making process for the position. If you do so, you will be more likely to receive valuable information that will help your organization to select the best candidate for the job. If you follow most or all of the suggestions in this section, the pool of candidates that you have to choose from when hiring staff people should be significantly more diverse than before you began experimenting with these practices.

### **Retaining Staff Members of Color**

As stated earlier in this module, there are plenty of costs involved with replacing staff once they leave an organization. And, there are plenty of reasons why people leave organizations.

- In many cases, people leave for better-paying positions, new challenges, and so on.
- Sometimes people leave because they feel that they have not been treated with respect.

The following strategies for retaining staff members of color can result in better experiences for staff and increased productivity and effectiveness for the organization. These strategies fall into two categories:

- Management Practices
- Policies

#### ***Management Practices***

Good management practices have a positive effect throughout the organization, including on the retention of staff of color. Good management techniques will help identify and minimize the degree to which bias influences managers' decisions and their treatment of people from diverse backgrounds. Conversely, ineffective managers can sometimes unknowingly exacerbate cultural tensions in the workplace.

**For example,** ineffective managers may have challenges with communicating, or they may unknowingly make remarks that offend people of diverse racial and ethnic backgrounds.

To help create a healthy workplace for people from all backgrounds, you might consider implementing some of the following suggestions.



## Formal Evaluations

Many managers in the nonprofit sector do not conduct formal evaluations of their staff or do not conduct thorough, full evaluations. An effective evaluation process, however, can uncover a lot about how an individual behaves toward others, especially toward people from diverse backgrounds.

If disrespectful behavior is identified early, then there is a possibility it can be rectified.

- Unfortunately, disrespectful behaviors are often identified only after becoming a major problem and result in either the termination of the offending person and/or the resignation of the offended person.
- Either way, there's a significant cost to the organization.

## Core Competency of Contributing to an Inclusive Workplace

Depending on your performance review process, you might find it useful to specify that you expect staff to contribute to creating an inclusive workplace and that they will be evaluated, in part, on their ability to do so. If you decide to implement this tactic, be sure to clarify what is meant by “contributing to an inclusive workplace.” Some possibilities include:

- Active participation as a member of the Inclusiveness Committee.
- Active participation in inclusiveness training (see *Module 2* for more information about training).
- Welcoming and respectful of clients of all backgrounds.
- Implementation of a particular strategy or strategies within the inclusiveness blueprint.

## Equalizing Formal and Informal Professional Development Opportunities

Not surprisingly, people sometimes single out individuals in whose professional development they want to invest. Many factors go into an individual's personal preferences about whom they want to work with, who they want to see advance within the organization, and who they decide to mentor formally or informally. The organization's culture can also play a role in who is given opportunities to develop skills that will help them advance. Traditionally, many organizations operated with a cultural norm that looked much like “the good ol' boys' network,” in which many activities related to professional development occurred informally, during social activities in which not all members of an organization were involved. Some nonprofit organizations continue to operate within this cultural framework or some variation of it.

It is often the informal opportunities that have an impact on an individual's development and enthusiasm for the work.



**For example**, to minimize bias that affects professional development opportunities, look at who is invited to attend meetings and represent the group at external events. Also, look at who is encouraged to take on new responsibilities that challenge them above and beyond their usual job responsibilities. A quick survey of staff to ask them what types of opportunities they feel influence their ability to advance within the organization will probably illuminate some key areas on which to work.

Organizations can also develop formal professional development policies which ensure that everyone at the same level can take advantage of training and educational opportunities equally. During the budgeting process, if you have a line-item for professional development, be sure to establish guidelines for use of professional development funds.

*See Sample 11-D: Sample Professional Development Plan*

### **Establish a Meaningful Exit Interview Process**

The exit interview process presents an opportunity for organizations to learn about their culture and practices. The opening section of this module cites a survey which found that 63 percent of African Americans, as opposed to 26 percent of whites said that race was a moderate to great source of tension in their workplace. Thus, white managers may sometimes perceive that their organizations are addressing racial tensions when, in fact, from the point of view of some of the people of color within these organizations, they are not. If you follow the other recommendations provided in this module, hopefully you will find out this information before someone decides to quit. But, if all else fails, the exit interview can be a useful tool for discovering unresolved racial tensions in the workplace.

Many organizations make the mistake of undervaluing the exit interview process. Instead of interviewing outgoing staff people, they simply ask them to fill out a questionnaire. Note that some people may be more comfortable offering feedback in written format, so it might be best to provide both written and verbal opportunities for feedback. However, if someone leaves an organization, at least in part as a result of unresolved racial/ethnic tensions, he/she may not be willing to share reasons for leaving in a questionnaire. Additionally, there are often subtle nuances related to an individual's decision to leave about which you might want to know.



**For example**, a staff person may decide to leave because he/she “received a better opportunity with another organization.” Underneath this stated reason, there could be an issue related to inclusiveness that you might be able to discover by asking probing questions, such as that the new opportunity is seen as a “better opportunity” because the new organization is better at addressing inclusiveness.

Exit interviews should be conducted by staff and/or board members sensitive to these issues who will ask insightful questions to elicit more information about the reasons behind an individual's decision to quit. Staff members responsible for doing the interviews should be trained to conduct effective exit interviews. It is also wise to have someone who did not directly supervise the exiting staff member act as the interviewer, to prevent concerns that opinions expressed in the interview will affect future references for the departing employee. Consider having two people conduct the exit interview.

And, perhaps most importantly, there need to be procedures for reviewing the information obtained in the interview process. In general, it is not valuable for a staff person to complete an exit interview and place the responses into the departing employee's personnel file without any broader analysis of why people leave the organization. Results from exit interviews can be very illuminating and should be taken seriously by the organization's management.

### ***Policies***

Various policies related to hiring, firing, and management of employees can have an impact on staff retention. Again, some policies, such as a conflict resolution policy, that do not relate directly to inclusiveness can have an indirect effect on staff retention. Remember, policies are only as effective as the people who implement them. Violation of policies can result in lawsuits, so it is important not only to follow the policies created but also to train staff to comply with all personnel policies.

*The following information on personnel policies is presented for illustrative purposes only. The authors make no representation as to the legal sufficiency or effect of these policies. Actual policies should be developed by legal counsel.*

### **Equal Employment Opportunity/Non-Discrimination Policy**

Creating an Equal Employment Opportunity Policy, or a Non-Discrimination Policy as it is often called, provides a basic foundation for creating an inclusive organization. The purpose of an EEO policy is to articulate the organization's commitment to complying with federal, state, and local nondiscrimination laws that prevent discrimination on the basis

of a number of characteristics. In some cases, organizations also include a commitment to nondiscrimination based on other characteristics, such as sexual orientation.



Federal law prohibits employment discrimination on the following bases:

- Race
- Color
- Religion
- Sex (Gender)
- Age (40 and over)
- National Origin
- Disability

Various state and local laws extend employment protection on the basis of other characteristics as well, such as marital status.

**Example - The Denver Foundation's Anti-Discrimination Policy**

The Denver Foundation shall not discriminate on the basis of race, color, religion (creed), gender, age, national origin (ancestry), disability, marital status, sexual orientation, or military status in any of its activities or operations. These activities include, but are not limited to, hiring and firing of staff, selection of volunteers, selection of vendors, and provision of services.

If your organization doesn't have an EEO policy, seek appropriate legal advice regarding these matters.

### Other Policies

Seek legal counsel who can help you develop other employment policies that will help you retain staff and create a more inclusive workplace. The types of policies that you may want to talk to consider include:

- Unlawful EEO Harassment Policy
- Sexual Harassment Policy
- EEO Complaint Procedure
- Standard of Conduct for Language
- Family Friendly Policies (such as flex time, on-site child care, etc.)
- Grievance Procedure Policy
- Conflict Resolution Policy



In addition to helping an organization avoid costly lawsuits, many of these policies can provide staff members with clear guidance on how to resolve issues that may make them feel uncomfortable and may affect their productivity.

**For example**, the Standard of Conduct for Language policy and the Conflict Resolution Policy can lead to a more inclusive workplace where people from any background can feel secure in knowing how to address issues of concern to them. Remember that hostile language can make people from any racial/ethnic or other background uncomfortable and therefore the positive impact of such a policy - if it is followed - can resonate throughout the organization.

**Complete Exercise 11-E: Developing an Action Plan for Personnel.**

**Track your progress in completing Module 11 on the *End-of-Module Checklist*, located after the exercises.**

<sup>1</sup> Center for Creative Leadership, "Leading in Black and White Poll Results." November, 2002 e-Newsletter.

<sup>2</sup> Cox, Taylor, *Developing Competency to Manage Diversity*, San Francisco, CA: Berrett-Koehler Publishers, Inc, 1997.

Sullivan, John, "Diversity Recruiting - The Compelling Business Case." From [www.multiculturaladvantage.com](http://www.multiculturaladvantage.com)

<sup>3</sup> Cox, Taylor, *Developing Competency to Manage Diversity*, pg. 37.

<sup>4</sup> Cox, *Ibid*, pg. 38.

<sup>5</sup> Cox, *Ibid*, pg. 41.

<sup>6</sup> Fagenson, Ellen, "Is What's Good for the Goose Also Good for the Gander?," 1993, cited in Cox, Taylor, *Developing Competency to Manage Diversity*, pg. 24. San Francisco, CA: Berrett-Koehler Publishers, Inc., 1997.

<sup>7</sup> Pease, Katherine & Associates, *Inside Inclusiveness: Race, Ethnicity, and Nonprofit Organizations*. The Denver Foundation, July, 2003

<sup>8</sup> Society of Human Resource Managers, Equal Employment Opportunity, SHRM.org

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## EXERCISE 11-A

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### Benefits of Recruiting and Retaining Staff of Color

**Instructions:**

*Write down all of the benefits that you can think of that could result from successfully recruiting and retaining staff members of color. In addition to the points that are discussed in the module, think about benefits that might be specific to your particular organization.*

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**Date Exercise Completed** \_\_\_\_\_



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## EXERCISE 11-B

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### Costs of Not Recruiting and Retaining Staff of Color

**Instructions:**

*Write down all of the costs that you can think of that could result from failing to recruit and retain staff members of color. In addition to the points that are discussed in the module, think about costs that might be specific to your particular organization.*

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**Date Exercise Completed** \_\_\_\_\_



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## EXERCISE 11-C

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### Analyzing Information

**Instructions:**

Refer to Module 7: Information Gathering, Part 3: Compiling Results

- *Exercise 7-C: Available Facts: Compiling Other Information*
- *Exercise 7-G: Stakeholder Perspectives: Compiling Likert Scale Responses*
- *Exercise 7-H: Stakeholder Perspectives: Compiling Narrative Responses*

Select and review the information that pertains to mission and organizational values.

Answer the questions below.

**Available Facts**

Are there any ways in which your organization's staff is more or less diverse than your community?

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continued

**EXERCISE 11-C: Analyzing Information *continued***

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Are there any ways in which your staff is more or less diverse than other organizations in your field?

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Are there any best practices from the field regarding recruitment and retention of staff that are useful to you?

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Can you identify any trends related to recruiting and retaining staff that are relevant to your inclusiveness initiative?

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continued

**EXERCISE 11-C: Analyzing Information *continued***

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Did you notice anything else about recruiting and retaining staff from the results of the existing data scan?

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**Stakeholder Perspectives**

Are there any salient themes about staff recruitment and retention that were identified by a majority of your stakeholders?

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In what ways are the organization's practices regarding staff recruitment and retention perceived by different stakeholder groups to be effective or ineffective?

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continued

**EXERCISE 11-C: Analyzing Information *continued***

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Do stakeholders believe that the organization is successful in identifying and recruiting staff members of color? In what ways do stakeholders perceive your organization to be successful or unsuccessful?

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Do stakeholders believe that the organization is successful at retaining staff members of color?

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Are there any stories or strongly held beliefs regarding recruitment and retention of staff members of color that were identified by stakeholders?

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continued

**EXERCISE 11-C: Analyzing Information *continued***

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Are there any significant inconsistencies in perspectives among groups of stakeholders regarding recruitment and retention of staff members of color?

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Can you identify any trends about how your organization recruits and retains staff of color based on the perspectives of your stakeholders?

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Did you notice anything else regarding the stakeholder perspectives in relation to recruitment and retention of staff members of color?

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continued

**EXERCISE 11-C: Analyzing Information *continued***

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Is there any additional information related to staff that currently isn't available that you would like to collect in the future?

\_\_\_ yes \_\_\_ no

If YES, what information would be helpful?

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***Date Exercise Completed*** \_\_\_\_\_

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## SAMPLE 11-D

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### Sample Professional Development Plan

\_\_\_\_\_ (organization) values individual contributions to our shared mission. As a group, you and other managers and supervisors have worked hard to hire staff members who are bright and talented. As \_\_\_\_\_ (organization) continues to attract highly qualified staff members at support and middle management levels, the long-term reality is that some of these individuals will need to “move on to move up.” However, there are steps that \_\_\_\_\_ (organization) will take to help maintain a satisfied, highly functioning, and productive staff at all levels.

The goals of this procedure are to:

- Support the professional development of staff members, even when this results in their leaving the organization.
- Maintain the satisfaction and productivity of \_\_\_\_\_ (organization) employees at all levels of the organization.
- Articulate \_\_\_\_\_’s role as a training ground for nonprofit leaders.

The objectives for this procedure are to:

- Assist all staff in creating individual professional development plans.
- Reduce turnover of support and mid-level staff.
- Increase productivity and job satisfaction among support and mid-level staff.
- Increase staff referrals for open positions.
- Increase the percentage of departing staff members who move from the Foundation to other positions and lifetime careers in the nonprofit sector.

Supervisors and vice presidents are the primary mentors for employees seeking professional development opportunities. This procedure offers tools to facilitate a twice-yearly discussion of professional development between you and each of your direct reports.

continued

## EXERCISE 11-D: Professional Development Plan *continued*

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### Steps:

- At each mid-year and annual review, the supervisor and employee will work together to fill out the individual professional development plan (*Attachment A*).
- Both the supervisor and the employee will work with the menu of opportunities available in writing and on the Intranet. This menu is developed to stimulate discussion, and should not be considered an exhaustive or complete list of professional development opportunities.
- The supervisor is responsible for following up with the employee, as outlined in the development of the plan, between reviews.
- The employee is responsible for taking action on his/her behalf, as outlined in the plan.
- At each review, the plan will be revisited, discussed, and updated as necessary.
- Employees and supervisors are invited to share their anonymous or specific feedback on the review form and professional development process with the executive director. Reflections on the process are welcome at any time, but will be specifically solicited on an annual basis.

continued

**EXERCISE 11-D: Professional Development Plan *continued***

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***Attachment A: Individual Professional Development Plan***

\_\_\_\_\_ (organization) encourages every employee to pursue his or her professional goals. This plan is a tool to facilitate that work. The plan is to be completed by the supervisor and employee before and/or during an employee's annual review. They agree to revisit the plan twice during the year to mark progress and make adjustments.

Date \_\_\_\_\_

**To be completed by the employee**

My goals related to my current position are:

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My goals related to future professional development are:

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In order to work toward these goals, I would like to take the following steps in the coming year:

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**EXERCISE 11-D: Professional Development Plan *continued***

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**To be completed by supervisor**

\_\_\_\_\_ (organization) is  
able to support these steps in the following ways:

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\_\_\_\_\_  
Employee Signature

\_\_\_\_\_  
Supervisor Signature

Reviewed: \_\_\_\_\_ (1<sup>st</sup> review date) \_\_\_\_\_ (2<sup>nd</sup> review date)

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## EXERCISE 11-E

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### Developing an Action Plan for Personnel

**Instructions:**

*Using the following template, record the problem statement, goals, etc., as well as the steps that you will take to accomplish your goals. Remember that every organization usually has its own way of defining goals and objectives. The outline below can be tailored to match your organization's usual planning process.*

(1) What is the primary staff-related inclusiveness issue you want to address?

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(2) What is/are your desired goal(s)?

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(3) For each goal, what is/are your desired outcome(s)?

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continued

**EXERCISE 11-E: Developing an Action Plan for Personnel *continued***

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(4) For each goal, what are the primary objectives you hope to accomplish?

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(5) For each objective, what tasks will you complete to accomplish the objective?

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(6) Who will be responsible for completing each task?

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continued

**EXERCISE 11-E: Developing an Action Plan for Personnel *continued***

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(7) When will the objectives and tasks be completed?

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(8) What resources, financial and otherwise, are necessary for achieving each goal?

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***Date Exercise Completed*** \_\_\_\_\_



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## END-OF-MODULE CHECKLIST

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### Module 11

| <i>Action Item</i>  | <i>Date Completed</i> | <i>Notes</i> |
|---|-----------------------|--------------|
| Review content on developing a more diverse and inclusive staff.                |                       |              |
| Analyze the information gathered about personnel.                               |                       |              |
| Develop an action plan to accomplish goals and objectives.                      |                       |              |
| Recognize your progress to date and communicate it to appropriate stakeholders. |                       |              |