

MODULE 4: MAKING THE CASE FOR INCLUSIVENESS



Who Should Create the Case Statement

Developing an inclusiveness definition and case statement is integral to a successful inclusiveness initiative. As such, it is important that many people in your organization embrace them as guiding principles for the organization. In general, the more people who are involved in providing input regarding the definition and case statement, the better. However, it is also important that your organization make measurable progress, so you should not develop a cumbersome, drawn out process that discourages people. Strive for a middle ground between too much and too little input from key stakeholders that works for your organization.

“Human diversity makes tolerance more than a virtue; it makes it a requirement for survival.”

-Rene Dubos

Three main groups may or may not be involved. In addition, consider three different activities within the process.

First, consider who will be involved in creating the case statement. The three main groups to think about are:

1. Inclusiveness Committee
2. Board of Directors
3. Staff

Second, consider the level at which each group will be involved. Here are the basic levels:

1. Providing input to the discussion.
2. Developing a draft definition and case statement.
3. Approving the definition and case statement.

Complete Exercise 4-A: Deciding Who Will Create and Approve the Case Statement.

Definitions

Let's review the differences between the terms “diversity” and “inclusiveness,” as mentioned in the Introduction.

- **Diversity** describes *one* aspect of inclusiveness: the extent to which an organization has people from diverse backgrounds or communities involved as board members, staff, and/or volunteers.



- **Inclusive** organizations, on the other hand, not only have diverse individuals involved but, more importantly, they are learning organizations that value the perspectives and contributions of all people, and they incorporate the needs, assets, and perspectives of communities of color into the design and implementation of universal and inclusive programs. Furthermore, inclusive organizations recruit and retain diverse staff and volunteers to reflect the racial and ethnic composition of the communities they serve.

Some people have tried to adapt the term “diversity” to encompass the full range of inclusiveness/diversity related issues. David Thomas and Robin Ely do so in their report on diversity published in the *Harvard Business Review* in 1996:

“Diversity goes beyond increasing the number of different identity-group affiliations on the payroll to recognizing that such an effort is merely the first step in managing a diverse workforce for the organization’s utmost benefit. Diversity should be understood as the varied perspectives and approaches to work that members of different identity groups bring.”

Others have found that differentiating between the terms diversity and inclusiveness emphasizes that representation of diverse communities within an organization does not always lead to deeper respect for and incorporation of the needs, assets, and viewpoints of diverse communities.

This workbook focuses on the concept of inclusiveness rather than diversity, except when diversity is used to refer to the presence of people from diverse communities within an organization’s infrastructure.

Complete Exercise 4-B: Defining Inclusiveness and Diversity for Your Organization.

Note for Organizations Interested in Addressing Other Diverse Communities

Organizations that are taking a broad approach should consider other historically marginalized groups when creating their definitions. Think about how your definitions incorporate members of those communities that you have included in your initiative. For example, an early childhood education organization might ask itself what inclusiveness means to the organization in terms of gender. Or, an organization that provides services to low-income people might reflect on what inclusiveness means to its work in regards to class.

Visualizing Greater Inclusiveness

It is important to think about how becoming more inclusive might improve your work and your work environment. Inclusiveness affects many aspects of your work: overall mission, programs, operations, fundraising, communications, staffing and volunteers, and organizational culture. (See the Introduction for a review of the ways in which inclusiveness can benefit an organization.)



Complete Exercise 4-C: Visualizing Greater Inclusiveness.

Costs of Not Being Inclusive

There may be considerable costs associated with not engaging in an inclusiveness initiative.

Consider both **hard costs** that impact your organization's income and expenses and **soft costs** that do not have a dollar impact but that may incur other kinds of costs to the organization. Hard costs include missed opportunities for donations from individuals of color, less funding from foundations, missed government contracts, fewer clients, and increased expenses for staff recruitment due to high turnover. Soft costs include low staff and/or board morale, fewer innovative ideas because of a homogenous staff or board, and an unwelcoming environment to potential or current volunteers, staff, donors, clients, and board members. Organizations may find that failing to be inclusive affects their ability to communicate their message with intended audiences and to fully understand what these audiences are communicating back. Not being inclusive can affect an organization's ability to meet the needs of its clients, to reach out to and serve potential clients in need of its services, and to meet its mission effectively.

For example, an arts and culture organization that is not fully inclusive may find that their audience does not include people from different racial or ethnic backgrounds. This may affect the funding they receive, their audience numbers, and their ability to provide enriching cultural experiences to all members of their community.

A health organization that does not have materials written in the languages of their patients or staff that fluently speak these languages may find that their ability to effectively serve these patients is compromised.

A human services organization that has an ethnically homogenous board of directors may find that their ability to raise funds from diverse communities and fully understand the needs of their more diverse clients is compromised.



Note: Lawsuits are another potential cost of not being inclusive. This workbook does not provide any legal advice or direction. You should consult with your legal counsel for information about potential lawsuits and legal compliance with equal opportunity laws.

Considering the costs associated with not engaging in an inclusiveness initiative is an important task in your process. If your group ever loses sight of why it is engaging in an inclusiveness initiative, the results of this task will remind you of the importance of this work.

Note for Organizations Interested in Addressing Other Diverse Communities

Organizations that have a focus beyond race and ethnicity should consider the costs of not being inclusive of other diverse groups. For example, an organization might evaluate how a lack of accessibility at their offices might affect the disabled community's ability to serve as volunteers. Or an organization might consider whether being open for services only during weekday business hours will affect the ability of lower income clients with little job flexibility to access their services. Another organization might consider the effect that its policy to provide health care benefits only to married couples has on its ability to recruit and retain staff members from the GLBT community.

Complete *Exercise 4-D: Costs of Not Being Inclusive.*

Writing a Case Statement

A case statement is an important element of every organization's inclusiveness initiative.

Your Inclusiveness Committee, with input from other stakeholders, should develop your case statement. Ultimately, the board of directors should ratify the statement. You will revisit the case statement after you have completed your blueprint to make sure that it still reflects the needs of the inclusiveness initiative; thus, it need not feel final at this time.

The case statement incorporates your organization's definition of inclusiveness, the general benefits you hope to gain by becoming more inclusive, and a description of how you plan to put your commitment to inclusiveness into action. You might also think of it as an inclusiveness mission or vision statement with a little more detail.

When your case statement is completed, post it somewhere in the organization where people can see it. This will give your staff and volunteers a clear reminder of why you are engaging in this work. The statement also will remind them to give you feedback on its relevance as you continue to engage in an inclusiveness initiative.



Review Sample 4-E: Sample Inclusiveness Case Statements and complete Exercise 4-F: Writing Your Case Statement.

Track your progress in completing Module 4 on the End-of-Module Checklist, located after the exercises.

¹Thomas, David A., Harvard University Graduate School of Business Administration and Robin Ely, Columbia University, "Making Differences Matter: A New Paradigm for Managing Diversity," *Harvard Business Review*, September 1, 1996.

Module 4: Creating the Case for Inclusiveness

The CHC Inclusiveness Committee convenes its first sessions with the staff and Board regarding inclusiveness. The meetings will give the committee input so that they can develop a case statement for the inclusiveness initiative.

The Center's eighteen employees were assembled in the conference room. The meeting was a lunch potluck that would extend into the afternoon, and people had brought a myriad of dishes, from enchiladas to Cobb salad to barbecued ribs. Joe noticed that the staff sat mostly in groups according to whether they had administrative or professional duties. Only Melody broke ranks, sitting between her fellow Inclusiveness Committee members, Marcie and Luisa.

"Hi everyone, and welcome," said Joe. "I'd like to introduce Ed Williams. He's going to be working with us through the process of improving the inclusiveness of the Center." Joe spoke about Ed's background, and then Ed stood up.

"Thanks for having me here, and thank you for your willingness to take the journey we're about to embark on," said Ed. "This is important work, and you're to be congratulated on your commitment to making it happen. Now," he pulled the cap off of a marker and turned to a flip chart on which he'd written the day's agenda. "Our main goal today is to establish a basis for why we're doing this work. We're going to think about a definition for inclusiveness, in terms of what it means for this organization. Then we'll look at the benefits and costs of becoming more inclusive. Finally, we'll end the day with an overview of what's next. Does that sound

straightforward?" Several team members nodded.

"First, though, I'd like to ask Joe and the other members of the Inclusiveness Committee to set the stage by sharing why they think this work is important," Ed said.

Joe began, "You all heard about my experience at the hospital during our retreat a month or so ago. What you don't know is that my commitment to this work started much further back, when I was a resident." Joe shared a story about how he had witnessed one of the supervising doctors using a dramatically different bedside manner with white patients and patients of color, and that this resulted in different treatment outcomes for the patients. Marcie then described the challenges that she had faced over the years, as a black woman in a field that was dominated by men. Melody told the staff about a situation where a co-worker in a previous job had assumed she was "good at math" because she was Asian.

Other members shared similarly affecting and personal stories, each ending with a commitment to helping CHC build inclusiveness. Eleanor was the last person to speak. She appeared visibly moved by what she had heard. "I'm going to be honest with everyone," she said. "I was only doing this because I thought my new boss wanted me to." Joe frowned with concern. Eleanor continued, "I really thought, we have a great organization and we don't have problems in these areas. But now, after hearing these stories and reading the materials in the workbook, I think this is a good thing to do. Even if we're just making sure that none of these stories could happen here."

Marcie, who was sitting next to Eleanor, gave her colleague's hand a squeeze.

"Thank you, Eleanor," said Ed. "Now it's time to think about a definition of inclusiveness, and the benefits and costs for becoming more inclusive," said Ed. "The Inclusiveness Committee will be taking your input from today, and the input from the Board in a similar session, and developing a draft case statement for you to look at. You will then approve the final version of the case statement before our next session together."

In the middle of the following week, Ed sat in the conference room with the CHC Board of Directors. He reviewed an agenda that was similar to the staff's, though discussion times would be somewhat abbreviated. Then he asked Beth, Jeff, and Joe to set the stage.

After Joe finished describing his experiences at the hospital, Jeff said simply, "Folks, I work for a company that reaches out to the Latino community as customers. We tried doing this without having people who understood the culture on staff. It didn't work. This convinced me that you have to pay attention to culture when you do business, and the business of the Center is no different."

Before she spoke, Beth looked around at the nine other Board members, all of whom were white and well-dressed. "I want to tell you about my son-in-law," she said. "His name is Jorge Medina." Beth described her son-in-law's upbringing as the child of migrant farm workers, his struggles to make his way in school, his acceptance to Stanford, and his success as an attorney. "As I've gotten to know Jorge,

I've come to understand that his experiences in our society are different from mine. I tell you his story because I want you to understand how personal this work is to me. I want to do my part to make the world, and especially my corner of it, as accepting and inclusive as possible."

Beth took a deep breath. Joe leaned over and whispered, "I think you got to them." Several members of the Board were already raising their hands in response to Ed's request for feedback on the definitions of inclusiveness he had distributed. After recording their input, Ed passed out the staff's responses to the worksheets (4-C and 4-D) about the benefits and costs of becoming more inclusive.

Mrs. Dreyfuss, who hadn't yet spoken, reviewed the responses and raised her hand. "This says we may be raising less money in years to come if we don't emphasize reaching out to different communities. How can that be true? This Board has always been good at raising money."

Ed gave her an overview of the changing demographics of the community, and he encouraged her to note that the staff had already come up with several suggestions about how fundraising might be different if the organization were more inclusive.

"Well," she said, "I hadn't realized that this discussion would change everything."

Joe and Beth looked at each other and smiled. This wasn't going to be easy, but they were making progress.