

INCLUSIVENESS AT WORK

HOW TO BUILD INCLUSIVE NONPROFIT ORGANIZATIONS



Katherine Pease

With

Rebecca Arno, Lauren Casteel, Judy Gordon, Lesley Kabotie,
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THE DENVER FOUNDATION

Denver, Colorado


INCLUSIVENESS AT WORK:

HOW TO BUILD INCLUSIVE NONPROFIT ORGANIZATIONS

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DISCLAIMERS

This workbook sets forth a suggested model and plan to assist nonprofit organizations in their efforts to become more inclusive. This workbook necessarily contains generalizations regarding both nonprofit organizations as a whole and the behaviors of different racial, ethnic, and social groups. How specific organizations, groups, or individuals respond and behave in particular situations, of course, will depend on their individual circumstances. As a result, neither the authors nor The Denver Foundation can guarantee that following the model and plan set forth in this workbook will result in a more inclusive organization or that the organization will be successful in any other way.

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TABLE OF CONTENTS

IntroductionXI

- What Will Our Organization Achieve by Completing This Workbook?
- Who Should Use This Workbook?
- Is This Workbook Valuable for Our Organization if We Want to Address Race, Ethnicity, AND Other Types of Diversity?
- What Is Inclusiveness?
- Why Should Nonprofits Invest Time and Energy in Becoming More Inclusive?
- What Is an Inclusiveness Initiative?
- What Is Included in the Workbook?
- Is It Necessary to Complete All Eighteen Modules?
- Does It Matter in What Order Modules Are Completed?
- How Does An Organization Work Through Each Module?
- Is This Workbook Designed to Be Completed With the Help of Consultants?
- How Much Will It Cost to Complete an Inclusiveness Initiative?
- How Long Will It Take to Complete an Inclusiveness Initiative?
- How Long Should the Inclusiveness Blueprint Last an Organization?
- Will Organizations Be Finished After Completing Module 18?
- What’s the First Step?

Is This Workbook Right for Your Organization? A Pre-Test

Step 1: Creating an Inclusiveness Committee

Module 1: Creating a Structure for Your Initiative: People and Communications 1

- Overview of Content
- Establishing Roles and Responsibilities
 - Roles and Responsibilities of the Executive Director/CEO
 - Roles and Responsibilities of the Board of Directors
 - Roles and Responsibilities of Senior Staff/Management Staff
 - Roles and Responsibilities of Direct Service and Administrative Staff
 - Roles and Responsibilities of the Inclusiveness Committee



- Responsibilities of the Inclusiveness Committee Chairperson
- Forming Your Inclusiveness Committee
- Involving the Whole Organization Through Effective Communications
- Do You Need Consultants?
- CHC Case Study: Module 1
- *Sample 1-A: Sample Job Description for Inclusiveness Committee Members*
- *Exercise 1-B: Forming Your Inclusiveness Committee*
- *Exercise 1-C: Creating Effective Communications*
- *End-of-Module Checklist*

Step 2: Engaging in Inclusiveness/Diversity Training and Hiring Consultants/Trainers

Module 2: Inclusiveness Training 15

- Overview of Content
- What Is Inclusiveness Training?
- Relationship to the Inclusiveness Blueprint
- Who Should Participate in Training Programs
- When to Do Inclusiveness Training
- Approaches to Inclusiveness Training
- Variables in Training Approaches
- Benefits and Limitations of Training Approaches
- Developing Training Goals
- Selecting a Training Approach That Is Right for Your Organization
- Setting Training Expectations
- Forming/Storming/Norming/Performing
- Training Format
- Who Does the Training and How Much Should It Cost?
- CHC Case Study: Module 2
- *Exercise 2-A: Selecting a Training Approach That Is Right for Your Organization*
- *Exercise 2-B: Summarizing Inclusiveness Training Program Decisions*
- *End-of-Module Checklist*



Module 3: Hiring Inclusiveness Consultants 33

- Overview of Content
- Why Hire a Consultant?
- Role of a Consultant
- Who Is Responsible for Hiring a Consultant?
- Qualifications of a Consultant
- Inclusiveness and Diversity Training: Consultants' Training Strategies Vary
- Budgeting for a Consultant
- Developing a Request for Proposals (RFP)
- Identifying Consultant Prospects
- Interviewing Consultants
- Checking References
- Selecting a Consultant and Creating a Contract
- Monitoring Progress
- CHC Case Study: Module 3
- *Exercise 3-A: Determining Whether or Not to Hire a Consultant*
- *Exercise 3-B: Identifying the Roles and Qualifications of a Consultant*
- *Sample 3-C: Sample Request for Proposals*
- *Exercise 3-D: Identifying Consultant Prospects*
- *Sample 3-E: Sample Interview Questions*
- *End-of-Module Checklist*

Step 3: Defining Inclusiveness and Diversity and Creating the Case for Inclusiveness for Your Organization

Module 4: Creating the Case for Inclusiveness 43

- Overview of Content
- Who Should Create the Case Statement
- Definitions
- Visualizing Greater Inclusiveness
- Costs of Not Being Inclusive
- Writing a Case Statement
- CHC Case Study: Module 4
- *Exercise 4-A: Deciding Who Will Create and Approve the Case Statement*
- *Exercise 4-B: Defining Inclusiveness and Diversity for Your Organization*



- *Exercise 4-C: Visualizing Greater Inclusiveness*
- *Exercise 4-D: Costs of Not Being Inclusive*
- *Sample 4-E: Sample Inclusiveness Case Statements*
- *Exercise 4-F: Writing Your Case Statement*
- *End-of-Module Checklist*

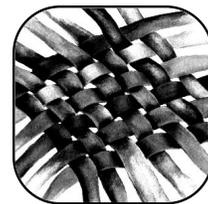
Step 4: Gathering and Analyzing Information Including Available Facts and Stakeholder Perspectives Regarding Your Community, Your Field, and Your Organization

Module 5: Information Gathering, Part 1: Available Facts 51

- Overview of Content
- Developing Your Scope and Strategy
- CHC Case Study: Module 5
- *Exercise 5-A: Defining Community*
- *Exercise 5-B: Selecting Facts to Collect About Your Community*
- *Exercise 5-C: Defining Your Field*
- *Exercise 5-D: Selecting Facts to Collect About Your Field*
- *Exercise 5-E: Selecting Facts to Collect About Your Organization*
- *Exercise 5-F: Community Fact-Gathering Work Plan: Topic, Source, and Person Responsible*
- *Exercise 5-G: Field Fact-Gathering Work Plan: Topic, Source, and Person Responsible*
- *Exercise 5-H: Organizational Fact-Gathering Work Plan: Topic, Source, and Person Responsible*
- *End-of-Module Checklist*

Module 6: Information Gathering, Part 2: Stakeholder Perceptions..... 55

- Overview of Content
- Descriptions of Information-Gathering Tools
- CHC Case Study: Module 6
- *Exercise 6-A: Identifying Internal and External Stakeholders*
- *Exercise 6-B: Reviewing Information-Gathering Topics*
- *Exercise 6-C: Putting It All Together*
- *End-of-Module Checklist*



Module 7: Information Gathering, Part 3: Compiling Results 61

- Overview of Content
- Selecting Someone to Compile the Information
- Compiling Available Information
- Tips for Compiling the Data on Stakeholder Perspectives
- Tips for Compiling Focus Group Responses
- Analyzing Information
- CHC Case Study: Module 7
- *Exercise 7-A: Identify Who Will Be Responsible for Compiling Data*
- *Exercise 7-B: Available Facts: Making Numerical Comparisons*
- *Exercise 7-C: Available Facts: Compiling Other Information*
- *Sample 7-D: Sample Survey of Stakeholder Perspectives*
- *Sample 7-E: Sample Stakeholder Perspectives Likert Scale Responses*
- *Sample 7-F: Sample Stakeholder Perspectives Narrative Responses*
- *Exercise 7-G: Stakeholder Perspectives: Compiling Likert Scale Data*
- *Exercise 7-H: Stakeholder Perspectives: Compiling Narrative Responses*
- *Exercise 7-I: Stakeholder Perspectives: Compiling Focus Group Responses*
- *End-of-Module Checklist*

Step 5: Completing an Inclusiveness Blueprint That Spells Out Concrete Goals, Objectives, and Tasks to Help Your Organization Realize the Change it Seeks

Module 8: Creating the Framework for an Inclusiveness Blueprint 67

- Overview of Content
- What Is an Inclusiveness Blueprint?
- Creating the Blueprint
- Preliminary Analysis of the Data and Prioritization of Categories
- Check in on Your Process and Celebrate Your Progress!
- CHC Case Study: Module 8
- *Exercise 8-A: Prioritizing Categories for Your Inclusiveness Blueprint*
- *Exercise 8-B: Creating a Framework for Your Inclusiveness Blueprint*
- *Exercise 8-C: Reviewing Your Process*
- *End-of-Module Checklist*



Module 9: Mission and Organizational Values..... 79

- Overview of Content
- Organizational Mission Statements
- Organizational Values Statements
- *Exercise 9-A: Current Mission and Values Statements*
- *Exercise 9-B: Benefits of Inclusive Mission and Values Statements*
- *Exercise 9-C: Analyzing Information*
- *Exercise 9-D: Deciding What to Include in the Blueprint*
- *End-of-Module Checklist*

Module 10: Board of Directors 83

- Overview of Content
- Why Creating an Inclusive Board of Directors Matters
- Why Board Composition Matters
- To Set Numeric Goals—or Not
- Developing a More Diverse and Inclusive Board of Directors
- What to do When a Potential Board Member Says “No”
- CHC Case Study: Module 10
- *Exercise 10-A: Benefits of Having a More Diverse and Inclusive Board of Directors*
- *Exercise 10-B: Analyzing Information*
- *Sample 10-C: Sample Board Development Grid*
- *Exercise 10-D: Developing an Action Plan for Board of Directors*
- *End-of-Module Checklist*

Module 11: Personnel 99

- Overview of Content
- A Special Note on Legal Matters
- Race and Ethnicity in the Workplace
- Why Recruiting and Retaining a Diverse Staff Matters
- To Set Numeric Goals—or Not
- Recruiting Staff Members of Color
- Retaining Staff Members of Color
- *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*

Module 12: Organizational Culture..... 113

- Overview of Content
- What is Organizational Culture?
- Three Core Levels of Organizational Culture
- Three Types of Organizational Culture in Relation to Diversity and Inclusiveness
- Components of an Inclusive Organizational Culture
- Creating a More Inclusive Organizational Culture
- *Exercise 12-A: Benefits of Having a More Inclusive Organizational Culture*
- *Exercise 12-B: Analyzing Information*
- *Exercise 12-C: Developing an Action Plan for Organizational Culture*
- *End-of-Module Checklist*

Module 13: Volunteers and Helpers..... 123

- Overview of Content
- Volunteering in the Nonprofit Sector
- Benefits of Having a Diverse Base of Volunteers
- Motivations and Barriers to Volunteering and Helping
- Recruiting and Retaining a Diverse Base of Volunteers and Helpers
- CHC Case Study: Module 13
- *Exercise 13-A: Benefits of Having a Diverse Base of Volunteers and Helpers*
- *Exercise 13-B: Benefits and Barriers to Volunteering and Helping*
- *Exercise 13-A: Analyzing Information*
- *Exercise 13-D: Developing an Action Plan for Volunteers and Helpers*
- *End-of-Module Checklist*

Module 14: Programs and Constituents..... 135

- Overview of Content
- Inclusive Programs and Diverse Constituents: A Matter of Quantity and Quality
- Constituents
- Race, Ethnicity, and Culture in Programs and Services
- Creating More Inclusive Programs and Diverse Constituents



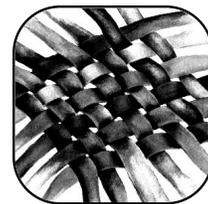
- *Exercise 14-A: Articulating Constituents and Potential Constituents*
- *Exercise 14-B: Benefits of (and Barriers to) More Inclusive Programs and Diverse Constituents*
- *Exercise 14-C: Analyzing Information*
- *Exercise 14-D: Developing an Action Plan for Programs*
- *End-of-Module Checklist*

Module 15: Marketing and Community Relations 147

- Overview of Content
- Why Marketing to Diverse Communities Matters
- Outreach to Diverse Communities
- *Exercise 15-A: Benefits of Inclusive Marketing and Community Relations Efforts*
- *Exercise 15-B: Analyzing Information*
- *Exercise 15-C: Understanding Your Audiences*
- *Exercise 15-D: Developing an Action Plan for Marketing and Community Relations*
- *End-of-Module Checklist*

Module 16: Fundraising and Membership 155

- Overview of Content
- Why Inclusive Fundraising Practices Matter
- Why Inclusive Membership Practices Matter
- Defining Benefits for Your Organization
- Communities of Color and Community Involvement
- Fundraising Strategies to Reach Communities of Color
- Membership Development Strategies to Reach Communities of Color
- CHC Case Study: Module 16
- *Exercise 16-A: Benefits of Inclusive Fundraising and Membership Development Efforts*
- *Exercise 16-B: Analyzing Information*
- *Exercise 16-C: Developing an Action Plan for Fundraising*
- *Exercise 16-D: Developing an Action Plan for Membership*
- *End-of-Module Checklist*



Module 17: Completing Your Inclusiveness Blueprint 169

- Overview of Content
- Review: What Is an Inclusiveness Blueprint?
- Roles and Responsibilities
- Writing the Inclusiveness Blueprint
- Reviewing the Inclusiveness Blueprint
- Approving the Inclusiveness Blueprint
- Writing an Executive Summary
- CHC Case Study: Module 17
- *Exercise 17-A: Assigning Roles and Responsibilities*
- *End-of-Module Checklist*

Step 6: Implementation of The Inclusiveness Blueprint

Module 18: Implementing Your Inclusiveness Blueprint..... 177

- Overview of Content
- Implementing the Blueprint
- Staying the Course
- A Commitment at Every Level of the Organization
- Evaluating Progress with the Inclusiveness Blueprint
- Ongoing Commitment to Inclusiveness
- The Evolving Role of the Inclusiveness Committee
- Celebrate Your Accomplishments!
- CHC Case Study: Module 18
- *Exercise 18-A: A Plan to Evaluate Outcomes*
- *Exercise 18-B: Accountability: Tracking Progress Toward Completing Blueprint Objectives*
- *Exercise 18-C: Staying the Course*
- *End-of-Module Checklist*

Appendices

- *Appendix A: Overview of Content*
- *Appendix B: Inside Inclusiveness: Race, Ethnicity, and Nonprofit Organizations (Executive Summary)*
- *Appendix C: Resource List*
- *Appendix D: Sample: Inclusiveness Blueprint*
- *Appendix E: Feedback Form*

INTRODUCTION



Welcome! If you are reading this, you're likely interested in helping your organization become more inclusive of people of color, and perhaps more inclusive of other diverse communities as well. The first step to becoming more inclusive is to make a commitment to learn more about inclusiveness. This workbook is designed to help nonprofit organizations of all sizes and purposes learn about inclusiveness. While The Denver Foundation values all forms of inclusiveness, the primary focus of this workbook is to help nonprofit organizations learn how to become more inclusive of people of color.

Note: The term “people of color” is used throughout this workbook to refer collectively to African Americans, American Indians and Alaska Natives, Asian Americans and Pacific Islanders, Hispanic/Latino Americans, multiracial individuals, and all other persons who are not categorized as white by the U.S. Census.

The workbook was developed by The Denver Foundation's Expanding Nonprofit Inclusiveness Initiative (ENII). The Denver Foundation created this initiative in response to broad community interest in diversity and inclusiveness. ENII's first step was to complete research that identified best practices and barriers to becoming more inclusive. ENII's second step is to provide nonprofit organizations with tools - such as this workbook - to help them become more inclusive. (Information about other tools can be found online at www.denverfoundation.org.)

Note: The full report, *Inside Inclusiveness: Race, Ethnicity and Nonprofit Organizations*, can be downloaded at www.denverfoundation.org. In addition, the executive summary of the report can be found in the Appendix.

What Will Organizations Achieve by Completing This Workbook?

If you complete and follow through on the modules in this workbook, your organization will likely achieve many or all of the following:

- A clear understanding of the benefits of inclusiveness.
- A definition of diversity and inclusiveness and a case statement clarifying your organization's commitment to inclusiveness.
- A greater understanding and awareness of the impact of racism and ethnocentrism on the people in your organization and the people you serve, as well as society at large.



- A clear understanding of facts, perspectives, and best practices in relation to inclusiveness in your community, field, and organization.
- An analysis of your organization's strengths and challenges in regard to inclusiveness.
- An inclusiveness blueprint created by and for your organization, tailored to your needs, that outlines the goals, strategies, and tactics that you will engage in to become more inclusive of communities of color.
- A plan for your organization to stay engaged in inclusiveness over the long-run.

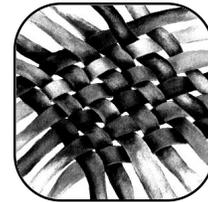
Who Should Use This Workbook?

This workbook has been created as a user-friendly and interactive guide for nonprofit executive directors, staff, and board members. However, it is not intended for all nonprofit organizations. At the conclusion of this introduction, you will find a pre-test that will help you determine whether or not the workbook is a good fit for your organization right now. **It is very important that every organization take the pre-test if it is considering using the model in the workbook.**

In addition, this workbook is primarily designed for organizations historically governed by a predominantly white Board of Directors and run by a predominantly white staff. Some people refer to such organizations as dominant culture organizations. Organizations that are predominantly governed and run by people of color may also need to address issues of inclusiveness related to race and ethnicity; however, the research that has been conducted by The Denver Foundation and other resources consulted for this workbook generally do not address issues of race and ethnicity within organizations that are rooted in communities of color. Dynamics within different communities of color and between different communities of color can have complex nuances; thus, more research and tools are needed to address race-related issues in organizations with staffs and boards that are predominantly of color.

Finally, this workbook has been created primarily for organizations that are relatively new to a more intense inclusiveness initiative that will expand inclusiveness in their organization. However, organizations that have already invested significant time and energy in becoming more inclusive and who have been successful in doing so will likely find many components of the workbook useful.

Is This Workbook Valuable for Organizations That Want to Address Race, Ethnicity, AND Other Types of Diversity?



This workbook focuses on helping organizations become more inclusive of people of color. However, the exercises have been developed in such a way that organizations that are interested in addressing issues of other diverse communities can use the workbook, too. Throughout the workbook you will find shaded boxes with tips for organizations that use a broader definition for inclusiveness.

Note: The Denver Foundation’s Initiative focuses on race and ethnicity for many reasons.

(1) The Foundation wants to understand and help others understand more about how race relations specifically impact nonprofit organizations. The Foundation, in its work in the community, has received feedback that many nonprofit organizations are very interested in inclusiveness, specifically as it relates to race and ethnicity, but need tools to help them address this issue.

(2) The Foundation believes that, in light of the demographic shifts happening in Colorado and throughout the United States, many nonprofits do not have the tools necessary to deal with these rapid changes, and that there is an urgency to work with nonprofits so that organizations can better respond to the needs of their changing community.

(3) The Foundation has limited resources and wants to focus its resources on one issue, namely race, related to inclusiveness practices to make a significant impact. The Foundation values all types of inclusiveness, and believes that, as organizations better understand how to become inclusive of people of color, those lessons will help them build inclusiveness related to other diverse populations.

The Denver Foundation values all forms of inclusiveness, as shown by the 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.

What Is Inclusiveness?

Many people use the terms “diversity” and “inclusiveness” interchangeably. In the context of this workbook, these two terms have very different meanings.



For the purposes of this workbook, **diversity** describes the extent to which an organization has people from diverse backgrounds and communities working as board members, staff, and/or volunteers.

As defined for the purposes of this workbook, **inclusive** organizations not only have diverse individuals involved; more importantly, they 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, diverse at all levels.

Developing inclusive organizations begins with a fundamental understanding and belief that different communities have different strengths and needs, and there are cultural nuances that impact how people think and behave. Characteristics of inclusive organizations include the following:

- Inclusive organizations are aware of different cultural nuances, and they use that awareness to plan and implement programs.
- Inclusive organizations understand that all people do not respond in the same way to messages, and they recognize that it is important to communicate in culturally appropriate and sensitive ways.
- Inclusive organizations develop internal systems to help bridge cultural gaps between people from different backgrounds, and they try to ensure that all voices are listened to and that all backgrounds are respected.
- Inclusive organizations are self-aware. This means that they intentionally solicit and listen to feedback about themselves. They realize that there are no simple answers to the challenges of living in a diverse world, but that our diverse communities provide opportunities at many levels. They understand that conflict is natural and do their best to effectively anticipate, manage, and resolve conflict.
- Inclusive organizations are most successfully built by organizational leaders who are open to change, willing to look inward, and willing to bring key stakeholders together for an open, honest dialogue. This type of dialogue begins the process of creating an inclusive organization.

Why Should Nonprofit Organizations Invest Time and Energy in Becoming More Inclusive?

Deciding to embark on an inclusiveness effort is a pivotal decision for an organization and it will require the participation of everyone in the organization. Organizations must develop a shared understanding of the

benefits of inclusiveness if they expect their key stakeholders to support an inclusiveness initiative. If you ensure that everyone understands why the work is important and where it will take them, you will be building a shared commitment that can result in deep changes for the organization.



At one time or another, most nonprofit organizations have asked themselves, “How do we become more diverse?” In fact, their first question should be, “Why do we need to become more diverse?” There are two basic reasons why creating a more inclusive organization is a worthy endeavor:

- Inclusiveness can help nonprofits be more effective and better serve their constituents and communities.
- Creating an inclusive workplace is good for business.

First and foremost, **inclusiveness can help organizations do their work more effectively and better serve their constituents and communities.** Nonprofits are in the business of making their communities healthier, stronger, and more enriching for all members. Whether they are involved in health care, the arts, civil rights, religious activities, or any other worthwhile charitable cause, nonprofits influence the quality of life for people in the communities they serve. People, by their very nature, experience many aspects of life, from health care to the arts, differently. One of the primary reasons that people experience life differently is because they have different cultural backgrounds. Therefore, when developing their programs and services, nonprofit organizations must take these cultural backgrounds and experiences into consideration in order to have a positive influence on the communities they serve.

Demographic shifts currently taking place in the United States are changing the makeup of the communities nonprofits serve. By the year 2050, it is expected that the Hispanic and Asian populations will triple, and that approximately half of the U.S. population will be people of color.¹ In general, this means that many nonprofits will need to become more knowledgeable about how communities of color experience their work. If nonprofits continue to base their plans and decisions on unexamined assumptions about their communities that may no longer be accurate, chances are high that their work will become less effective and relevant, given demographic changes.

Regardless of the mission of an organization, becoming more inclusive will help nonprofits be more successful. Here are some of the ways in which race, ethnicity, and culture can affect the work and effectiveness of nonprofit organizations.

“If we are to achieve a richer culture, rich in contrasting values, we must recognize the whole gamut of human potentialities, and so weave a less arbitrary social fabric, one in which each diverse human gift will find a fitting place.”

-Margaret Mead

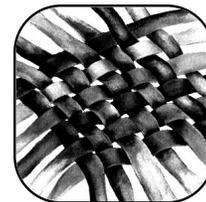


The American Association of Museums notes that “many communities are currently underrepresented in and underserved by museums. Museums that diversify their audiences, employees, and collaborators can help ensure future financial stability, broader cross-cultural understanding, the indispensable asset of community goodwill, and the increased intellectual capital gained through diverse perspectives and experiences.”²

For example, The Minneapolis Institute of Arts conducted a study that revealed that African Americans in the museum’s service area visited at a lower rate than their proportion in the population as a whole. Therefore, the museum decided to reach out to the African-American community in the Minneapolis-Saint Paul area to better understand the reasons for the differences in the rates. Through focus groups, the museum found that many African Americans felt that the museum’s collection lacked diversity and noted that exhibits which included many different cultures and emphasized connections between cultures would likely attract more African-American visitors. With the input of community members, the museum conceived of the following potential courses of action: creating more cross-cultural events, highlighting the artistic contributions of African and African-American artists in its permanent collection, and working to make the museum more reflective of and responsive to a variety of cultural traditions.³

Many educational organizations have recognized that the underlying causes of existing educational disparities are often different cultural approaches to education. Special post-secondary institutions called Tribal Colleges were created on Native American reservations to preserve culture while helping students obtain new skills and actively address the unique needs of Native American students. Between 1995 and 1996, 25,000 students were enrolled in 31 Tribal Colleges located in 12 states.⁴

In addition to providing centers of Indian research and scholarship, and employing tribal elders as instructors for certain courses, colleges respond to community needs: for example, at some colleges, the need for more American Indian elementary and secondary school teachers is addressed through providing teacher preparation programs or collaborations. Leech Lake Tribal College’s Project Grow seeks to address the high incidence of diabetes on the reservation by improving the community’s diet with traditional Indian crops.⁵ These institutions, designed to meet the needs of the Native American community, appear to be working: a survey by the American Indian Higher Education Consortium shows that 42 percent of students who earned two-year degrees at Tribal Colleges before transferring to a mainstream institution graduated, compared with only 30 percent of Native Americans who entered mainstream institutions as freshmen.⁶



There is a second compelling reason that race and ethnicity matter to the success of nonprofits. As many corporations have discovered and a great deal of research has proven, **creating an inclusive workplace is good for business**. This adage may even be truer for nonprofits than for corporations. Nonprofits generally have lower pay scales than their corporate counterparts. The staff and volunteers of nonprofits join because they receive personal satisfaction from working with nonprofits. When financial incentive is removed as a key factor in staff and board retention, then creating a healthy working environment becomes even more important. Some of the benefits of creating a more inclusive organization include:

- Higher job satisfaction, especially among staff of color.
- Lower turnover.
- Higher productivity.
- Higher employee morale.
- Improved problem-solving throughout the organization.
- Increased creativity and innovation.
- Increased organizational flexibility and ability to learn from people at all levels.
- Improving the quality of personnel through better recruitment and retention.
- Decreased vulnerability to legal challenges.^{7,8}

Other business-related reasons to become more inclusive include the potential to tap into new donor pools, improve program delivery, and reach out to new clients or audiences.

Later in the workbook (*Module 4: Making the Case for Inclusiveness*), you will have the chance to define how inclusiveness can make your particular organization more effective in accomplishing its mission. Because each organization has its own relationships with the communities it serves, you will need to define how those relationships impact your work. In doing so, you will help everyone in the organization develop a shared commitment to the organization's inclusiveness work.

What Is an Inclusiveness Initiative?

An inclusiveness initiative is a concerted, organized effort on the part of an organization to become more inclusive of people of color (and other diverse groups, if your organization has decided to have a broader focus for its current initiative). There are six overall steps within an inclusiveness initiative. They include:



- Step 1: Creating an Inclusiveness Committee (*Module 1*).
- Step 2: Engaging in inclusiveness/diversity training and hiring consultants/trainers (*Modules 2 and 3*).
- Step 3: Defining inclusiveness and diversity and creating the case for inclusiveness for your organization (*Module 4*).
- Step 4: Completing and analyzing information gathered, including available facts and stakeholder perspectives regarding your community, your field, and your organization (*Modules 5, 6, and 7*).
- Step 5: Completing an **inclusiveness blueprint** (similar to a diversity strategic plan) that spells out concrete goals, objectives, and tasks to help your organization realize the change it seeks (*Modules 8-17*).
- Step 6: Implementation of the inclusiveness blueprint (*Module 18*).

This workbook will take you through the first five steps. Once you have completed the inclusiveness blueprint, you will have everything you need for step 6 to begin enacting the steps that are outlined in the blueprint itself.

What Is Included in the Workbook?

Each module includes narrative and explanation sections, exercises to help you complete necessary activities, and an end-of-module checklist to help track progress. You will also find a narrative of a fictional organization that describes the organization's progress through an inclusiveness initiative.

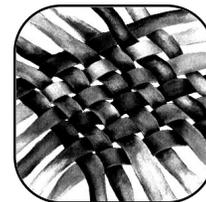
The appendix includes a list of resources, along with other materials your organization may find useful.

Is It Necessary to Complete All Eighteen Modules?

It is important that you complete all of the modules within Steps 1-4. Each of these modules will help build the foundation for a successful inclusiveness initiative.

Step 5 includes *Modules 8-17*. All organizations should complete *Modules 8 and 17*. Most organizations will only choose to work on two to four of the topics that are covered in *Modules 9-16*, so you should not feel obligated to complete all modules between 9 and 16. Future inclusiveness efforts may include additional topics, and you can come back to this workbook to complete the modules in those additional areas.

Step 6, implementation of the inclusiveness blueprint, is, of course, critical for every organization.



Does It Matter in What Order Modules Are Completed?

In general, it is recommended that you follow the outline presented in the workbook because each module builds on the work of previous modules. However, if your organization has previously completed the work that is described in any of the modules (e.g., *Module 1: Creating an Inclusiveness Committee*), then you should feel free to move on to the next module.

Note: A variety of factors influences the timing of inclusiveness/diversity training. In some cases, it may be better to do inclusiveness training before or after completing the other steps of an inclusiveness initiative. See *Module 2: Inclusiveness Training* for more information on this subject.

How Does an Organization Work Through Each Modules?

The work of each module will be completed by your organization's Inclusiveness Committee (see *Module 1* for more information on the committee), a subset of the committee, or another group your organization designates. Each module will involve reading text, attending meetings, and completing exercises. One week prior to completing a given module's exercises, distribute copies of the text to relevant parties for their individual review. (Note: though this workbook is copyrighted material, we encourage nonprofit organizations to make copies of relevant materials for internal use.)

Most organizations will then hold meetings to discuss the module's content and complete exercises; meeting length will vary, but no more than two hours at a time is recommended.

Is This Workbook Designed to Be Completed With the Help of Consultants?

This workbook can be completed with or without the help of consultants. However, if you can find the resources to hire a talented consultant, especially to help with inclusiveness/diversity training, his or her assistance will likely lead to greater success in becoming more inclusive. Yet not all nonprofit organizations have the funds to hire consultants. If your organization cannot afford to bring in outside assistance to help with the inclusiveness initiative, the workbook will still be of great value to you.

In *Module 3: Hiring Consultants*, you will receive additional information about hiring consultants.



How Much Will It Cost to Complete an Inclusiveness Initiative?

One of the factors to consider in an inclusiveness initiative is cost. The cost will depend upon your organization and how you decide to go about engaging in an initiative. When considering costs related to an inclusiveness initiative, remember that the initiative is an investment in the long-term future of your organization. Some of the cost variables include:

- Whether you work with a consultant to manage the process.
- The extent to which you utilize consultants to gather data for the information gathering process.
- The types of resources you employ to gather data during the information gathering phase.
- How in-depth your inclusiveness/diversity training is.
- Whether or not you use external evaluators to measure your progress.
- Meeting expenses.

Clearly, hiring consultants/trainers is the costliest potential expense of an inclusiveness initiative. Fees for consultants vary widely and depend in part on where your organization is located as well as the number of consultants involved, the work performed, and the contract negotiated. Fees can be project-based or figured at an hourly rate. Consulting fees vary widely. An average range for nonprofit consultants is \$75 - \$175/hour. (Consultants who work mostly with corporations or very large nonprofits may have rates as much as \$250/hour or higher.)

The following is a typical range of hours for each area of work for which a typical nonprofit organization with a staff of 50 people or fewer might expect to use the services of a consultant throughout the inclusiveness initiative:

Overall Guidance:	20-60 hours
Information Gathering:	30-60 hours
Inclusiveness Training:	20-40 hours
Evaluation:	10-20 hours

Note: These numbers are rough estimates only. The larger an organization and the more complex the issues facing an organization (e.g. legal compliance issues) the more assistance from consultants will be needed.

Costs for your inclusiveness initiative can usually be introduced gradually, as the process will take some time.

How Long Will It Take to Complete an Inclusiveness Initiative?



The process of developing an inclusiveness blueprint will vary from one organization to the next, much as the length of time that it takes to complete a strategic plan varies depending on the organization. Here are some rough guidelines to get a sense of how long each step might take your organization:

Step 1: Creating an Inclusiveness Committee (*Module 1*)

- One week to two months

Step 2: Engaging in inclusiveness/diversity training and hiring consultants/trainers (*Modules 2 and 3*)

- This process usually takes place in tandem with Step 3-6. The timeline is unpredictable; see *Module 2: Inclusiveness Training* to learn more about variables that affect the timeline for training.

Step 3: Defining inclusiveness and diversity and creating the case for inclusiveness for your organization (*Module 4*)

- Two weeks to two months

Step 4: Completing and analyzing information gathering of available facts and stakeholder perspectives regarding your community, your field, and your organization (*Modules 5, 6, and 7*)

- One month to one year

Step 5: Completing an inclusiveness blueprint that is similar to a diversity strategic plan that spells out concrete goals, objectives, tasks, etc., to help your organization realize the change it seeks (*Modules 8-17*)

- One month to four months

Step 6: Implementation of the inclusiveness blueprint (*Module 18*)

- Ongoing

In general, it is best not to rush the process of an inclusiveness initiative. It takes time to do this work well and, not surprisingly, success will depend in part on how inclusive the process itself is. Moreover, people will need to have the time and space to talk about their experiences because this work can be personally challenging. On the other hand, it is better not to take such a long time that you lose momentum. People can



get frustrated if they feel that nothing concrete has materialized as a result of their work, which can result in dissatisfaction with the inclusiveness initiative. Thus, you will want to strike a balance between moving the process forward and showing accomplishments along the way, and taking enough time that people have input into the process.

How Long Should the Inclusiveness Blueprint Last an Organization?

The inclusiveness blueprint will likely cover a two to four year span. That is to say, the time that it takes for an organization to begin implementation of the blueprint until the time that the desired outcomes are achieved should be between two and four years. However, this time period can vary significantly depending on the organization. Some organizations may decide to use the same basic framework for the blueprint for five or more years but actively work to update it every 12 months. Others may decide that it will only take 18 months to complete the initial outcomes and then start from scratch at the end of 18 months with a new blueprint. Each organization must decide for itself the duration that will best suit its needs.

Will Organizations Be Finished After Completing *Module 18*?

Yes and no. You will have completed the formal elements of the workbook and you will have a lot to show for your work. Moreover, you will be well on your way to becoming more inclusive as an organization. On the other hand, inclusiveness work is never absolutely complete in the same way that a nonprofit's mission is (almost) never completely achieved. Rather, as your organization becomes more inclusive, you will likely find that an awareness of inclusiveness will be integrated into all of your work. Inclusiveness is a continual process rather than a fixed destination. Your organization will likely continue to re-assess its programs and policies to determine how well you're meeting the ever-changing needs of the community.

Over time, most organizations will develop mechanisms to ensure that inclusiveness is institutionalized at every level. For example, it may become so integrated into the strategic planning process, the performance review process, the board recruitment process, and so on, that it is no longer necessary to maintain a special inclusiveness initiative. You will always want to take steps to ensure that your programs and organizational culture are inclusive and that newcomers to your organization share an understanding of inclusiveness. This, too, will evolve to simply be a part of the way your organization does business.

What's the First Step?

Now that you have a clear understanding of what is involved in an inclusiveness initiative, it is time to take the pre-test - *Is This Workbook Right for Your Organization?* - to determine whether or not your organization is ready to embark on the type of inclusiveness initiative described in this workbook. If you are not quite ready to engage in a full inclusiveness initiative at this time, the pre-test will provide you with suggestions of other steps you can take. If you are ready now, then good luck, and enjoy the journey!



¹“Census Bureau Projects Tripling of Hispanic and Asian Populations in 50 Years; Non-Hispanic Whites May Drop To Half of Total Population,” US Census Bureau, www.census.gov.

²“Information Center Fact Sheets: Diversity Efforts of Museum Service Organizations and Developing a Diversity Plan,” American Association of Museums, www.aam.org.

³“A New Audience for a New Century,” The Minneapolis Institute of the Arts, www.artsmia.org.

⁴*What Makes Tribal Colleges Unique?* American Indian Higher Education Coalition, October, 1998, www.aihec.org.

⁵Ibid.

⁶Ibid.

⁷Sources: Cox, Taylor, *Developing Competency to Manage Diversity*, San Francisco, CA: Berrett-Koehler Publishers, Inc, 1997.

⁸Society for Human Resource Managers, www.SHRM.org.

IS THIS WORKBOOK RIGHT FOR YOUR ORGANIZATION? A PRE-TEST



Welcome! By choosing this workbook, you and your organization have demonstrated an interest in becoming more inclusive of communities of color and perhaps other diverse communities. This is important work for the nonprofit sector — and all organizations that wish to focus on becoming more inclusive should be congratulated.

Becoming more inclusive requires a commitment to an in-depth, extended process, and this workbook is best suited for those organizations able to make that commitment.

The following short pre-test will help you determine whether this process is appropriate for your organization at this time. Remember, there are no right or wrong answers — the purpose of this assessment is to help you determine whether the workbook is a good fit for your organization. If it is not, you can take other steps to work on inclusiveness, some of which are explained at the end of this assessment. You will tally your answers after completing question six.

This pre-test has been designed to be taken by an organization's CEO/executive director, board chair, or other senior-level staff or board leadership. Most questions will rely on your impressions and opinions, which may or may not be the same as those of other members of your organization. It may be helpful for individuals within an organization to have a discussion about the answers after taking the pre-test, prior to embarking on the workbook process.

- 1. Which of the following choices best summarizes your organization's focus regarding inclusiveness/diversity? (select one)**
 - a. We are primarily interested in having more staff and/or board members of color.
 - b. We are interested in incorporating inclusiveness into all that we do — changing the way our organization meets its mission, our culture, and environment related to race and ethnicity, and how we recruit and retain people of color as board, staff, volunteers, and clients.
 - c. We are primarily interested in improving our services/reaching out to clients of color.

- 2. Based on your knowledge, which of the following statements would best characterize your CEO or executive director's approach to inclusiveness? (select one)**
 - a. Our CEO/ED believes that inclusiveness matters, but that we have other priorities to focus on right now (fundraising, strategic plan, capital campaign, etc.).



- b. Our CEO/ED would go along with an inclusiveness initiative if the board of directors or a major funder strongly recommended it.
 - c. Our CEO/ED believes that our organization should not take race or ethnicity into account in any area of our work.
 - d. Our CEO/ED believes that being inclusive is simply the right thing to do.
 - e. Our CEO/ED believes that inclusiveness will help our organization to raise more money.
 - f. Our CEO/ED believes that inclusiveness will help us to better meet our mission, such as in the following ways: raising more funds, improving services and programs, and better meeting the needs of our community.
 - g. Our CEO/ED believes that our organization should become more diverse to respond to community pressure or expectations.
3. **Based on your knowledge, which of the following statements would best characterize the approach of your board of directors to inclusiveness? (select one)**
- a. Our board thinks that inclusiveness is generally a good thing.
 - b. Many members of our board of directors strongly believe being more inclusive would help us to better meet our mission, and they raise issues related to race and ethnicity often (i.e., when discussing program policies, suggesting training for the board, etc.).
 - c. Most members of our board of directors prefer that we not take race or ethnicity into account in any area of our work.
 - d. Our board of directors does not seem to have strong positive or negative feelings about inclusiveness.
4. **Current organization focus/priorities: (check all that apply)**
- Our organization is in the midst of (or about to embark on) a major capital campaign.
 - Our organization is in the process of a leadership transition at the CEO/ED level.
 - Our organization is currently addressing a crisis (i.e., loss of a major funder, major influx of clients, federal or state funding cuts, etc.)
 - Our organization is in the midst of a major reorganization.
5. **The level of resources that you believe your organization can commit to an inclusiveness initiative: (select one)**
- a. We have (or can access through funders) funds available (\$3,000 or more), and are able to make inclusiveness a priority for our staff and board's time and energy right now.
 - b. We are able to make inclusiveness a priority for our staff and board's time, but we do not have funds available.



- c. We have funds available (\$3,000 or more), but our staff and board have other priorities right now.
6. **The kind of work your organization would be willing to engage in for an inclusiveness initiative: (select one)**
- a. We would like to undergo diversity/inclusiveness training about culture, diversity, race relations, and/or racism.
 - b. We would like to complete an organizational assessment that provides information about our work in relation to race and ethnicity and that provides information that we will use to create an inclusiveness blueprint (i.e., a diversity strategic plan).
 - c. We would like to undergo diversity/inclusiveness training about culture, diversity, race relations, and/or racism and we would like to complete an organizational assessment that provides information about our work in relation to race and ethnicity and that provides information that we will use to create an inclusiveness blueprint (i.e., a diversity strategic plan).

Answer Key

Convert your answers to numbers.

- 1. a = 3, b = 6, c = 4
- 2. a = 1, b = 2, c = 0, d = 3, e = 2, f = 4, g = 2
- 3. a = 3, b = 4, c = 0, d = 2
- 4. Subtract four points from the total score for each line checked.
- 5. a = 3, b = 2, c = 1
- 6. a = 1, b = 3, c = 5

Record your total here: _____

Total 14 – 21: Good fit

- The workbook is likely a good fit for your organization.
- Read on to see the six key areas detailed below to determine whether your organization has all of these characteristics in place.
- If so, continue on through this workbook.

Total 8 – 13: Moderate fit

- This workbook is based on a more intensive process; the entire process may not be a good fit for your organization at this time.
- Your organization may wish to start more gradually by focusing on specific pieces of this workbook, such as *Module 4: Creating the Case for Inclusiveness*.



- Your organization may wish to take six months to a year to plan for the process detailed here, and then re-take this quick pre-test. After planning and conducting preliminary steps, this workbook may be right for you.
- Read on to see the six key areas and determine which area(s) are strengths for your organization and which areas need work.

Total 0 – 7: Not a good fit at this time

- This workbook is likely not a good fit for your organization's current interests and resources.
- Read on to see the six key areas, each of which includes several options for inclusiveness work for organizations whose needs don't match the resources available in this workbook.

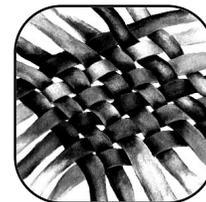
Characteristics That Will Affect Your Organization's Ability to Go Through the Workbook Process: Six Key Areas

Regardless of your organization's total on the quick quiz above, you will find it helpful to take these areas into account when deciding whether the workbook is a good fit for your organization.

1. Focus on Inclusiveness Versus Diversity

- This workbook is designed for organizations that are interested in becoming more inclusive in a comprehensive way that will affect all areas of their organization, from programs to governance.
- This workbook is not well suited for organizations primarily focused only on increasing the representation of individuals of color at board or staff levels. These organizations will likely find, though, that changing organizational culture, recruitment and retention practices, and other policies and procedures in a deeper way will have an important effect on the organization's ability to recruit and retain individuals of color into all levels, including staff, volunteers, clients, and Board members.

If your organization is primarily interested in diversity (i.e., increasing representation at different levels of your organization), we recommend that you engage in discussions internally about the reasons behind your organization's desire to increase representation of individuals of color, the factors that influence your ability to do so, and the benefits of inclusiveness. You may also wish to consult respected colleagues within your field who are working toward deeper inclusiveness, or who have successful inclusiveness practices, about their work.



2. Strong CEO/ED Commitment

Research has shown that the level of commitment to inclusiveness from the CEO/ED, whether white or a person of color, is a key factor in becoming more inclusive.

- We recommend that organizations that do not currently have a strong, deep commitment from their leadership not go through this workbook at this time, even if all other factors are present.
- If your organization does not have a strong commitment from your CEO/ED, you may wish to have board members or other staff talk with your CEO about why you feel inclusiveness is important.
- Furthermore, you may recommend that your CEO/ED talk with colleagues in your field who have strong inclusiveness practices about their work, including the benefits and challenges of an inclusiveness initiative.
- You may also wish to work through *Module 3: Creating the Case for Inclusiveness* as an exercise to clarify the benefits of inclusiveness for your organization.
- However, we recommend that you do not go through the full workbook process until your organization has a strong commitment from the CEO/ED in place, including the desire to lead an inclusiveness initiative for your organization.

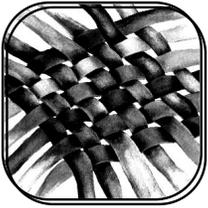
3. Board Commitment

Commitment from your board of directors will help institutionalize inclusiveness at your organization because the board is responsible for making policies, governance, and hiring the CEO/ED.

- If your organization has weak or moderate support for an inclusiveness initiative at the board level, but has all of the other key items in place, you may wish to go through this workbook process.

Some organizations may find that their board members do not fully understand the benefits of inclusiveness for the organization.

- If this is the case, completing *Module 3: Creating the Case for Inclusiveness*, and then presenting your findings to your board, could be a way of helping your board become more supportive of your initiative.
- Furthermore, you may wish to engage an inclusiveness trainer or consultant to help your board understand the ways that race and ethnicity affect your organization's work.



4. *Environment*

Competing Initiatives

- If your organization is currently involved in an initiative that requires a great deal of time and energy, such as a capital campaign, now is likely not the best time to take on inclusiveness work, as it will only compete with your other priorities.
- It's best to wait until your organization has completed other potentially competing initiatives and then begin the process detailed in this workbook.

Addressing a Crisis

- If your organization is currently facing a crisis, such as a drastic cut in funding, it's best to focus your energy on stabilizing your organization prior to beginning this workbook.

Leadership Change or Reorganization

- If your organization is in the midst of a leadership change or reorganization, it's best to wait until that change is complete, as the leadership of the CEO/ED is vital to a successful inclusiveness initiative.

5. *Willingness to Commit Resources*

The process described in this workbook will take resources — time, energy, and funds. For your work to be successful, it is important that your organization have adequate resources in place. This workbook is designed for organizations that are able to commit time and resources for an extended period — from six to eighteen months. Organizations should be prepared to make the inclusiveness work a priority.

If your organization is ready to do this, but does not have funds available, you may wish to spend a year planning for the initiative by going through the first modules in this workbook (such as *Modules 1* and *3*) and setting funds aside in your budget (or request financial support from individuals or institutions) for next year.

Organizations that have funds available for work but do not have time should set aside those funds until they can commit staff and/or volunteer time and energy. The funds you'll need will depend on your organization's size, access to volunteer resources, and ability to devote staff time and energy (see the *Introduction*, page XX for more information about budgeting).

6. Willingness to Participate in Both Organizational Development and Inclusiveness Training



This workbook is designed for organizations that are interested in both training about race and ethnicity and evaluating and addressing any existing weaknesses in their organization's programs, practices, and policies. Both areas are intertwined and dependent upon one another for the eventual success of your inclusiveness initiative. The relationship between these two areas is further explained in *Module 2: Inclusiveness Training*.

If your organization is focused solely on inclusiveness training, this workbook is probably not right for you.

- Such organizations may decide to engage the services of an inclusiveness trainer.
- Then, after completing training, these organizations often consider how to institutionalize the benefits of that training in all areas of your organization, at which point you may want to return to the workbook.

If your organization is focused solely on changing policies and programs related to inclusiveness, this workbook is not quite right for you, as it relies on the connection between the individual work done through training about culture, race, and ethnicity and inclusiveness policies and practices in the workplace.

- However, the degree to which your organization engages in each of these areas is up to you: some organizations may choose to do a multi-day inclusiveness training retreat and gradually work on organizational development, while others may choose to spread out small chunks of training over the course of a year and work intensely on organizational development.
- For more information on training, please see *Module 2: Inclusiveness Training*.

Note that the above characteristics will likely fluctuate over time.

- For example, your board might be mildly interested in inclusiveness at the start of your initiative, and fully committed by the time that you are through.
- Or, your organization might have a great deal of staff time to commit to the initiative over the summer during a programming lull, but less staff time to commit during the winter. Such changes are to be expected.
- The most important thing is that your organization and its leadership make a continued commitment to addressing inclusiveness in your organization.



Additional Helpful Qualities

In addition to meeting the characteristics of the above six areas, the following qualities will likely be helpful to your organization as you go through the workbook. Unlike the above six areas (especially numbers one and two), these qualities are not strictly necessary for an inclusiveness initiative following the model detailed in this workbook:

- Open to feedback about the organization's work.
- Expectation that this work will include difficulty and discomfort.
- Strong internal and external communication systems, both formal and informal.
- Organization's ability to change.
- Conflict-resolution skills within the organization.
- An internal culture of respect.
- A belief in the value of differences.
- A belief that race and culture matter in the delivery of services.
- Ability to set and reach goals and objectives.
- Ability to track, measure, and evaluate progress.

If your organization does not currently have one or more of the above qualities (e.g., you may believe that your organization can improve its conflict-resolution skills), you can choose to address that as a part of your initiative (e.g., by looking at how race and culture affect conflict during inclusiveness training sessions).

Summary

Inclusiveness work is a marathon, not a sprint: it will take time, patience, and endurance. Through the course of this workbook, your organization will likely experience highs and lows, and it will need internal strength and external support. But, at the completion of the workbook, you will have a **concrete blueprint for how to make your organization more inclusive and will be well on your way to implementing this plan.**

Your plan should improve your ability to do some or all of the following: serve current and prospective clients, recruit and retain staff and board members, meet the needs of your community, solve problems creatively and effectively, and fulfill your mission. **In short, committed organizations ready for the workbook process will probably find it well worth their while.**