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# Getting on Board

## Promising Practices for Advancing Equity, Diversity, and Inclusion in the Governance of Community-Based Organizations

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## Promising Practices for Advancing Equity, Diversity, and Inclusion in the Governance of Community-Based Organizations

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I also want to thank the experts, researchers, organizers, coaches, and consultants who helped me to understand what it takes to drive organizational culture change and foster inclusive spaces. This paper is a product of your collective wisdom, and I hope that it may serve to help you further advance this work.

Finally, I want to thank my mentors and advisors at the Joint Center for Housing Studies and NeighborWorks America for your invaluable guidance and expertise. In particular, I'd like to thank Jen Christian at NeighborWorks America and David Luberoff at the Joint Center for your considerable support in making this project a reality.

## Executive Summary & Overview

*“Culture eats strategy for breakfast.”*

An NWO Executive Director<sup>1</sup>

Across the NeighborWorks America network, many housing organizations found that the year 2020 brought into sharp relief a number of technical and adaptive challenges facing their institutions. In particular, the national spotlight on systemic racism highlighted for many an urgent need to reexamine and improve their nonprofit governance structures in order to better promote diversity, equity, and inclusion at all levels of the organization. This project arose in response to this heightened sense of urgency and seeks to provide compass bearings for nonprofit boards looking to advance practices of race, equity, diversity, and inclusion (REDI) in their governance.

I begin by reviewing existing tools and frameworks for advancing organizational culture change. I then synthesize my findings from more than forty interviews conducted with practitioners and policymakers working to advance REDI across the NeighborWorks America network. To identify actionable lessons, I organize these findings into five broad principles (No Single Size Fits All; Root in Data and Story; Focus on People; Form Determines Function; Iterate, Iterate, Iterate). I then illustrate each principle with descriptive case studies drawn from my interviews with NeighborWorks Organizations.

These findings are shared in the hopes that they may inform the reader’s approach to advancing REDI within their own community. Because the work of REDI is necessary personal and rooted in a given community, the findings and recommendations contained herein emphasize the need to center one’s community and organizational culture in one’s strategizing. Doing so—or failing to do so—often means the difference between success and failure.

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<sup>1</sup> Interview by the author, remote, July 27, 2020. This interviewee attributed this quote to the late management consultant and writer Peter Drucker, though many believe this attribution to be incorrect (Quote Investigator, “Culture Eats Strategy for Breakfast,” May 23, 2017, <https://quoteinvestigator.com/2017/05/23/culture-eats/>). Regardless of its origin, the sentiment remains an important reminder that the strategies taken by organizational boards and leadership must themselves account for the institution’s cultural and community contexts.

## Introduction

### Project Scope & Aim

This project arose in response to a heightened sense of urgency around topics of equity, diversity, and inclusion throughout the NeighborWorks network. It reflects research conducted throughout the summer and fall of 2020 as part of the Edward M. Gramlich Fellowship in Community and Economic Development, a partnership between the Joint Center for Housing Studies at Harvard University and NeighborWorks America. This project is intended to complement and support NeighborWorks America’s ongoing efforts to advance promising practices of race, equity, diversity, and inclusion (REDI) and nonprofit board governance. This document seeks to provide compass bearings for boards as they look to advance REDI in their organizations, recognizing that each entity will need to self-assess and develop a strategy that is right for their community.

Across the NeighborWorks America network, many housing organizations found that the year 2020 brought into sharp relief a number of technical and adaptive challenges facing their institutions. In addition to the numerous operational challenges brought about by the COVID-19 pandemic, the national spotlight on systemic racism highlighted for many an urgent need to improve their governance structures to better address gaps in informational flow and decision-making power between those in charge of their organization and members of the communities whom they serve.

NeighborWorks America’s Excellence in Governance program (EIG) exists to help network organizations’ board members create “lasting, adaptive change” in their organization by giving cohort members space to discuss, learn, and explore different modes of thinking and practice around organizational leadership and governance.<sup>2</sup> Participating organizations send a small cohort of board members to EIG meetings, where they work with NeighborWorks coaches and other network organization boards to identify growth edges and make improvements in their board governance structures and processes. This includes work on fostering “intentional and meaningful equity, diversity, and inclusion on the board,” an area in which both NWA and its member organizations have reported increasing interest over the past few years.<sup>3</sup> Interest in this work particularly increased in the year 2020.

The primary focus of this report is to share observations, insights, and recommendations gleaned from my research and interviews in order to advance REDI in the governance and leadership structures of community-based nonprofit organizations, such as those in the NeighborWorks America network. My aim is to provide generalizable lessons that the reader may then apply to their own context, punctuated throughout with specific examples and anecdotes provided by interviewees. While I will take care to mask the identity of individual organizations to respect the candor and honesty with which they spoke to me, my hope is to provide the reader with a thought-provoking resource that goes beyond a simple list of pithy statements to provide actionable ideas to advance REDI in the governance of their organization.

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<sup>2</sup> “Board Leadership,” NeighborWorks America, accessed May 2, 2021, <https://www.neighborworks.org/Training-Services/Nonprofit-Leadership/Board-Leadership>.

<sup>3</sup> “Excellence in Governance Overview,” NeighborWorks America, accessed May 2, 2021, <https://www.neighborworks.org/Training-Services/Nonprofit-Leadership/Board-Leadership/Overview>.

## Methodology

The findings in this document are grounded in a review of the literature on organizational culture change and represent the product of more than forty interviews conducted during the summer of 2020.

The literature provided a preliminary framework for driving organizational culture change and integrating REDI practices into nonprofit governance. A brief discussion of some tools and frameworks from this literature is provided in the next section. I also reviewed both NWA leaders' public statements about REDI and internal documents pertaining to its practices. These ideas provided a foundation for my interviews, and they are reflected throughout the discussion of my findings in subsequent pages.

Seventeen interviews were conducted with board chairs, board members, and executive directors from ten different NeighborWorks Network Organizations (NWOs) scattered across the four national regions in which NeighborWorks America (NWA) operates. Specifically, eight executive directors, six board chairs, and three other board members were interviewed for this project; four NWOs were represented by one interviewee, while the remaining six NWOs offered two or more interviewees. Interviewees were largely identified through referrals and mutual introductions, and as such I make no quantitative claims about the NWA network that would require a representative sample. The majority of interviewed NWOs were former or current participants in NWA's Excellence in Governance (EIG) program, a governance development program for board members of NWOs, though not all interviewees had taken part in the program.

An additional twenty-four interviews were conducted with academics, coaches, and consultants who specialize in implementing race, equity, diversity, and inclusion (REDI) work in the leadership and governance of nonprofit organizations. Again, these interviewees were identified largely through referrals and mutual introductions. All had previously worked with NWOs or NWA in some capacity.

Interviews typically lasted one hour and were largely organic in nature. All NWO interviewees were asked to speak about their organization's history and the area they serve, challenges and barriers to advancing REDI in their governance, successes and surprises they encountered in examining their REDI practices, and any lessons or advice they had for other community-based organizations doing similar work. Experts from outside the NWA network were asked to share similar examples from their own experiences, as well as to provide feedback and frameworks of understanding for synthesizing my findings. Beyond these initial questions, conversations focused primarily on further explanation and follow-up, with the goal of gleaning nuanced insights and lessons learned from institutional practices.

Interviewees were given anonymity so they could feel free to speak candidly about their challenges, successes, and lessons learned. Examples and anecdotes in the following pages will therefore have identifying information masked, though details are provided in order to give the reader a sense of context in determining the applicability of examples to their own organization.

All interviews were conducted with an eye towards the NeighborWorks America Community Agreements, which guide discussions of potentially sensitive matters within the network and the EIG program. These Community Agreements are reproduced here in the hopes that the reader may find them useful in their own work to advance REDI within their organization.

### NeighborWorks America Community Agreements

- Stay engaged
- Speak your truth responsibly
- Listen to understand
- Be willing to do things differently and experience discomfort
- Expect and accept non-closure
- Confidentiality

*Source: NeighborWorks New Employee Resource Guide, April 2020.*

While many of these conversations touched on the role that NeighborWorks America plays in advancing REDI across the broader network, in the interest of serving a broader audience this paper focuses on the principles and strategies which community-based nonprofits can use to advance REDI within their internal leadership and governance structures.

### Definitions & Assumptions

The work of equity, diversity, and inclusion is vast, evolving, and necessarily personal. It therefore is difficult to generalize about the subject, as the specific interpersonal context of any given example will necessarily play a role in determining its outcomes. Because this paper is specifically focused on advancing REDI within institutional governance—and thus deals heavily in matters of organizational culture—this caveat holds especially true. For this reason, ideas and recommendations surfaced by this paper should be interpreted as a broad foundation for future work, meant to provide the reader with compass bearings for consideration within their organization’s context rather than a list of hard and fast rules for advancing REDI.

Here, it is worth pausing to define what we mean by REDI, as well as each of the ideas contained within that acronym: Race, Equity, Diversity, and Inclusion. At NeighborWorks America, REDI is a decisional framework, meant to give people tools to reflect and advance organizational change.<sup>4</sup> It is intended to go beyond an initiative to increase diversity and to instead focus on “building a culture of inclusiveness,” as NWA Executive Vice President Rutledge Simmons put it.<sup>5</sup> The framework prioritizes using a structural approach to generate cultural change over time. As NWA REDI Director Don Trahan, Jr., put it: “Social change means that you carry it into your daily life, how you operate. Over time, you have a more informed lens to view things.”<sup>6</sup> These

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<sup>4</sup> Interviews with Don Trahan, Jr., remote, June 17 and August 10, 2020.

<sup>5</sup> Madelyn Lazorchak, “Building a Culture of Diversity and Inclusion,” January 20, 2020, NeighborWorks America, <https://www.neighborworks.org/Media-Center/Blog/Home/2020/January-2020/Building-a-culture-of-diversity-and-inclusion?fbclid=IwAR3Gf8kJUQn1qpZ2TS3zhVUyezYyE9wxzaju5FVx4mwHLw7kmS84XkPgw>.

<sup>6</sup> Ibid.



public sentiments reflect the commitments and action plans put forth in a host of internal NWA documents pertaining to REDI.

Much has been written on the benefits of diversity for the leadership of an organization. Diverse groups have been shown to make better decisions, exhibit more resiliency to unexpected shocks, be more agile in adapting to new situations, and drive higher performance in an organization.<sup>7</sup> Diversity is also relatively easy to measure, once an organization has defined its target metrics for doing so. However, as several interviewees corroborated from their own experiences, this ease of measurement can lead to problems. The relative ease of measuring diversity can lead to overreliance on these metrics, to the detriment of equity and inclusion efforts. Additionally, any identity markers (race, gender, age, ability, etc.) which are left out of an organization's diversity metrics become easy to overlook, which can lead to stagnation in those areas and limit the organization's diversity over time.

Inclusion, or the feeling that one's voice is welcomed and valued within an organization, is significantly harder for organizations to measure. Like any feeling, it is interpersonal, dynamic, and abstract. As such, interviewees frequently reported feeling that it was much more daunting to address than organizational diversity. Interviewees also reported feeling that it was easier to misunderstand, with one noting "People often think they're [doing inclusion work] when they're focusing just on diversity."<sup>8</sup> For this reason, this project pays special attention to efforts to foster inclusion, although it necessarily engages with topics of diversity and equity.

Whereas *equality* is concerned with making sure resources are divided so that everyone has the same amounts, *equity* is concerned with making sure that resources are divided so that everyone has what they need to achieve similar outcomes. Several interviewees used the phrase "Equity is in our DNA" when speaking to me about their nonprofit organization.<sup>9,10,11</sup> Certainly, as nonprofit organizations founded to support and serve communities in need of housing affordability and stability, most NWOs do have equity in their organizational genetics—though, as will be discussed later in this paper, most interviewed for this project recognized that advancing equity was an ongoing process and not one they could complacently regard as achieved. At the national level, NeighborWorks America similarly traces its roots to local housing equity efforts led by Pittsburgh organizer Dorothy Mae Richardson, and as it has grown, its practice of equity has continued to evolve.<sup>12</sup>

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<sup>7</sup> David Rock and Heidi Grant, "Why Diverse Teams Are Smarter," *Harvard Business Review*, November 4, 2016. <https://hbr.org/2016/11/why-diverse-teams-are-smarter>; Stephanie Duchek, Sebastian Raetzke, and Ianina Scheuch, "The Role of Diversity in Organizational Resilience: A Theoretical Framework," *Business Research* 13 (January 2020): 387-423; Elizabeth Mannix and Margaret A. Neale, "What Differences Make a Difference? The Promise and Reality of Diverse Teams in Organizations," *Psychological Science in the Public Interest* 6, no. 2 (October 2005): 31-55; David A. Thomas, "Diversity as Strategy," *Harvard Business Review* 82, no. 9 (September 2004): 98-108.

<sup>8</sup> Interview by the author, remote, July 20, 2020.

<sup>9</sup> Interview by the author, remote, July 14, 2020.

<sup>10</sup> Interview by the author, remote, July 24, 2020.

<sup>11</sup> Interview by the author, remote, August 6, 2020.

<sup>12</sup> Madelyn Lazorchak, "Profiles in Leadership: Breaking Down Barriers and Leading by Example," February 2, 2021, NeighborWorks America, <https://www.neighborworks.org/blog/profiles-in-leadership-breaking-down-barriers-leading-by-example>.

Finally, it's worth addressing this paper's focus on nonprofit board governance. There is a tendency in the nonprofit sector to talk about governance and boards as separate and distinct from operations and staff. Of course, in practice, most institutional changes require the buy-in and support of both staff and board members to be successful. Indeed, as one interviewee put it, "[REDI work] can't be 'boards and staff.' It has to be 'boards with staff, staff with boards.'"<sup>13</sup> For the purposes of limiting this paper's scope, its discussion focuses primarily on boards and board governance, but staff will be included in several examples and should be considered in any future work referencing this paper.

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<sup>13</sup> Interview by the author, remote, July 28, 2020.

## Literature Review: Tools for Advancing REDI in Organizational Leadership

A review of the literature on management practice and organizational theory revealed a number of tools for advancing REDI in organizational leadership and decision-making structures, including board governance. Several interviewees directly referenced and recommended these tools as helpful guides for their REDI practice, though different individuals found different frameworks to be better suited for their individual contexts. Other interviewees were unfamiliar with these more theoretical formulations, but their discussion of their approach to REDI revealed significant overlap with these frameworks. As such, they are summarized here to inform this project's findings.

### NeighborWorks America's Equity Filter

The NeighborWorks Equity Filter, developed by NWA REDI Director Don Trahan, Jr., consists of three main questions, which are meant to provoke reflection and discussion of proposed actions through a REDI lens.

1. How does the proposed action impact (address all that apply):
  - Racial dynamics
  - Equity
  - Diversity
  - Inclusion
  
2. How does the proposed action support (address all that apply):
  - Workplace equity
  - Workforce equity
  - Community engagement (NWOs)
  - Rural access to opportunity
  - Reducing persistent poverty
  - Addressing rapid demographic changes
  - Comprehensive community development
  - Capacity building
  
3. What strategies are being used and how will they help achieve equity at NeighborWorks America? Please assess the resources, timelines, and accountable factors that will help ensure the success of this action(s).

*Source: NeighborWorks Equity Filter, April 2020.*

## Williams's AIIR

Dr. Damon A. Williams, Chief Catalyst at the Center for Strategic Diversity Leadership and Social Innovation, writes in his book *Strategic Diversity Leadership* that diversity and inclusion plans “can’t breathe without AIIR.” He identifies these four components as essential for driving long-term organizational change with regards to REDI.

- **Accountability**  
Any major initiatives or programs undertaken by an institution must clearly define their goals, which themselves must be tied to strategies for implementation, metrics for success, and detailed understandings of impact.
- **Infrastructure**  
Any major initiatives or programs undertaken by an institution must clearly identify leadership and decision-making structures, including the definition of a clear mandate, reporting structure, and resource pool.
- **Incentives**  
Any major initiatives or programs undertaken by an institution must create incentives to “pull” in tandem with the “push” of accountability measures. The most effective incentives celebrate and reward successful progress.
- **Resources**  
Any major initiatives or programs undertaken by an institution require dedicated resources to succeed. These include—but are not limited to—capital, talent, and time.

*Source: D.A. Williams, Strategic Diversity Leadership: Activating Change and Transformation in Higher Education (Stylus Publishing, 2013).*

## Kotter's Eight Steps to Transforming Your Organization

Harvard Business School professor John Kotter identifies the following eight steps for leading organizational change in his book, *Leading Change*.

1. Establish a Sense of Urgency
2. Form a Powerful Guiding Coalition
3. Create a Vision
4. Communicate the Vision
5. Empower Others to Act on the Vision
6. Plan for and Create Short-Term Wins
7. Consolidate Improvements and Produce Still More Change
8. Institutionalize New Approaches

*Source: J.P. Kotter, Leading Change (Harvard Business Review Press, 1996).*

## Carroll's Three Lenses to Analyze Organizations

Professor John S. Carroll at the MIT Sloan School of Management articulates three analytical lenses with which to view organizations. They each take into account different assumptions and are intended to highlight different facets of an organizational action or model. Readers are instructed to use all three as a means to consider all sides of a proposed action.

1. The Strategic Design Lens

This lens assumes that organizations are machines designed to achieve goals by carrying out tasks, and that such tasks are selected as part of a rational, analytical strategy to achieve those goals. It also assumes that, with the right information and strategic plan, an organization can rationally optimize to achieve its goals.

2. The Political Lens

This lens assumes that organizations are composed of individual stakeholders who may have differing goals and interests. The organization acts in accordance with the balance of power between coalitions of these stakeholders, and thus decides actions and strategies based upon continuously evolving struggles and negotiations between these groups.

3. The Cultural Lens

This lens assumes that organizations are comprised of people who assign meanings to situations and take action accordingly. These meanings are not given, and are instead constructed by individuals, the organization, and society writ large. It assumes that actions and behaviors are determined primarily by the stories, symbols, and frames assigned to different pieces of information and shared among a group of people.

*Source: J.S. Carroll, Introduction to Organizational Analysis: The Three Lenses (MIT Sloan School, 2006).*

## Findings: Five Principles for Advancing REDI in Board Governance

Across my interviews with staff and boards at NeighborWorks Network Organizations (NWOs), a number of major ideas, practices, and themes repeated themselves. In particular, the following five principles emerged from these conversations:

- No Single Size Fits All
- Root in Data and Story
- Focus on People
- Form Determines Function
- Iterate, Iterate, Iterate

This list of principles should not be taken as an exhaustive or prescriptive list, but rather as a starting point for discussion among board members and leadership at neighborhood-based and community-based organizations—such as those in the NeighborWorks network—who are engaged in critical examination of their own race, equity, diversity, and inclusion (REDI) practices. While these themes are necessarily abstracted for purposes of generalizability, I illustrate them with a number of examples and anecdotes shared by interviewees from their own experiences. As stated previously, organizations should take care when implementing these principles to self-assess and develop strategies that make sense for their context and community.

### No Single Size Fits All

*“We don’t want to lead with what we want to do.  
We want to know what the community wants us to do.”*

**An NWO Board Chair<sup>14</sup>**

Every community—and therefore, every organization and its board—is different. Each organization will have different needs, and those needs will change over time as organizations continue to change. Since 1) equity is rooted in the needs of a community, 2) representative diversity will look different in different communities, and 3) the work of inclusion must necessarily be reflective of the people being included, it is therefore necessary that organizations and their boards take care to root their approach to REDI in the context of their own community. This includes carefully considering any unique opportunities or resources that may be present.

*Don’t assume what people need.*

In conducting this assessment of their community and their organization, boards must take care to not make assumptions about their community or its needs, but rather to root their plans in quantitative and qualitative information collected from members of the communities being served. While boards must lead the way in advancing REDI in their organizations, directives from the top must be rooted in listening to the community.

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<sup>14</sup> Interview by the author, remote, August 6, 2020.

*Listening requires the willingness to change.*

That act of listening requires a willingness to change course in response to what is said. It is relatively easy to set up town halls, forums, comment boxes, or other methods of collecting data and feedback; it is much more difficult to interpret those data in a manner which is free from our own assumptions and open to being influenced by what we learn. And yet, if organizations want to strive to move beyond a model of token representation to one of equity and inclusion, this willingness to change based on what members of the community say they need must be central to those efforts.

*Be intentional, mind your impact, and strive for ownership.*

Boards must also be mindful about both intention and impact. Good intentions are often insufficient in generating positive impacts on their own. Likewise, the leaders of many network organizations cited that achieving positive impacts led to a diminished focus on continuing to advance their good intentions. That is to say, the danger of focusing solely on impact is that it can cause organizations to lose sight of opportunities for continuous improvement, emphasizing chosen metrics of success over the mission of the organization. Instead, boards need to strive for what one interviewee called “ownership,” focusing their attention on generating positive impacts while also centering the good intentions of their mission, so that they may recognize and seize opportunities whenever they present themselves.<sup>15</sup>

#### *Case Study 1: Recognizing (and Challenging) Assumptions*

This well-established organization operates across a rural area in the West where a majority of the population has historically identified as non-Hispanic white. Because of this, for most of the organization’s history, ‘diversity’ with respect to governance has meant looking to diversify the range of skill competencies represented across their board membership in order to better serve their community. When the current executive director and board chair both joined the organization a few years ago, the board was predominantly comprised of non-Hispanic white professionals well established in their careers. Most of the board structure and operating procedures in place had evolved naturally over time, and while most board members agreed there were areas in which the organization could be more effective, the general consensus was that the organization was well positioned to represent, consider, and address the needs of the people it served.

However, the new leadership quickly noticed an issue: because the organization had expanded organically over the course of several decades to provide different programs (including development, homeowner education, financial services, a hardware store, and others), it had developed a very complicated internal structure. Different employees in different branches received different benefits for similar work, and internal promotions often took the form of simply relocating a worker from one branch to another with better compensation. Realizing not only that this produced inequities for staff, but that those inequities were then reflected into the quality of services offered to residents in different parts of the service area, the new leadership worked with the board to restructure the organization to intentionally consider equity and equality in its internal operations.

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<sup>15</sup> Interview by the author, remote, June 23, 2020.

In doing so, leadership began to hear from staff that these longstanding inequities in their organization reflected inequities in the community at large. Digging deeper, leadership realized that a large number of people had immigrated to the region in recent years from Central and South America. However, despite the fact that many of these immigrants had moved to neighborhoods where the organization worked, the demographics of the people whom the organization served—as well as the organization’s staff and board—had remained fairly stable. Leadership realized that, because the organization had focused on changing to better serve those whom it already saw in its community, it had failed to respond to how the community had evolved over time.

With this realization, the executive director and board chair worked with the board to take better advantage of the ongoing organizational restructuring. They took part in NeighborWorks’ Excellence in Governance program to examine their board structures and develop new practices, and after the program they hired their coach as a consultant to help them continue their work. Internally, they hired a new Director of Advocacy to better engage, respond to, and reflect the evolving needs of their community, and the board is currently engaged in conversations around how best to allocate resources to support this work. While board members say that meetings are less “comfortable” now than they were before these changes, they report being excited by the prospect of improving the organization’s ability to listen to the community and change to better serve its needs.

*Sources: Interview by the author, remote, July 13, 2020.  
Interview by the author, remote, July 24, 2020.*

### *Case Study 2: Examining the “Equity in Our DNA”*

This organization serves an urban area along the Atlantic Seaboard, and its current leadership and staff celebrate its founder for fostering an environment of inclusion and accessibility that persists to this day. As in other organizations, interviewees expressed this idea with the phrase “Equity is in our DNA,” and they cited a number of programs that intentionally center equity considerations in their implementation. Through ongoing and conscious efforts, the demographics of the board reflect the racial diversity, gender parity, age breakdown, and socioeconomic statuses of the community which they serve. While the organization is affiliated with a particular religious tradition, they strive to make sure that members of other religious communities feel included and welcome in their work.

However, after the founder left the organization, members of the board had differing views on how the organization should proceed. Many felt that they should double down on the efforts their founder had spearheaded, focusing on better serving those already being served by the organization. Others felt that the spirit of the organization was one of welcoming those not already present, and that the organization should look to expand its service offerings accordingly. The board’s leadership decided to take part in NeighborWorks’s Excellence in Governance program to work out an answer to these questions. During this time, they worked



with their coach to examine how best to center REDI in their work and how to grow as a community-based organization.

Through these conversations, they realized that while their organization's efforts to center inclusion were good, they were not perfect. In particular, they recognized a blind spot in serving the needs of LGBTQ+ individuals in their community, which they attributed to the combination of a religious affiliation which may discourage such individuals looking for support and the lack of any intentional outreach from the organization to these members of the community. The organization is now taking intentional steps to expand its outreach and programs accordingly, and the board is now in the process of debating how best to institutionalize this self-reflection to continue to advance their REDI practices.

*Sources: Interview by the author, remote, August 6, 2020.  
Interview by the author, remote, August 7, 2020.*

## Root in Data and Story

*“We don’t think our way into new ways of acting.  
We act our way into new ways of thinking.”*

**An NWA EIG Coach<sup>16</sup>**

In assessing the unique needs of their community and the people whom they serve, many interviewed organizational leaders cited the impulse to root their efforts in data, stories, and history. However, most followed this sentiment with a caution: while it is necessary to begin from a place of understanding, the endless pursuit of better metrics can blind one to concrete steps that can be taken immediately by the organization. Further, interviewees emphasized the need to use both quantitative and qualitative data in informing their work advancing REDI. Quantitative metrics and analyses are critical to understanding problems and progress being made in advancing REDI, but such data must be undergirded by an understanding of history and the qualitative lived experiences of board members, staff, and people in the community in order to be impactful. Such qualitative data provides crucial context for identifying organizational priorities, relevant metrics, and proper implementation goals. Particularly for NeighborWorks Network Organizations, who have to meet certain board composition requirements as part of the network, a better understanding of the intersection of data, stories, and history can help boards avoid being overly focused on required metrics to the detriment of other important outcomes.

*Shared information provides shared context and understanding.*

A number of interviewees reported that a better understanding of history, community stories, and data not only gave them a more informed view of existing programs, but that it also gave board members a shared starting point and common language for engaging in generative strategy and planning conversations. Since board members may come into the organization with different levels of familiarity with the work and history of housing advocacy, several placed a premium on fostering this understanding during the onboarding process and subsequent board retreats. In this

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<sup>16</sup> Interview by the author, remote, June 17, 2020.

regard, several interviewees cited Richard Rothstein's *The Color of Law* as an invaluable resource for housing and community-based nonprofits in particular.<sup>17</sup> Others additionally cited Ibram X. Kendi's *How to Be an Antiracist* as a must-read for leaders of community-based organizations.<sup>18</sup>

*Examine and refine the quality and resolution of your data.*

When we talk about data in the context of REDI, we want to include data about the organization in that conversation. For many boards, reinventing their board recruitment matrix with REDI in mind was an important starting point in highlighting their existing diversity of representation in leadership. Some commonly collected pieces of data reported as part of these customized board matrices included race, ethnicity, gender identity, age, disability status, income bracket, industry, immigration status, sexual orientation, and residential zip code, as well as professional backgrounds and skills. Capturing this information also allowed boards to better understand the turnover rates of members, which several organizations highlighted as a metric of their ability to foster an inclusive and welcoming environment for board members from different backgrounds. Additionally, several organizations' executive directors and board chairs highlighted the importance of regular, anonymous staff surveys to gain a better understanding of feelings of belonging and inclusion across different power levels within the organization.

*Provide greater access for community voices and actively engage with ideas surfaced by them.*

While this point certainly applies to situations like town halls and community events, it also applies to the internal operations of governing boards. One requirement for NWOs' board composition is that at least one-third of the governing board must consist of residents from the community which the organization serves. Every interviewee cited this as an invaluable starting point for advancing REDI, but several commented that overreliance on this metric had previously limited their understanding of their board's culture and climate. In particular, many interviewees reported that, while their board composition numbers met their NWA requirements, upon further reflection they realized that board members from the business and public sectors frequently dominated discussions, unintentionally sidelining members from the residential community. The relative amount of time different board members spent speaking during meetings was thus cited as an informal metric of feelings of inclusion in the room, providing boards with an important piece of information as they sought to advance REDI within their organization's governance structures.

*Case Study 3: Data Gets People Talking (and Telling Stories)*

After thirty years on the job, the executive director of this long-established organization in a rural part of the Northeast was retiring. He had overseen the expansion of the NeighborWorks organization from a small community real estate entity to one that provided a broad array of housing and employment services. Since he had personally recruited most of the board, members felt largely unable to envision the organization without him. While he was confident in their ability to see the organization through his succession, he wanted to make sure his board members shared that confidence. With his encouragement, the board decided to take part in NWA's Excellence in Governance program with the broad goal of strengthening the board's

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<sup>17</sup> Richard Rothstein, *The Color of Law: A Forgotten History of How Our Government Segregated America* (New York: Liveright, 2017).

<sup>18</sup> Ibram X. Kendi, *How to Be an Antiracist* (New York: One World, 2019).

institutional structures and interpersonal trust.

In the words of the organization's former board chair, it was while taking part in EIG that board members began to realize that "[REDI] was more than just inviting people to the party, but also asking them to dance." Encouraged by their EIG coaches, members of the board created a customized matrix which took into account not only the professional backgrounds and skills represented on their board, but also demographic information such as race, ethnicity, and gender. Laying out the data this way immediately made it apparent "whose voices were missing" in a way "that was so clear you couldn't ignore it." The organization's leadership overwhelmingly identified as male and non-Hispanic white, with only a handful of African American members and no Latinx representation, despite serving a community whose residents were predominantly Black and brown.

To be clear, this "demographic matrix wasn't revealing anything new," as one interviewee put it. Rather, its value was in providing concrete evidence to get board members to acknowledge and talk about an uncomfortable truth. In particular, for a member of the board who identified as African American, the matrix represented an empowering tool to facilitate factual discussions around diversity and inclusion on the board. Still, interviewees were quick to point out that while the data contained in the matrix clearly revealed the problem, it did not prescribe the solution.

That solution would come when the board, encouraged by their EIG coach, collectively decided to take a retreat. There, they focused not only on examining their internal decision-making structures, but also on building interpersonal relationships and listening to one another's stories about their time on the board and in the community. Aided by the demographic matrix, they increased their awareness of whose stories were not represented in that conversation—and thus of the possible gaps in their understanding of the organization's programs and potential—and resolved to prioritize advancing REDI within the organization, starting with their search for a new executive director. After an extensive search, they hired "far and away the best candidate for the job," who "also happened to be a local from the area and a person of color."

Today, the organization's executive leadership and senior staff are majority people of color. While the board as a whole is still predominantly composed of people who identify as non-Hispanic white, members are now working on increasing its diversity and fostering inclusion among their ranks. While these efforts have led to some shifts in the culture and workings of the board—which, interviewees admitted, were uncomfortable for many members at first—the overriding feeling is one of excitement for the future: "Our new culture is [one of] a strong working board and interpersonal trust."

*Sources: Interview by the author, remote, July 14, 2020.  
Interview by the author, remote, July 24, 2020.*

## Focus on People

***“Our role [as NeighborWorks] is not to ‘do to.’ It’s to ‘do with.’”***

**An NWO Board Member<sup>19</sup>**

Advancing REDI is fundamentally about examining who is in the room when decisions are made and how involved those people’s voices are during that process. Thus, efforts to implement REDI as a decisional framework must necessarily focus on understanding people and the relationships which bind them. This focus includes not only identifying who is not in the room, but also identifying the values, wants, and needs of the people who are currently present at the table.

*Boards are comprised of individuals volunteering their time and expertise.*

While this is far from a revolutionary statement, many interviewees spoke to the need to continuously remind themselves and their colleagues of this fact. Nonprofit boards are often spoken about as singular entities, but as anyone who has served on or worked with one knows, this is far from the case. A thorough consideration of the individuals in the board room is essential to making progress on any issue of governance or strategy, and the degree to which each individual board member feels their time and expertise are valued by the organization and their colleagues must be a key component of those considerations.

*Time is the most important asset people have. They spend it on work that is important, not easy.*

This point about individuals also speaks to the manner in which board members are recruited. Marshall Ganz, the Rita E. Hauser Senior Lecturer in Leadership, Organizing, and Civil Society at the Harvard Kennedy School, teaches that, when motivating people to act, individuals are more likely to invest their energy in efforts when they feel they can contribute something important to those efforts, not just when they feel that it would be easy to do so.<sup>20</sup> However, board recruitment conversations are frequently couched in terms of diminishment, with current board members telling the potential recruit that they would ‘just’ be required to do this or that. While this is meant to advertise the relative ease of the position to a busy potential recruit, many interviewees reported finding that it also subtly signaled a lack of importance. Some interviewees then hypothesized that this signaling caused them to lose out on some potential recruits who didn’t feel that the opportunity was ‘worth it’; others additionally reported that this recruitment style created significant barriers to change whenever board members felt that they were being asked to do more than what was initially pitched to them. As a result, several interviewees had changed their recruitment approach to place greater emphasis on the importance of the work, with one interviewee saying, “We ask for [a board member’s] time, but we don’t waste it,” and later adding, “Time is the most important asset people have.”<sup>21</sup> These interviewees reported that making this change typically made it more time-consuming to fill seats on the board, but they also found that new members were generally more productive and satisfied by their role with the organization. That is, individuals on the board felt valued by being asked to do something valuable.

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<sup>19</sup> Interview by the author, remote, August 5, 2020.

<sup>20</sup> Marshall Ganz, "Public Narrative, Collective Action, and Power," in *Accountability Through Public Opinion: From Inertia to Public Action*, eds. Sina Odugbemi and Taeku Lee (Washington, DC: The World Bank, 2011), 273-89.

<sup>21</sup> Interview by the author, remote, July 27, 2020.

*Back up important work with the support and resources people need to accomplish it.*

Of course, individuals need to feel not only that they are being asked to do important work, but that they will be able to actually accomplish that work in a meaningful way. To this end, it is critical that individuals asked to advance REDI and drive cultural change feel empowered—both in terms of resources and leadership support—to do so. A number of board chairs I interviewed said that they felt out of their depth when they first assumed the role, and those who received formal or informal mentorship from the previous board chair reported that it was invaluable in helping them to more quickly understand their position and lead effectively. Similarly, several interviewees reported that, since different board members had different professional and lived experiences, individuals often had gaps in their understanding of the organization’s various functions (such as real estate, finance, etc.), effectively creating information silos aligned with board members’ existing expertise. An oft-cited strategy to successfully combat this siloing was the implementation of teach-ins or seminar series, where members of the board, staff, or outside experts would educate board members on areas with which they felt less comfortable. Of course, this need for resources and support also applies to staff working to advance REDI within the institution, particularly any asked to serve in a Chief Diversity Officer role or similar function. While employee resource groups or affinity groups can serve a vital function in this regard, organizational leaders should take care to ensure that such support goes beyond merely a dedicated space for discussion to provide opportunity for operationalizing ideas.

*Resilient relationships, based in trust and facilitated by grace, are essential.*

Across interviews, the most commonly cited barrier to advancing REDI was individuals’ fear of the unknown. That is, interviewees reported that board members’ hesitancy to take bold steps to advance REDI came from a concern that, if the composition or culture of the board changes—as is inevitable when fostering a more inclusive and diverse environment—they may no longer be of as much individual value to the organization, or else the organization may evolve into something new. While such growth is often a sign of a healthy organization, it nevertheless can feel at odds with our earlier emphasis on individuals’ importance to the organization and thus make strategy discussion concerning REDI feel inherently personal. Therefore, robust interpersonal relationships are essential to moving the needle forward. In the words of one interviewee, these relationships must be “based in trust and facilitated by grace,” as disagreement and discomfort will necessarily be a part of these conversations.<sup>22</sup>

*Culture change is a collaborative effort, but often requires a leader to drive the change.*

Diving into the literature on shifting organizational culture, one will encounter seemingly competing theories of change around so-called “top-down” and “bottom-up” models. The first argues that lasting institutional change is founded in the vision of leaders and the formal and informal rules they establish; the second counters that changes endure when ideas and social norms spread throughout and are widely adopted by the greater community.<sup>23</sup> Of course, most interviewees noted that, in their practice, the dichotomy between the two models was largely false, with top-down and bottom-up approaches necessarily interacting with and complementing one another in their efforts to shift organizational culture. That said, most interviewees noted that

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<sup>22</sup> Interview by the author, remote, August 6, 2020.

<sup>23</sup> This debate is laid bare in Carroll’s theory of the “three lenses,” in which the “strategic design” and “political” lenses clearly adopt a “top-down” view of organizations, while the “cultural” lens adopts a primarily “bottom-up” view.

achieving a specific kind of culture change—for example, explicitly advancing REDI in an organization and fostering a greater degree of inclusivity—typically required someone to lead the vision and drive the change. Some interviewees identified this organizational leader in their board chair or executive director, others named a particular board or staff member with relevant expertise and passion, and still others named an outside consultant or coach as being invaluable to their efforts. Of course, this pattern is likely due at least in part to the overrepresentation of Excellence in Governance participants—whose organizations receive such outside coaching as part of the program—among interviewees, but even some of those who had not participated in the program noted that external viewpoints were highly valuable in illuminating this work, especially at the onset of their REDI journey.

#### *Case Study 4: Supporting Individuals to Transform the Whole*

This organization serves a diverse urban community in the Northeast. Like many other NWOs, interviewees at this organization talked about their board as being representative of their community in terms of diversity, but falling short of their goals for fostering equity and inclusion. When the current board chair stepped into the position, the board decided that NWA’s Excellence in Governance program presented a prime opportunity to work on their REDI efforts and explore new opportunities for the organization.

In particular, interviewees from this organization celebrated EIG as giving their board “space to address the elephant in the room”—that is, to acknowledge that while the board did reflect the diversity of their community on paper, the cultural touchstones and informal decision-making processes which had arisen organically over the life of the organization were now barriers to fully including new voices in the NWO’s governance. With the help of their EIG coach and outside consultants, the board worked to clarify and make explicit these decision-making processes, including the implementation of a formal committee structure. However, despite agreeing on their final objective, not everyone on the board agreed with this approach. Interviewees cited the need to meet each board member “where they were at,” with one board member describing the process of “individual learning and self-journey” as being key to the organization’s overall transformation. As part of this effort, the executive director collected and shared data, stories, and histories of race and racism to provide the board with a shared context and shared languages. Further, the board chair designated certain members as ‘REDI deputies,’ tasked with identifying and voicing REDI concerns that were not raised in the course of usual discussions. While some members decided to leave the organization’s board over the course of these transformations, the remaining members felt that the resulting governance and leadership structures were stronger and more resilient than before.

While EIG provided an opportunity to deepen knowledge and skills across the board as whole, it initially provided little support specifically tailored to the role of the board chair. “Sometimes, there’s the assumption that because you’ve been appointed board chair, you know everything,” explained the organization’s chair. “[Especially at the beginning], you often don’t really even know what you’re supposed to do.” Prompted by the organization’s executive director, the board chair asked NWA to put them in touch with another network organization’s more experienced board chair who agreed to be a mentor. The board chair cited this relationship—

particularly a monthly lunch with their mentor—as critical for making them an effective organizational leader. When asked, the organization’s executive director and another board member concurred, offering that the ability to learn from another organization and its leaders had greatly benefited their own.

Finally, while these changes were ongoing, the board chair and executive director took the opportunity to strengthen their relationship with each other. In addition to usual communications, the executive director and board chair scheduled monthly one-on-one check-ins to debrief and strategize. When interviewed, both described these check-ins as essential for the overall health of the organization, allowing both for more concrete information-sharing and trust-building. Both noted that this in turn helped them to avoid micro-managing the other. Additionally, when internal conflicts did inevitably arise, this deepened sense of trust helped to resolve things in timely and productive ways.

Ultimately, interviewees stated that these efforts to advance REDI came down to two guiding principles: patience for the journey and an emphasis on the individuals on the board. They further emphasized that the process of building the board’s ownership of REDI was an ongoing one, and that so long as the organization and its community continued to change and evolve over time, the board’s thinking about REDI would need to do the same. Currently, the organization’s leadership is examining how these internal efforts to advance REDI inform and apply to their work advancing antiracism in the broader community which they serve.

*Sources: Interview by the author, remote, June 23, 2020.  
Interview by the author, remote, June 23, 2020.  
Interview by the author, remote, June 23, 2020.*

## Form Determines Function

***“Diversity is out there—that’s not the hard part.  
Inclusivity—true inclusivity—is the hard, ongoing work.”***

**An NWO Board Member<sup>24</sup>**

In organizational structures, form determines function. In advancing REDI as a decisional framework focused on generating social change through structural improvement, the form of those structures must necessarily be top of mind. To paraphrase historian and author Ibram X. Kendi, an inclusive institution is possible only if its leaders are governed by the principles of equity, diversity, and inclusion, and then those ideas become the policies of the institution, and then those policies become the common sense of the people, and then the common sense of the people holds their leaders accountable.<sup>25</sup> In other words, once we understand that forms of exclusion are structural in nature, we must work to make our inclusion efforts structural as well.

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<sup>24</sup> Interview by the author, remote, August 5, 2020.

<sup>25</sup> Ibram X. Kendi, *Stamped from the Beginning: The Definitive History of Racist Ideas in America* (New York: Bold Type Books, 2016).

This section highlights some of the most common structural forms brought up by interviewees, but the reader should reflect on what additional systems should be considered within their own context.

*Recruitment strategies dictate who gets in the room.*

The manner and practice of recruiting new members to the board determines the candidates who will be considered for—and ultimately join—the board. Many interviewees reported that they found common models of board recruitment, such as contact or referral-based methods, to produce overly homogenous boards, as people tend to form relationships with others similar to themselves. Several interviewees cited customized board matrices as integral for informing how best to shift their recruitment strategies, with some reaching out to existing partner organizations for new referrals, some hiring dedicated recruitment firms, and some publicly advertising board openings as they would for employed positions. Two common barriers to changes in recruitment strategies were cited by interviewees: a desire among existing board members to protect the culture of the board and a lack of agreement around the prioritization of different gaps in board composition as revealed by the matrix. While there was no ‘magic pill’ for these problems, most interviewees agreed that their success in overcoming them was largely due to focusing on the individuals and relationships in the room and emphasizing the board’s responsibility for advancing the organization’s mission over the board’s culture.

*Agendas decide what is discussed.*

The items on an agenda determine what is on the slate for discussion at a given meeting, but the structure of that agenda also determines the amount of time devoted to any given item. Interviewees frequently complained that these time constraints were a major barrier to allowing room for generative questions and long-term strategy discussions, which most believed to be essential priorities for advancing REDI within their organization. A number of interviewees cited the more active use of a consent agenda as a valuable technique for reducing the time constraints imposed on the board by fiduciary responsibilities and other routine obligations. Some interviewees also discussed committee reports as an area to address, with some moving theirs to a written format, some imposing strict time limits on verbal reports during meetings, and some using a combination of both strategies.

*Budgets reveal priorities.*

Budget allocations are reflections of an organization’s priorities. While most nonprofit boards delegate budget formation to executive staff, governing boards nevertheless must approve those budgets before they are implemented; in fact, this is one of the few legally mandated functions of such a board in the United States. Thus, boards and executive staff must take care to consider the organizational priorities reflected by their budgets and ensure that these priorities are in line with the organization’s mission and the board’s vision. This is especially true for efforts to advance REDI. Several interviewees expressed some dissatisfaction that diversity efforts are often highly publicized by organizations’ public relations offices, but that equity and inclusivity work is often severely underfunded and thus overly limited in scope.

*Committee structures reinforce power dynamics.*

Because committees often play a prominent role in institutional decision-making processes, committee structures featured prominently in my interviews with board chairs. Such structures were frequently mentioned by executive directors and other interviewed board members as well.



As one would expect given that boards are comprised of individuals volunteering their time and expertise, most interviewees' board committees were initially formed with whichever members of the board were most interested in their subject matter. Typically, this subject matter aligned closely with their backgrounds and expertise: for example, members of the business community typically dominated finance committees, lawyers and public officials were commonly overrepresented on governance committees, and residents frequently sat on community engagement committees. While this structure certainly has its benefits, interviewees generally reported that it also had the effect of creating information silos and effectively concentrated decision-making power around different ideas in just a few hands. Several interviewees noted that this siloing impeded their boards' ability to address problems that impacted the work of multiple committees, as members of different committees frequently lacked the background and knowledge to fully understand their colleagues' perspectives on key issues. Others noted that such a division had the impact of deemphasizing the residents' voices on the board by instead focusing the board's discussion on areas of specialized knowledge and professional expertise. While some interviewees discussed creating more committees—or else doing away with committees altogether—the most successful approaches were ones that made a more concentrated effort at diversifying committees and providing members of each with the resources and professional development opportunities they needed to fully understand that area of the organization's functions. One interviewee also applauded their organization's recent efforts to spin off their community engagement committee into a stand-alone residential advisory board, which allowed them simultaneously to integrate the residents already on their board into other committees and to expand the number of residents with a voice in the organization's decision-making processes.

*Terms and term limits drive rates of change.*

Board turnover and leadership succession are natural, inevitable processes which present chances for organizational growth, so limits on board members' terms of service create a structural means to better foster this growth over the long term. While most interviewees who broached the subject recognized that terms and term limits can be sensitive topics for many board members, every interviewee who discussed their implementation on their board spoke about them as a net positive for the organization. Interviewees also highlighted that these structures can take many forms. Some imposed term limits only for officers with no limits on board membership. Others imposed terms on board membership but used the time markers solely as an opportunity for members to reflect and reaffirm their desire to remain on the board. Still others firmly capped the number of years which a member could serve on the board, though most organizations were still able to find ways for interested and valued members to remain involved after their term limits were reached. In all cases, interviewees reported that a structured cycle of leadership changes prevented organizational stagnation and better allowed new voices and ideas to be heard.

### *Case Study 5: “The ‘Bankers Versus Residents’ Problem”*

This Southern organization has deep roots in its community and was repeatedly cited by other interviewees as a leader among NWOs in advancing REDI. However, the executive director was quick to point out that its success in advancing REDI was the result of intentional, sustained efforts over the organization’s lifetime—and that the work was far from finished.

On paper, it’s easy to see why other NWOs held up this organization as a model for REDI. Over the last decade, its leadership has been vocal about intentionally centering representation considerations in their hiring and recruitment efforts. Today, roughly half of leadership and board positions are held by people of color, and the staff reflects the diversity of the community being served across several dimensions, including race, religion, age, gender identity, and sexual orientation. Interviewees celebrated this diversity not only for its positive impacts on the organization’s programming and internal decision-making, but also for its positive impacts on long-term strategy considerations. In particular, they noted that diverse boards are more likely to consider a wider variety of factors and ideas in board recruitment and succession planning, which, in turn, helps facilitate the organization’s continual evolution and growth over the long term.

However, these concerted efforts around diversity resulted in an unanticipated consequence for efforts around inclusion: a growing gap between those board members who made large monetary contributions and/or significant in-kind professional assistance, and those board members who lived in and represented the community served by the organization. In particular, a board member for this organization highlighted what they called “the ‘bankers versus residents’ problem,” whereby higher-income board members and those with professional financial expertise would dominate board discussions around budgets, fundraising, and other financial matters. Their dominance, in turn, often made lower-income board members and those who lived in the community feel both ill-prepared and unwelcome to engage in these conversations. Since budgeting and fundraising priorities both shape and are shaped by the organization’s strategic priorities, this situation effectively shut most of the board’s resident members out of the organization’s generative conversations around strategy.

To combat this problem and facilitate better generative strategic conversations, the board’s leadership decided to restructure its debate and decision-making processes. In particular, the board placed a greater emphasis on committees for most matters, with each committee balancing representation from board leaders, community representatives, and board members with expertise in the specific area. Committees would meet independently from the board to discuss and decide matters within their jurisdiction, before reporting to the whole board for final approval at the next meeting. While this process required that board members trust one another to not be involved in every conversation, it also gave members an opportunity to specialize in matters related to a particular committee. This specialization was facilitated, first, through the passive mechanism of the committee structure, as an additional meeting time devoted to one topic area allowed committee members to go into much greater detail about it; and, second, through the active mechanism of institutional support, as the organization was better able to target educational, professional development, and learning supports to those

members on specific committees. Additionally, these institutional supports were also expanded to include deeper dives into the organization’s programming and initiatives for all interested board members.

After some trial and error, meetings of the full board were then reoriented to focus more on generative conversations. First, to free time for matters requiring the board’s attention, the board began using a consent agenda to pass the routine minutia of board activities. Second, committees were expected to prepare a one-page report before each meeting of the board, which other board members were expected to read before the meeting. Leadership at this organization reported that the brevity of these reports, combined with the mixed backgrounds on the committees, greatly facilitated the communication of complex topics between board members with different backgrounds and levels of expertise. However, as questions inevitably arose, each committee was given time to provide further details during the full board meeting.

As it applied to “the ‘bankers versus residents’ problem,” interviewees reported that these structural changes have yielded impressive results. Members of the finance committee now had the dedicated time and resources they need to fully understand matters before them, and the mixed backgrounds of members on the committee meant they were better able to communicate relevant information to the diverse members of the rest of the board. Resident board members reported feeling more confident and included in generative conversations, and board leadership reported seeing broader engagement and more satisfaction with the board’s generative strategic conversations.

Looking to the future, the organization’s leadership is now experimenting with digital polling and other online tools to gauge board members’ needs. While these efforts arose largely as a result of the work-from-home paradigm shift of the COVID-19 pandemic, leadership reported now seeing these anonymized tools as a possible means to more accurately gauge board members’ feelings of inclusion and inform the next steps on their REDI journey.

*Sources: Interview by the author, remote, August 5, 2020.*

## Iterate, Iterate, Iterate

***“REDI is not an initiative with a start or an end. It’s a journey.”***

**An NWO Executive Director<sup>26</sup>**

Organizational culture change takes time. Just as people and communities change over time, so must the approaches of the organizations seeking to serve those communities. Weaving the REDI framework throughout the functions of the board and organization requires continuous evolution and adaptation to new situations. As several interviewees highlighted, this work is a journey that is never finished. Organizations must continue listening with a willingness to change, refining their data and seeking out new stories, prioritizing the focus on and empowerment of people, and evolving their forms to unlock new functions. As a decisional framework, REDI is focused on

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<sup>26</sup> Interview by the author, remote, June 23, 2020.

continuous improvement, and while most interviewees reported that they still felt they had a long way to go, they thought their sustained focus on race, equity, diversity, and inclusion improved their ability to serve and advance their organizations' missions and key priorities.

*Celebrate progress, but don't rest on your laurels.*

Several interviewees said it was difficult to balance celebrating progress with acknowledging the need for continued effort. Some highlighted that failing to celebrate successes can have a negative effect on morale, as the continued presence of more work that needs to be done can make it seem like no progress has been made. However, others highlighted that too great an emphasis on smaller successes can reduce a sense of urgency about larger goals, and that overly frequent celebrations can make REDI efforts feel more like a publicity stunt than a substantive change. Board leadership must strive to find the balance between celebrating progress as it is made and maintaining their focus on continuous, ongoing improvement.

*Case Study 6: A "Culture of Evolution"*

This organization serves a predominantly Black community in the Midwest and was frequently cited by other interviewees at other NWOs as a model for advancing REDI within institutional governance and leadership structures. As the executive director tells it, these efforts to advance REDI within the organization grew organically out of a pragmatic desire to more effectively meet the needs of their community. Over time, they've sought to become more intentional in their approach, but they repeatedly pointed to this "culture of evolution and continuous improvement" as an essential component of their REDI journey.

When the executive director started with the organization in the 1990s, they primarily worked to provide community residents with affordable rental housing options. In the decades since, they have expanded to offer a range of programs and services related to housing and economic mobility, driven by a desire to listen to members of the community and meet the needs which they expressed. The executive director cited the organization's data and story collection efforts as crucial to this work and emphasized the need to provide board members with the resources they needed to feel included and empowered in their decision-making. Following a recent review of their board and staff matrices, leadership at the organization made the decision to remove questions about felony convictions and requirements for college degrees for many positions, citing a need to better incorporate these voices from the community in the organization's staffing efforts.

Key to this work are principles of transparency and accountability. In addition to their semimonthly meetings with the board's executive committee, the executive director provides all organization staff with a quarterly report that explicitly discusses race and gender in the context of hiring, promotions, terminations, etc., in an effort to illuminate the organization's biases for all involved. While leadership informally collects feedback from staff on an ongoing basis, they also conduct a formal staff survey every four years to collect information about organization culture and to identify possible areas of growth for REDI efforts. The executive director, in an effort to hold themselves accountable to this desire for growth, formally tied part

of their regular board performance review to that survey. When asked about this, the executive director called it “a call to action for myself,” highlighting it as a mechanism for keeping their focus trained on improving the cultural well-being and productive efficacy of the organization. This mechanism necessitates that efforts to advance REDI in the organization have a purpose and fit into a broader whole, rather than existing solely as brief initiatives or one-off measures.

Following the summer of 2020’s national spotlight on racism, the leadership of this organization has focused these mechanisms on improving institutional understandings of race and racism. They’ve also sought out ways to improve the organization’s own REDI structures, piloting a new HR initiative to collect anonymized input around organizational cultural and needed supports on an ongoing basis. As the executive director explains it, promoting inclusion and belonging among staff and leadership is essential for serving the organization’s mission: “We get up in the morning because we want to help people, and we want to do that as best as possible.”

*Sources: Interview by the author, remote, July 27, 2020.*

## Conclusion

*“Culture eats strategy for breakfast.”*

**An NWO Executive Director<sup>27</sup>**

This project has sought to provide the reader with generalizable lessons, punctuated with specific examples, for advancing REDI as a decisional framework in nonprofit governance and leadership structures. It has shown that several considerations must go into an organization’s strategy, not least of which are the principles that no single size fits all, that efforts must be rooted in data and story, that efforts must focus on people, that form determines function, and that constant and ongoing iteration is key.

Here, it is worth returning to the quote at the top of this page: “Culture eats strategy for breakfast.” Stated by an interviewee who attributed it to common managerial wisdom, this idea is often understood to mean that the best strategies for advancing REDI are entirely dependent on the culture of the community and organization in which one intends to implement them. At face value, then, it would seem that a paper discussing promising practices and strategies for advancing REDI that may broadly apply across institutions would miss the point.

There is, however, a deeper lesson behind this quote: the strategies taken by organizational boards and leadership must themselves account for the institution’s cultural and community contexts, and they must seek to address the structural barriers in the way of organizational cultural change. Put another way, nonprofit leaders seeking to advance REDI within their organization must pay heed to needs of their organization and community at all levels. They must root their efforts in localized data, including stories drawn from the community they seek to serve. They must focus on the people that surround them, modifying their forms to unlock the functions they seek to deploy. And they must iterate on these ideas, recognizing that there will always be more room to grow and develop as an inclusive institution.

In short, they must recognize how their community’s culture will impact their strategy, and they must strategize with their community at the center.

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<sup>27</sup> Interview by the author, remote, July 27, 2020.