

## **Moving Justice and Equity Aspirations into Nonprofit Organizational Change and Equity and Justice Impact**

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### **Abstract**

In response to the nationwide racial awakening in 2020, The Nonprofit Justice and Equity Institute (The Institute) was created to advance justice and equity in policy and practice for organizations and the communities they serve. A framework for an effective process implementing inputs and resulting outcomes and impact was outlined in a Theory of Change. In evaluating this model, the positive and incremental impact for diversity, equity, and inclusion was demonstrated. A model framework of The Institute has emerged that may be widely adopted for use by organizations in any community.

### **Introduction**

The unjustifiable murders of George Floyd, Breonna Taylor, and Ahmaud Arbery in 2020 reinforced that we live in an unjust and inequitable society. The nationwide rallying highlighted the United States' urgent need to recognize and confront racism in both its past and present. Racial awakening engages various cultures and backgrounds to support and uplift Black and African American cultures. It also encourages fighting against racism and racist acts.

Community-based nonprofit organizations serve and provide resources specific to local residents in underserved areas. The Alliance for Health Equity's (The Alliance) response to racial awakening was to understand that nonprofits that are supposed to support and uplift its local residents are unjust themselves. To counteract this, The Nonprofit Justice and Equity Institute (The Institute) was developed to support nonprofits to self-assess and become socially responsible for unintentional inequitable practices, programs, and processes within their organization's culture. The Institute was co-created by The Alliance and the Tammy Dowley-Blackman Group LLC (TDB Group).

The Institute was launched with Cohort 1 in 2022 and Cohort 2 in 2023. Eight organizations for Cohort 1 and nine organizations for Cohort 2 completed participation in The Institute.

*A note on language:*

*This article often refers to “DEI,” in part because it has become a common overarching term that many people associate with justice and equity and in part because it is in the name of the spectrum tool used to assess impact: the Myer Memorial Trust Spectrum Tool for Diversity, Equity, and Inclusion. It is important to note that the use of this language is not intended to exclude any efforts in equity advancement. It is recognized that organizations may have their own specific language that better describes their current goals and needs. The use of this language as “DEI” is not meant to place any limits on opportunities to progress an understanding of equity and justice advancement in policy or practice.*

## **The Institute: Goals and Theory of Change**

The Institute aims to provide knowledge, tools, and capacity to the nonprofit sector to assist them in recognizing and correcting their current and/or past practices that perpetuate institutional discrimination, racism, and injustice.

The primary goals of The Institute are:

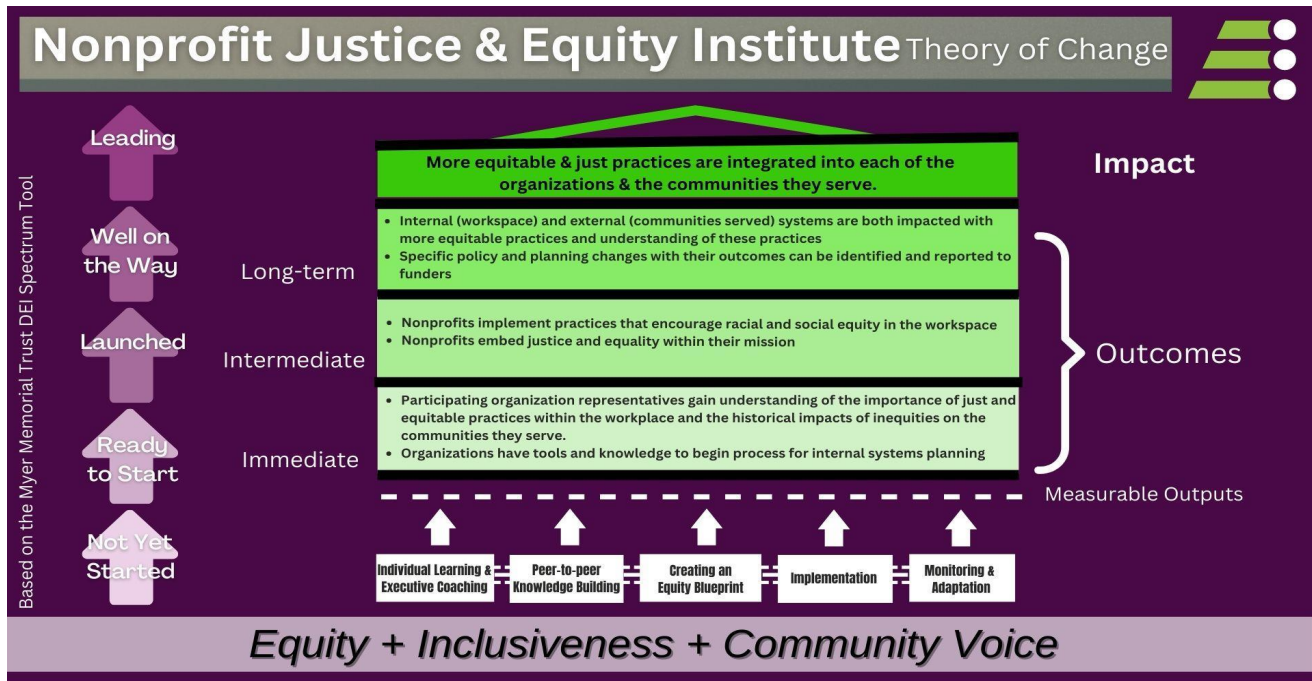
- Understand the historical context of racial and social inequities and its impact on the community.
- Participate in capacity-building coaching to advance justice and equity learning and action.
- Commit to centering justice and equity into a tailored organizational blueprint to sustain learning and accountability of the organization and community.

Customized strategies are centered around how race and other inequities impact the institution’s operations, programs, and service delivery, as well as their ability to have meaningful social impact in fulfilling their mission. The Institute positions the organizations to respond/ behave differently in their practices, programs, and processes.

The actions of each cohort of the Nonprofit Justice and Equity Institute are as follows:

- *Organizational Readiness Assessments*: Each nonprofit participates in an individualized Readiness Assessment to determine its organizational stage. This action takes place several months before beginning learning sessions.
- *Capacity Building Coaching*: Each nonprofit receives tools and individual technical assistance to assist in increasing knowledge and skills to adopt and implement a justice and equity roadmap. This action is scheduled between the organization and coaching team during the five-month time span coinciding with the learning sessions.
- *Knowledge Building*: Cohort participants (four individuals per organization) collectively participate in 7 interactive learning sessions with peer nonprofits.
- *Standardized Curricula Models*: Seven learning sessions replicated for synchronous and asynchronous use. Learning sessions are scheduled in a series over five months.

- *Evaluate The Institute’s Model and Impact:* Assessment can determine if it is a model for scaling/replication and demonstrate the primary factors in centering justice and equity into a tailored organizational blueprint.



A Theory of Change was developed to demonstrate the inputs and expected outcomes and impact. Impact assessment is largely based on the Myer Memorial Trust Spectrum Tool for Diversity, Equity, and Inclusion. The Spectrum Tool is meant to help guide discussion and identify areas of opportunity rather than creating space for judgment. Even, and especially when members of the same team see their organization as landing in different places on the spectrum dimensions of DEI, this can facilitate conversation amongst team members for practical areas of improvement.<sup>i</sup>

*A Note on Supporting Organizations for Optimal Performance:*

*This opportunity for team discussion supports optimal organizational performance according to principles of Appreciative Inquiry (AI) which are rooted in Positive Organizational Scholarship (POS). Of the 5 principles of AI, the constructionist and the simultaneity principles are prominent in this conversation process. The constructionist principle means that language and conversation help to create new realities. The simultaneity principle recognizes any question as an intervention, and that change begins with the first question.<sup>ii</sup>*

The Spectrum Tool helps to identify an organization’s progress according to 12 dimensions of DEI work across a continuum of five categories from “not started” to “exemplary.” The 12 dimensions of DEI work are:

1. DEI Vision
2. Commitment
3. Leadership
4. Policies
5. Infrastructure
6. Training
7. Diversity
8. Data
9. Community
10. Decisions
11. Accountability
12. Inclusion

The five category stages on the continuum are:

1. Not Yet Started
2. Ready to Start
3. Launched
4. Well on the Way
5. Exemplary/Leading

Definitions for each of the dimensions at each of the five categories may be accessed on the full chart of the Myer Memorial Trust Spectrum Tool.<sup>iii</sup>

Ultimately, The Institute’s impact should be that “more equitable and just practices are integrated into each of the organizations and the communities they serve,” as demonstrated in the Theory of Change.

### **Measuring Impact**

A critical aspect of the success of The Institute, especially in the initial stages, is evaluation for learning and adaptation. An evaluation of The Institute was performed retrospectively for Cohort 1 and is ongoing for Cohort 2. Four organizations from Cohort 1 and all nine organizations from Cohort 2 have participated in the evaluation. Initial findings of this developmental evaluation provide insights into impact and areas of opportunity for future cohorts.

Core components of the evaluation for both cohorts were to be completed by the organization's Executive Directors or other leadership that participated in The Institute if the ED was/is unavailable. These components include:

- *Pre- and Post-Institute Surveys* assessing impact according to the Myer Memorial Trust Spectrum Tool.
- Post-institute interviews to learn from experiences and identify areas of opportunity to better support nonprofits in meeting their justice and equity journeys.

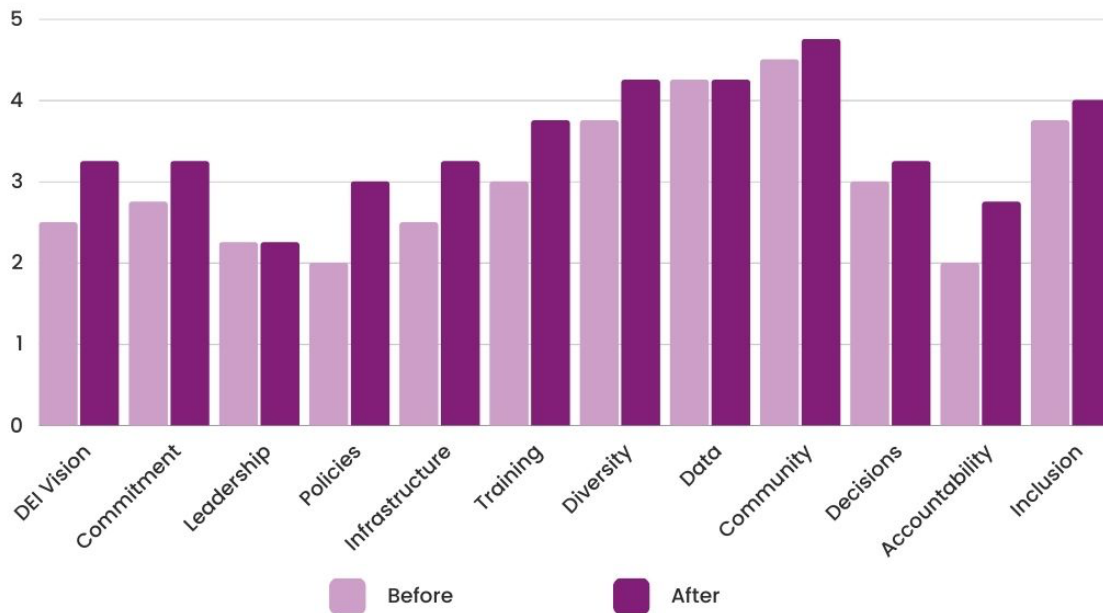
*Surveys and Impact*

For Cohort 1, an analysis of DEI progress from the survey demonstrates overall positive movement on the Spectrum Tool. The survey responses were analyzed as quantitative data. For each of the twelve dimensions, the measures were 1, 2, 3, 4, or 5, depending on which category they landed on the Myer Memorial Trust Spectrum Tool for DEI. The higher the number, the better the DEI progress. For example, a score of 1 means “not yet started,” and five means “exemplary/leading” in that dimension.

The average of the scores demonstrated that ten dimensions saw improvement, and two stayed the same. The dimensions that stayed the same were “leadership,” with a score of 2.25, and “data,” with a score of 4.25. The average of the reported scores of the organizations before and after their participation in The Institute is presented in the bar graph below.

## Cohort 1 Survey Results: Before/After

Average score on the Myer Memorial Trust Spectrum Tool for DEI



Notably, one organization did not report any movement – negative or positive – in any of the 12 DEI dimensions. All other organizations reported improvement in at least six dimensions. One organization reported improvement in 9 of the dimensions.

Survey findings for Cohort 2 have not been fully analyzed as that evaluation is ongoing. By design, Post-Institute surveys are distributed months after participation in the learning sessions to provide ample time for reflection and implementation. For Cohort 2, Pre-Institute Survey responses from before participation in The Institute were highly diverse across each of the 12 dimensions. The dimension that displayed the highest average category on the spectrum was an approach to the “community.” The dimensions that displayed the lowest average category on the spectrum were the approach to “accountability” and “policies,” closely followed by “leadership” and “infrastructure.” This demonstrates four prominent areas of opportunity for DEI growth. An analysis and comparison with the Post-Institute Survey with reported status after participation in The Institute will demonstrate the DEI progress (status change) of Cohort 2 organizations before and after their participation in The Institute.

### **Cohort 1 and Cohort 2 Areas for Potential Impact**

Survey findings from Cohort 1 and initial findings from Cohort 2 both demonstrate potential areas of impact in improving organizations’ DEI performance in the categories of “leadership,” “policies,” and “accountability.”

### *Interviews and Opportunities*

Through interviews performed after participation in The Institute, the best experiences were identified, and themes emerged. These discussions surfaced opportunities for the growth and evolution of The Institute in seeking to best support nonprofits in justice and equity. Highlights, challenges, and opportunities that emerged from Cohort 1 and reinforced in initial findings from Cohort 2 are identified in the chart below.

<b>Cohort 1 Highlights, Challenges, and Opportunities Surfaced in Post-Institute Interviews</b>		
<i>Highlights</i>	Supports working through initial steps in building the DEI plan were reported as highlights and long-term tangible results of The Institute.	The community of working alongside other organizations was a highlight of participation.
<i>Challenges</i>	Organizational challenges to DEI progress include a lack of capacity (personnel, time, budget) with other major organizational tasks being prioritized.	Notable changes in both a positive and negative direction in the approach toward DEI due to the COVID-19 pandemic was observed. These ranged from attitude shifts in a positive direction toward DEI, to the lack of capacity (resources) to support progress as a result of the pandemic.
<i>Opportunities</i>	Organizations reported a desire for even more professional support after their participation in The Institute for DEI plan implementation.	Organizations sought expansion upon the understanding of vulnerable and underserved communities; this included a desire for more focus on approaches toward cultural nuances within the community served, as well as those of various sexual orientations, and those experiencing trauma.

### **Discussion: Opportunities for Implementation, Scaling, and Growth**

In its initial stages, The Institute is demonstrating positive incremental impact and capacity for positive evolution. Positive progress is made possible through the use of impact evaluation to identify strengths and opportunities for growth.

One area of particular strength appears to be the place-based approach – learning and sharing alongside organizations in the local and regional community. In highlighting that feeling of community, organization representatives noted encouragement in knowing that other organizations were asking the same or similar questions. Likewise, they emphasized benefitting from the sharing of ideas amongst colleagues from their neighbor organizations. That The Institute provided a space for nonprofit leaders to broach these issues in a safe space that might otherwise feel challenging or even intimidating to discuss was mentioned as a necessary component to DEI progress. The aforementioned constructionist and simultaneity principles of AI methodology are notably at work in this process. In scaling this model, maintaining an inter-organizational framework that allows for the safe exchange of ideas and questions amongst one another may be critical to its success.

Organizations benefitted from the tangible tools that helped to guide team discussions and design their equity blueprint. In the months after participation in The Institute, leadership had a chance to reflect on learnings, discuss them within their organizations, and possibly implement them into strategic planning. The combination of group learning sessions and individualized coaching was especially helpful in designing customized plans for implementation. A potential area of opportunity for The Institute in supporting nonprofits is possible additional coaching post-institute learning sessions to guide through the implementation process.

As organizations progressed in their exploration of DEI policies and practices, they also demonstrated an interest in expanding their understanding of equity for vulnerable and underserved communities. In The Institute, participants were encouraged to explore their use of language that best represents the needs of their organizations and communities served. In most cases, leadership noted that conversations regarding justice and equity were in the beginning stages, and therefore, language was fluid. This is an exciting opportunity for the team to build their practices and policies collaboratively, including ideas from all levels of the organization and the communities they serve.

## **Conclusion**

The Institute provides a framework to support nonprofits in advancing equity and justice through practice, programs, and processes. Evaluation has provided a working Theory of Change with inputs and expected outcomes and impact. It has demonstrated early insights into positive and incremental impacts on organizational behavior. Additionally, it has surfaced opportunities for growth, scale, and implementation that may be applied and adapted to support organizations widely in other communities.



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- <sup>i</sup> Fuglister, Jill. “Understanding Meyer’s Dei Spectrum Tool.” Meyer Memorial Trust, March 12, 2018. <https://mmt.org/news/understanding-meyers-dei-spectrum-tool>.
- <sup>ii</sup> Krattenmaker, Tom. “Change through Appreciative Inquiry: A New Way to Get Your Employees to Change without (Much) Pain.” *Harvard Management Communication Letter*, 2001, 5–6.
- <sup>iii</sup> Myer Memorial Trust. Dei spectrum tool for web, n.d. [https://docs.google.com/presentation/d/1mAFE8Yxm-aZeimIwH87be\\_HD\\_9wJFowjWRpLhb9\\_biw/edit#slide=id.g1115cf83fcc\\_0\\_5](https://docs.google.com/presentation/d/1mAFE8Yxm-aZeimIwH87be_HD_9wJFowjWRpLhb9_biw/edit#slide=id.g1115cf83fcc_0_5).