CREATING A MORE DIVERSE AND INCLUSIVE BOARD

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Bryan Orander, Charitable Advisors
Agenda

- Warm-up – Issues/Opportunities
- Research – Bryan
- Recruiting and working effectively with diverse teams/groups – Linda
- Panel – What’s Working
- Q&A
- Takeaways/Action Planning
Warm-up (Tables/Small Groups)

- Intros
  - Name
  - Organization
  - Role

- Questions/Insights
  - Is diversity and inclusion a strength or growth area for your organization?
  - What are you hoping to learn today?
Research – How are we doing?

Board Strengths
- Mission Buy-in
- Financial Oversight
- Legal Oversight
- CEO Support

Growth Areas
- Community Relations
- Board Composition
- Fund raising
- Monitoring Performance
The “Average” Nonprofit Board

- **Board Size** – from 19 (1994) to 15 (2014)

**Diversity**

- **71% Satisfied with gender balance**
- **67% Satisfied with age membership**
  - Members under age 40 – from 14% (2010) to 17% (2014)
- **31% Satisfied with Race/Ethnic membership**
  - Members of Color – from 16% (2010) to 20% (2014)

2014 BoardSource Leadership Index – Leading with Intent
Inclusion

- More than 50% demonstrate functional inclusion – policies, practices
- Less than 50% demonstrate social inclusion – interpersonal dynamics, group culture
5 Minute Case Discussions

- Food Aid
- The Regional Trust

At Tables/Groups

- How has this board unintentionally limited their new board members’ ability to participate?
- What changes might they consider?
Thoughts to Consider

- One-dimensional expectation
- Asking to speak for all/every ________
- Look at meeting time and place
- Look at board member orientation/training
- Look at room setup/seating
- Perceived “power” of the boardroom

Overcoming Hidden Barriers to Board Diversity & Inclusion - BoardSource
550 board members of color responded

- 72% African American
- 12% Hispanic, Latin, or Spanish
- 9% Asian
- 3% two or more races
- 3% American Indian or Alaska Native
- 2% other
Why Did You Join this Board?

High
- Passion for Mission (80%)
- Opportunity to Give Back

Medium
- Opportunity for Professional Growth
- Organization Needs My Skills
- Invitation from Friend or Colleague
- Desire to Work with Other Members

Low
- Prestige of Organization
- Employer Supports Organization

Vital Voices: Lessons Learned from Board Members of Color - BoardSource
Positively Shaped Your Board Experience

- Board Culture (40%)
- Leadership Opportunities (21%)
- Mission (9%)
- Orientation
- Recruitment
- Policies

Vital Voices: Lessons Learned from Board Members of Color - BoardSource
Negatively Shaped Your Board Experience

- Board Culture
- Tokenism
- Financial Expectations/Fundraising
- Tone from Leadership
- Access to Power
- Expected to be “Voice for All”
- Lack of Commitment to Diversity/Inclusion
- Too Few People of Color

Vital Voices: Lessons Learned from Board Members of Color - BoardSource
Take a Moment

- Capture Your Thoughts
- What was new information/Insight?
- What Might You Do Differently?
What is Diversity for your organization?

- Know your WHY for seeking diversity
  - Make sure everyone agrees on this and can communicate it
- Define diversity for your organization and set specific goals
  - Goals and plans make all the difference
- Identify potential roadblocks and challenges
  - Create plans to overcome them
Understanding Diversity

- What does your board need to help advance your mission?
  - Diversity does not “Trump” other needs

- Identify your preferred board member profile and needs
  - Experience, geography, profession, etc.
  - Skill sets, influence

- Be intentional about seeking diverse candidates
  - Race/culture, gender, age, LGBT, disabled, veteran, etc.
Identifying Prospects

- Your best practices:
  - Board, staff, committee members, others?
- Stay informed and up-to-date on community and leaders
- Identify community resources/organizations
  - Leadership Indianapolis, United Way, Urban League, Immigrant Welcome Center, IndyHub, Orr Fellows, INRC, AA Alliance, many others
# Creating Meaningful Experiences

## Understand Demographics

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<tr>
<th>Millennials</th>
<th>Gen X-ers</th>
<th>Baby Boomers</th>
<th>Traditionalists</th>
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- **Millennials**: Entitled, Optimistic, Civic minded, Close parental involvement, Values work-life balance, Impatient, Multitasking, Team oriented
- **Gen X-ers**: Self-reliant, Adaptable, Cynical, Distrusts authority, Resourceful, Entrepreneurial, Technology savvy
- **Baby Boomers**: Workaholic, Idealistic, Competitive, Loyal, Materialistic, Seeks personal fulfillment, Values titles and the corner office
- **Traditionalists**: Patriotic, Dependable, Conformist, Respects authority, Rigid, Socially and financially conservative, Solid work ethic

*Source: Ron Aslop, The Trophy Kids Grow Up; How the Millennial Generation is Shaking Up the Workplace (Jossey Bass, 2008)*
Creating Meaningful Experiences

- Commit to and demonstrate inclusiveness as a value
  - Show that you value diverse voices and perspectives
  - Build board, committee meeting around this
  - Seek input, ask for feedback

- Build social connections
  - Puts the heart in the work
  - Keep all interests, schedules, abilities, etc. in mind
  - Consider asking a board member or two to take this on
Creating Meaningful Experiences

- Create an individualized approach
  - Ask what they’re looking for and help them fulfill it
  - Check in from time to time

- Ask what they need
  - Answers will be different 6 months + in
  - May have to anticipate

- Keep it goin’
5 Minute Case Discussions

- Diversity in Action
  - Macy’s
  - Care, Inc.

- At Tables/Groups
  - What can you apply from these examples?
  - What challenges might you encounter?
Take a Moment

- Capture your thoughts
- What was new information/insight?
- What might you do differently?
Panelists

- Yvonne Harrington, Key Bank
- Terri Garcia, Southeast Community Services
- Mali Jeffers, Plan 2020 & Mosaic City
- Rafael Sanchez, Fineline Printing
Yvonne Harrington

- Vice President, KeyBank
- Indiana Youth Institute
- Southeast Community Center
- John H. Boner Community Center
- Madame Walker Theatre Center
- Near North Community Development Corporation
Terri Garcia

- Executive Director, Southeast Community Services
- Southeast Neighborhood Development (SEND)
- Healthnet
- Indiana Plan
- American Red Cross – Indiana
Mali Jeffers

- Love Indy Manager, Plan 2020
- Founder, Mosaic City
- Indiana Humanities
- Indy Hubs’ Exchange
- Big Car
- Downtown Indy Marketing Board
- Indianapolis Urban League The Exchange
- 100 Black Men Young Professional Council
- Indiana Avenue Cultural District League
Rafael Sanchez

- VP of Business Development & Legal Affairs, Fineline Printing Group
- Former Partner, Bingham Greenebaum Doll, LLP
- Secretary, 2018 Super Bowl Bid Committee
- Secretary, Indy Chamber
- Board Chair, Cancer Support Community
- Executive Committee, United Way
- Past Chair, Leadership Indianapolis
Panelists

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Recommendations from Vital Voices

- Actively Recruit Board Members from Diverse Backgrounds
- Proactive policies, practices, values – Diversity Statement and Goals
- Be willing to openly discuss Diversity and Inclusion
Thank you

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