Unrealized Impact

The Case for Diversity, Equity, and Inclusion

XIOMARA PADAMSEE | **BECKY CROWE**

WITH LYLE HURST | ERIN TRENT JOHNSON | LESLYE LOUIE | FRANCES MESSANO | TANYA PAPERNY

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A Note From The Foundation Working Group
by Frances Messano

Issues of diversity, equity, and inclusion matter — in our communities, in the business world, and most certainly in our schools. While this is not a new insight, there is a heightened level of discussion about diversity, equity, and inclusion in recent years. And it is a core issue in education, especially since teachers and school leaders experience our nation's demographic shifts firsthand.

Further, diverse teams have been shown to produce stronger results — in their ability to attract, retain, and satisfy employees; to increase shareholder returns in the private sector; and to improve academic outcomes in the education sector.

As we consider the challenges in education today, it is clear that an intentional focus on diversity, equity, and inclusion would yield significant benefits toward advancing educational opportunity. Yet there hasn't been sufficient field-wide data to understand how close or far away we are from realizing this goal.

The idea for this study arose from conversations with education funders, the authors, and others. We all recognized that the lack of better data on the current state was inhibiting efforts to advance diversity, equity, and inclusion across the field. As a result, a group of five funders decided to field a rigorous study to deepen our understanding of the racial/ethnic diversity of the education workforce; the diversity, equity, and inclusion policies and practices that leaders have put into place; and the effectiveness of these practices. We believed in the importance of doing this work collectively to gain a holistic understanding of the field and make a bold statement about the importance of moving from research to action to impact.

This study is a passion project for me as it was for many of my colleagues. We believe that more diverse, equitable, and inclusive education organizations will deliver better student experiences and outcomes.

We believe a more diverse workforce will help us create stronger relationships with the families and communities we serve. We believe diverse leaders will generate new ideas and inform the field's thinking so we can more quickly achieve educational equity. We believe that as education organizations learn how to create inclusive and equitable environments, all staff members will thrive and deepen their commitment to the work.

We are proud to have funded and participated in this study. Our hope is that education funders and leaders will have an open mind and heart when reading this report. Consider what the data is telling you. Consider where your organization is on its diversity, equity, and inclusion journey. Consider the work you may need to do to become a leader for equity. Identify your strengths and areas where you need to improve. And then create a plan to do something about it. Our students are counting on you.

Frances Messano is a managing partner at NewSchools Venture Fund and co-leads the Diverse Leaders investment strategy. Frances led the Foundation Working Group for this project, which consisted of:

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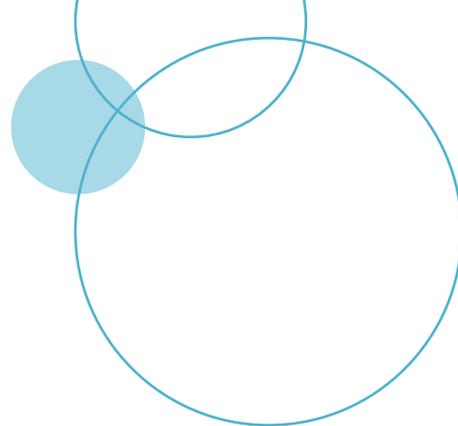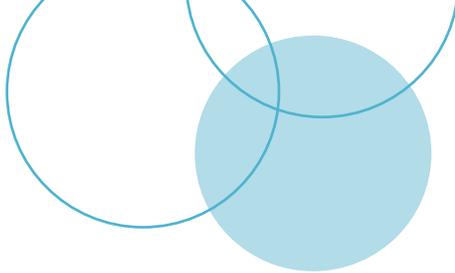
EXECUTIVE SUMMARY

Research across many sectors has demonstrated the myriad benefits of diversity to organizational health and effectiveness. Diverse teams translate to higher rates of staff satisfaction and retention and more innovative ideas. In classrooms, Black and Latinx[1] students taught by teachers who share their racial backgrounds benefit from a culture of higher expectations, fewer discipline referrals, and improved academic outcomes.

And yet, the education sector as a whole — the districts, charter management organizations, nonprofit organizations, advocacy groups, think tanks, foundations, technology providers, and others — is still far from reflecting the communities and students it seeks to serve. On top of that, a lack of consistent data collection about staff demographics; organizational efforts to become diverse, inclusive, and equitable; and the ways in which those efforts are actually experienced by staff members inhibits our ability to effectively isolate promising practices, measure progress, and hold one another accountable.

This purpose of the study is to enhance knowledge in the field about the role of diversity, equity, and inclusion in education organizations by exploring the following questions:

1. **What are the racial and socioeconomic demographics of staff, leadership, and boards in education organizations?**

2. **What are the policies and practices that education organizations employ in relation to diversity, equity, and inclusion?**

3. **What are staff perceptions of diversity, equity, and inclusion in their organizations and of related practices and behaviors?**

4. **What are the perceived links between organizational diversity, equity, and inclusion and student success?**

This study includes data from more than 200 organizations on organizational demographics, policies, and structures and nearly 5,000 individual perspectives on lived staff experiences in relation to diversity, equity, and inclusion with an intentional focus on race and ethnicity. We define diversity, equity, and inclusion as follows:

- **Diversity as variation.** The presence of different types of people (from a wide range of identities and with different perspectives, experiences, etc.).

- **Equity.** The process of ensuring equally high outcomes for all and removing the predictability of success or failure that currently correlates with any social or cultural factor.

- **Inclusion.** The process of putting diversity into action by creating an environment of involvement, respect, and connection — where the richness of ideas, backgrounds, and perspectives are harnessed to create value.

Major findings on the first three research questions fall within the three themes described below:

THEME #1
Diversity is a differentiator.

Staff in education organizations are not racially/ethnically representative of the students they serve, and the most significant gaps in representation are at the most senior levels of organizations.

- **Finding #1** **Our field — especially at senior levels — is still not reflective of the students we serve.** White leaders and staff members are overrepresented while other racial/ethnic groups are underrepresented. Staff diversity varies by organization type, with charter schools as the most racially diverse organizations in the sample and organizations that focus on policy, advocacy, and research as the least diverse in the sample. *See Figure 1 and Figure 2.*

- **Finding #2** **Diverse leadership teams seek broader input and recruit with a focus on diversity, equity, and inclusion, which research shows informs better decision-making.** This also leads to higher percentages of staff members who identify as people of color and a deeper sense of belonging among those staff members. These staff members and leaders of color are more likely to recommend their organization to others in their network, creating a virtuous cycle in support of continued diversity and inclusion.

- **Finding #3** **Staff led by a CEO of the same race/ethnicity are more likely to perceive the organization as fair.** While perceptions of fairness in the workplace positively influence employee engagement, productivity, and retention, the absence of perceived fairness has negative effects, including an environment of distrust and higher absenteeism. This data is particularly significant when one considers that white staff members in our survey population are almost 20 times more likely to have a CEO who shares their racial background than are people of color.

THEME #2
Diversity, equity, AND inclusion are a necessary combination.

While the data shows important differences in the practices of organizations with greater diversity, a singular focus on diversity without a commensurate focus on equity and inclusion will not maximize the potential benefits. We see striking evidence that organizations that approach diversity, equity, and inclusion in parallel have the greatest likelihood of realizing the benefits, such as staff engagement and staff retention.

- **Finding #1** **Diversity, equity, and inclusion are mutually reinforcing.** Increased inclusion (moving right along the horizontal axis in Figure 4) is associated with increased equity (moving from light green to dark green to blue), and the majority of organizations with higher inclusion and equity also have greater demographic diversity (represented on the vertical axis). *See Figure 4.*

- **Finding #2** **Diversity, equity, and inclusion are strongly tied to staff retention, particularly for people of color.** Intent to stay (our proxy measure for retention) varies substantially according to organizational diversity and staff perceptions of equity and inclusion.

Staff members of all racial/ethnic backgrounds who experience their organizations as diverse, equitable, and inclusive report that they are more likely to remain with the organization three years into the future. This trend is even more pronounced for staff members of color. Discrimination (an active demonstration of exclusion) has a strong negative relationship to intent to stay, whether one witnessed or directly experienced the discrimination. *See Figure 5.*

- **Finding #3** **Staff members are more likely to promote and advocate for a diverse, equitable, and inclusive organization.** We created a promoter index comprised of a high score on intent to stay and/or willingness to recommend the organization to a friend. As compared to non-promoters, promoters are much more likely to rate their organization's compensation systems and career advancement opportunities as fair. Promoters perceive that staff members in their organizations reflect diversity of thought and perspective and that their organizations are inclusive. They are also more likely to report strong organizational communication and management commitment to making progress on diversity, equity, and inclusion.

THEME #3
Organizations have an opportunity to dramatically increase diversity, equity, and inclusion by employing promising practices.

Our data generated rich information about why organizations engage in diversity, equity, and inclusion work; what they focus on; and how they approach the work. Within each area, we gleaned information about common practices, the biggest gaps, and the relationships between practice and staff experience.

- **Finding #1** **A broad range of motivations for engaging in diversity, equity, and inclusion work is more powerful than any single motivation.** No single motivation for engaging in diversity, equity, and inclusion work is associated with the highest scores across the Staff Experience Survey, but organizations identifying more than three motivations are more likely to engage in practices to accelerate diversity, equity, and inclusion amid other pressing priorities.

- **Finding #2** **Organizations are underutilizing practices that advance diversity, equity, and inclusion.** While many organizations intend to become more diverse, inclusive, and equitable, fewer than half the organizations surveyed have basic diversity, equity, and inclusion policies, practices, and structures in place. There is no standard "recipe" for diversity, equity, and inclusion practices. The success of these practices is highly contextual, and it's important to focus on diversity, equity, and inclusion practices simultaneously rather than sequentially.

- **Finding #3** **Demonstrated management commitment is a strong lever for progress on diversity, equity, and inclusion.** Respondents who perceive that their organization's management's actions model a commitment to diversity, equity, and inclusion are more likely to perceive accountability for diversity, equity, and inclusion work, more likely to report DEI-focused talent practices (e.g., recruiting for diverse pools, removing hiring biases, offering equal opportunities for promotion), and more likely to experience effective communication. Staff who report higher levels of management commitment are also more likely to feel they can bring their "whole self to work" and that their organization actively works to eliminate exclusion.

- **Finding #4** **Effective, authentic communication is a critical ingredient for change.** Effective communication was more highly correlated with perceptions of equity and inclusion than any of the other diversity, equity, and inclusion practices. Staff also perceive that their organizations are more diverse if there is a culture of open communication. The trends related to communications effectiveness hold true at all levels in the organization. *See Figure 15 and Figure 16.*

- **Finding #5** **Data gaps at the field and organizational levels inhibit progress.** Organizations are not collecting many sources of diversity, equity, and inclusion data beyond candidate and staff race/ethnicity. Across the field, nothing is collected systematically, not even demographics, making it difficult to measure progress on diversity, equity, and inclusion or talent practices more generally.

To explore the fourth research question about the links between organizational diversity, equity, and inclusion and student outcomes, we asked organizational leaders to consider the most significant way that student outcomes are impacted when the organization is diverse, inclusive, and equitable. Leaders most frequently reported six lines of impact:

1. **Deep understanding of the students served**
2. **Increased cognitive diversity**
3. **Foundation to develop trusting relationships**
4. **Diversity of leaders and teachers**
5. **Greater staff engagement**
6. **Ability to see the path toward equity**

We combined our research team's decades of relevant collective experience with our analysis of the findings from all of the study's survey data to identify additional insights extending from the research. Three themes stood out:

- **Inclusion, not assimilation.** It is important that organizations not mistake assimilation for inclusion. An inclusive workplace culture is characterized by the full integration of a diverse set of staff members into an organization with a climate of respect and positive recognition of differences. In contrast, organizational cultures that require assimilation open their doors to people of color without shifting away from white dominant culture, policies, norms, decision-making, communication, or power structures. These environments can be taxing for people of color, who may spend precious cognitive and emotional energy assimilating. Our data demonstrates that increasing diversity while still requiring assimilation into a white dominant culture does not achieve the organizational benefits of diversity.

- **Shifting power dynamics.** Fundamentally, equity relates to shifting traditional power dynamics. The data suggests that creating a diverse, equitable, and inclusive environment is less about which set of technical activities an organization chooses and the sequence in which they are pursued, and more about whether the leaders of an organization are fundamentally willing to acknowledge, question, and eventually share and/or relinquish

power. One more dimension connected to power shifting relates to communication practices. This relies on organizational leaders' willingness and ability to create an environment where it is safe for multiple stakeholders to give input regardless of role authority. It is also critical that leaders encourage staff to interrupt moments of racism, name power dynamics explicitly, and call sacred organizational practices into question.

● **Critical roles for leaders.** Diverse, equitable, and inclusive organizations create a culture where leaders model a commitment to diversity, equity, and inclusion values and communicate effectively. In our experience, modeling means leaders are developing multicultural competence and demonstrating the vulnerability that comes with that work.

Organizational Profiles

After reviewing our survey data, we identified clusters of organizations with similar diversity, equity, and inclusion scores and grouped them into four basic organizational profiles to help leaders understand their starting point:

PROFILE		Diversity	Inclusion	Equity
	Early Stage	Low	Low	Low
	Diversified	High	Low	Low
	Kindred	Low	High	High
	Advanced	High	High	High

We then looked at the relationships between each of these profiles and the promoter index. Figure 18 on page 63 illustrates how the combination of diversity, equity, and inclusion enables these four types of organizations to capture the multiple benefits described in the study. When organizations make advancements in inclusion they see dramatic improvements in the promoter index and staff members' intent to stay.

Finally, by examining the relative strengths of other organizations that emerged through our study, we surfaced recommendations and high-level promising practices to help organizations accelerate progress on several or all dimensions of diversity, equity, and inclusion.

Our strong hope is that this study inspires our colleagues within education organizations of all types to commit to diversity, equity, and inclusion as a **source of unrealized impact and an organizational imperative**. It is time to accelerate our collective progress by shifting to action; improving our sector's ability to attract and retain diverse talent; and moving forward with the conviction that diversity, equity, and inclusion are essential ingredients to achieve educational equity and excellence for all students.

The findings, organizational profiles, and recommendations are explored in detail in the full report, which begins on the following pages.

INTRODUCTION

The case for diversity, equity, and inclusion

There are countless benefits to diversity across sectors: Diverse teams are more innovative and make better decisions, and diverse companies have better shareholder returns.[2] Diverse organizations are also well positioned to attract new talent: In a recent survey of job seekers, two-thirds cite diversity as an important factor in their choice of a new organization. For people of color, that number is even higher: 70 percent of Latinx[3], 80 percent of Asian, and 89 percent of Black job seekers prioritize a diverse workplace[4] Millennials, who will compose one-third of the U.S. labor force by 2024, place an even higher value on diversity and inclusion than previous generations.[5] When organizations are diverse, equitable, and inclusive, they also have higher levels of satisfaction and engagement, stronger staff retention, higher productivity, and a heightened sense of belonging.[6]

When diversity is a focus in education, there are benefits to those who are served. Black and Latinx students taught by teachers who share their racial backgrounds benefit from a culture of higher expectations, fewer discipline referrals, and improved academic outcomes.[7]

If research and lived experience point to the myriad benefits of diversity, equity, and inclusion (DEI), why then do so many organizations struggle to make this a reality? In a global survey of companies, the vast majority reported feeling a sense of urgency to address diversity and inclusion, yet only one in five reported that they feel prepared to do so.[8] In a study of nonprofits, nine of ten organizations reported a high value for diversity, but seven in ten reported that they are not doing enough to create a diverse and inclusive environment.[9]

The gap between intention and action is a common challenge.[10] To resolve it, we must first better understand how organizations operationalize and foster diversity, equity, and inclusion, and the degree to which their efforts are making a difference.

If research and lived experience point to the myriad benefits of diversity, equity, and inclusion, why then do so many organizations struggle to make this a reality?

A focus on a critical dimension of diversity: race and ethnicity

While there are many dimensions of diversity that are salient to an individual's identity and to an employee's experience, our focus in this study is on the dimensions of race and ethnicity as they play out within organizations. Race is a social construct, but one that impacts all of our experiences. Systemic inequities, from health outcomes to treatment in the criminal justice system to economic opportunity, are persistently based on race. Over-reliance on racial diversity as a proxy for diversity of background or perspective is an oversimplification with inherent risks. At the same time, as this study demonstrates, approaching diversity with colorblindness fails to acknowledge the varied experiences that individuals have based on their racial/ethnic identities. Race is a critical, if imperfect, lens to analyze and address the structural and institutional inequities that exist in education.

A focus on race/ethnicity inside education organizations is an important lever for addressing systemic inequities in everything from classroom curriculum and pedagogy to school discipline and culture, community engagement, and teacher and leader recruitment and retention. However, the need for racial equity extends far beyond education. The Black Lives Matter movement, the rights and treatment of immigrants, protests amidst the pipeline construction at Standing Rock, police shootings, and countless other examples point to the need to remain focused on racial equity in our country.

Discussions of race and racism are inherently charged and politicized given our nation's history. Conversations are often polarized and lack nuance and empathy, preventing people with different perspectives from forging common ground. Individuals also go to great lengths to avoid the discomfort of direct conversations about race. Opportunities to engage in thoughtful dialogue with trusted relationships across racial (and political, economic, or religious) lines are rare. In a recent study, 75 percent of white Americans report that the social network with whom they discuss important matters is entirely white. Sixty-four percent of Black Americans have a homogeneous social network solely comprising other Black people, and 46 percent of Latinx Americans report a racially homogeneous social network.[11]

In education, we've seen the role of race debated by leaders across the political spectrum with different interpretations of the problem we seek to solve. Some hold the perspective that systemic racism underlies the inequities we see in our school system and that to achieve equitable results, we must dismantle racism. Others argue that focused attention on race detracts from the fact that the public school system is not serving the vast majority of students well and that a race-conscious framing can widen existing divides and lead us to overlook other

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communities in need. Education leaders are genuinely grappling with different beliefs and perspectives about how central race should be to conversations about school improvement.[12] We encourage readers to engage with this research and use it as a jumping-off point for thoughtful debate and discussion in service of improving education for all students.

Data gaps inhibit progress

A broad range of education organizations have begun to ask powerful questions to accelerate progress on diversity, equity, and inclusion in service of better outcomes for students. These include:

- How diverse are we as an organization? As a sector?

- What do diversity, equity, and inclusion mean to us and to what degree do these issues matter in the context of our mission?

- How do we know whether focusing on increasing our diversity, equity, and inclusion will positively impact students and their academic outcomes?

- If we are a predominantly white organization working to increase our diversity, equity, and inclusion, what do we need to do to better attract, support, and sustain a diverse group of staff and engage broader stakeholder input? If we are an organization that is already diverse, what do we need to do to ensure that we are inclusive and equitable, and how do we sustain that over time?

As these questions surface, we lack education sector data to provide insight into organizational practices and outcomes related to diversity, equity, and inclusion. Organizations are working through trial and error rather than a solid base of evidence. In individual organizations and as a field, we are failing to track data. We have data gaps in understanding the practices that organizations undertake, the outcomes of those efforts, and the connection between those efforts and student outcomes. Without more robust data to illustrate these connections, we are less likely to act responsively, hold one another accountable, and ultimately, foster more sustained mission effectiveness.

For some audiences, the very notion of making a data-based case to focus on advancing diversity, inclusion, and equity in education organizations fails to acknowledge real experiences of marginalization, bias, and discrimination that people of color encounter every day. The purpose of collecting field-level data is not to suggest that these individual experiences are not valid in and of themselves. Rather, we recognize that data, in the aggregate, is an important tool to inform actions to drive change and that in our data-driven education sector, many leaders are struggling to prioritize work on diversity, equity, and inclusion, or to get this work funded, without data to support the case.

We lack education sector data to provide insight into organizational practices and outcomes related to diversity, equity, and inclusion.

How this report is structured

This study serves as an initial step to explore, inform, and enhance knowledge in the field about the role of diversity, equity, and inclusion in education organizations. With data from more than 200 organizations and nearly 5,000 individual perspectives, this study serves as an important opportunity to grow our collective understanding of the practices organizations employ and how staff members experience those practices.

This report offers recommendations and analyses focused on organizations at different places in their journey to become diverse, equitable, and inclusive or to sustain those characteristics.

The body of the report is organized into five sections:

1. Our research methodology
2. Our findings, which are drawn from an analysis of survey responses
3. Additional insights and implications of those findings
4. Definitions of four concrete Organizational Profiles, or types, that we created based on the findings
5. Our broader recommendations to chart the path forward

Direct quotes from survey responses are included as "Participant Insights." *Indicated by:*

We also include appendices to further explain a.) our methods and b.) additional strategies and pitfalls when advancing organizational diversity, equity, and inclusion.

It is our hope that this report will spark productive conversations between individuals with a wide range of perspectives and result in bold action to accelerate progress toward more diverse, inclusive, and equitable organizations for adults in order to maximize impact for students.

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USE OF LANGUAGE

The impact of language to convey, maintain, and exert power is often underestimated. In fact, language shapes perceptions of competence and confidence, as well as who is heard and seen and who gets credit. Whether by design or not, language choice can have the impact of marginalizing others or signaling belonging. As such, we are intentional in our language usage in this report and want to make transparent the rationale for some of our language choices.

Definitions of diversity, equity, and inclusion

Throughout this report, we use each of the terms — diversity, equity, and inclusion — intentionally. In many places we use all three terms because we recognize the important difference between these concepts and do not believe that a shorthand adequately covers these differences.

This study focuses on diversity in terms of racial and economic background. The racial/ethnic makeup of our nation's public schools has shifted from majority white to majority children of color, and our nation's schools predominantly serve students from low-income backgrounds.[13] Further, the academic achievement gap most impacts students of color and students growing up in poverty.[14]

While the other primary intention of this study was to explore diversity in terms of socioeconomic background, we found that fewer than 10 percent of organizations collect this data, thus limiting meaningful conclusions and insights. We hypothesize that socioeconomic background and its intersection with race have meaningful implications for staff experiences, and we encourage more organizations to collect data on this dimension of diversity to enable future research.

At the outset of this project, we defined the concepts of diversity, equity, and inclusion based on the combination of references cited below and the collective expertise of the advisory panel, working group, and project team:

- **Diversity as variation.** The presence of different types of people (from a wide range of different identities and with different perspectives, experiences, etc.).[15] An example of diversity in this sense would be an organization having a high degree of variation in racial and ethnic representation among staff.

Language shapes perceptions of competence and confidence, as well as who is heard and seen and who gets credit.

- **Equity.** The process of ensuring equally high outcomes for all and removing the predictability of success or failure that currently correlates with any social or cultural factor.[16] An example of equity in an organizational context would be having a clear compensation structure that promotes equitable pay.

- **Inclusion.** The process of putting diversity into action by creating an environment of involvement, respect, and connection — where the richness of ideas, backgrounds, and perspectives are harnessed to create value.[17] An example of this type of inclusion would be regularly engaging a diverse group of staff in decision-making.

Other terms

Throughout this report we use the word **Black** versus African American because we recognize the important distinctions in these terms. While the term Black is inclusive of the entire African diaspora, i.e., all African-descended people settling in dozens of countries, from Canada to Cuba to Brazil, the term **African American** refers primarily to descendants from slavery in the United States.[18]

We have also made an intentional choice to use the term **Latinx** versus Latina/o because we believe it to be the most inclusive language option. While the term Latina/o is inclusive of both males and females, this language excludes people who identify as Latin American descendants and gender non-binary, i.e., neither exclusively male nor exclusively female. The term Latinx provides a single gender-neutral alternative.[19]

Organizational culture is the collective behavior of an organization's members and the meaning attached to that behavior.[20] We use the term **white dominant culture** to refer to the norms, values, beliefs, ways of thinking, behaving, and decision-making that are more familiar to and come more naturally to those from a white, Western tradition. These white dominant cultural norms are embedded and often unintentionally reproduced in our national culture and many education sector organizations. An example includes valuing the written word over other methods of communication as more "professional," "effective," "good," or "normal."[21]

In this context, **code-switching** refers to the act of changing the way one speaks or acts to conform to the way others communicate. Specifically, in this report, code-switching refers to staff of color consciously or unconsciously shifting their behavior accommodate white dominant cultural norms.[22]

Finally, we use the term **privilege** to refer to having access to an unearned set of possessions, conditions, rights, or immunities of value, enjoyed by some while others do not have access due to an aspect of identity.[23]

METHODS
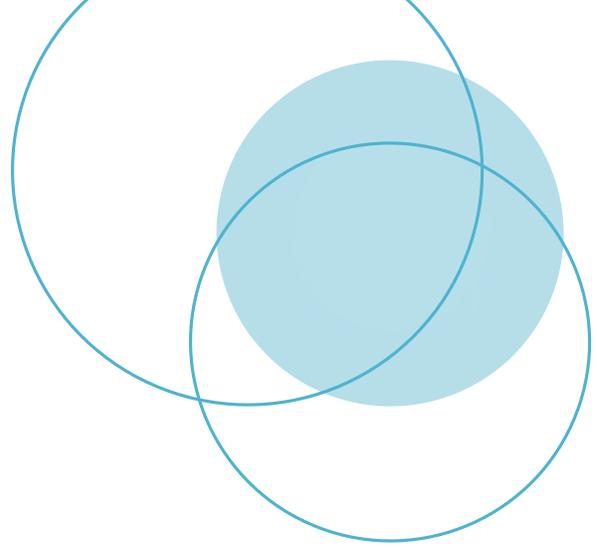
The study set out to explore the following research questions:

1 **What are the racial and socioeconomic demographics of staff, leadership, and boards in education organizations?**

2 **What are the policies and practices that education organizations employ in relation to diversity, equity, and inclusion?**

3 **What are staff perceptions of diversity, equity, and inclusion in their organizations and of related practices and behaviors?**

4 **What are the perceived links between organizational diversity, equity, and inclusion and student success?**

The study reflects data from two primary surveys, with over 200 organizational and nearly 5,000 individual responses. The survey instruments, administered between November 2016 and March 2017, were informed by a thorough review of previous research on DEI and organizational effectiveness from education and from other sectors. Given the study's objective to explore organizational practice and staff experience, the two surveys targeted different areas of focus:

- The **Organizational Profile Survey** collected data on organizational demographics and diversity, equity, and inclusion practices. One respondent (typically a senior leader) submitted this survey on behalf of the participating organization. We invited leaders of over **2,000** organizations to participate in the survey, using multiple distribution channels, and we received **213** responses, primarily during November and December 2016. This represents slightly over a 10 percent response rate.

- The **Staff Experience Survey** collected staff perceptions of the effectiveness of diversity, equity, and inclusion efforts. Organizations that participated in the Organizational Profile Survey had the option to participate in the Staff Experience Survey. For this survey, we received **4,912** responses from staff members across **71** organizations between December 2016 and March 2017. Survey respondents spanned racial/ethnic backgrounds and were diverse across many lines of difference. All staff responses were anonymous. Organizations received summary reports aggregating the responses from their staff members.

In addition to these survey instruments, we used an exploratory approach to consider the fourth primary research question: the perceived connections between diversity, equity, and inclusion in organizations and student outcomes. Through this approach we collected and analyzed responses from senior organizational staff to the question of how increased diversity, equity, and inclusion links with improved student outcomes. Adapted from the Most Significant Change methodology, this analytic technique draws on field-level inputs and domain experts to identify the most significant areas of impact between two variables.[24] We invited approximately **1,500** leaders (drawing on the Organizational Profile Survey invitee lists) to provide input, and received written responses from approximately **100** leaders during April 2017.

We approached this study with a perspective informed by the authors' and contributors' collective decades of experience working on organizational dynamics, enhancing talent effectiveness, and successfully navigating complex change processes. The authors hypothesized that diverse, equitable, and inclusive organizations are better able to support and retain adult staff so that they can thrive professionally and create more durable, authentic, and sustainable relationships with parents and community members. The authors also hypothesized that diverse, equitable, and inclusive organizations maximize student outcomes. **This report focuses primarily on that connection between diversity, equity, and inclusion and internal organizational health and effectiveness. The report also presents preliminary evidence (in Sidebar 2 on page 51) that supports the perceived links between organizational diversity, equity, and inclusion and student success.**

The surveys targeted a wide range of organization types within the education sector: public and private schools; school districts and charter management organizations (CMOs); education support organizations, which are typically nonprofits; organizations that sell education-related products and services, including education technology firms; policy and research organizations; a variety of funders and investors; and others. To reach these organizations, we compiled a list of organization leaders from a variety of sources: directories of public school organizations, sector newsletter distribution lists, education conference attendee lists, grantee lists from our funding partners, and the clients and personal contacts of project staff. The survey designers do not believe that these lists reflect any implicit bias with respect to particular views or priorities on topics covered in the surveys.

That said, it is important to note that respondents do not constitute a representative sample of the education field. When we compared our survey findings with publicly available data about the education sector we identified three primary ways in which our respondents vary from

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the broader education field. Traditional public schools and districts are underrepresented in the sample. The few school districts in our sample indicated that they were not able to meet the time constraints for administering the Staff Experience Survey and did not participate. Our sample is also underrepresented by organizations located in the South and Midwest (as opposed to the West and Northeast). There may be regional nuances to perspectives on diversity, equity, and inclusion efforts in organizations located in the South and the Midwest that our study does not capture. Our sample is also composed of a lower ratio of white respondents than is true of the field at large. As such, we anticipate bolstering efforts to capture full representation across organization types and locations in future studies.

It's important to remember that any self-response survey, even one as large as this, can be subject to response bias. Respondents may be more inclined to complete, or not complete, a survey or particular questions based on a variety of attributes that would bear on the results but are challenging to anticipate, and therefore control for, in our analyses. Although the authors believe these findings are relevant and a significant contribution to the knowledge base, they do not represent a random sample of our targeted population. Rather, they represent the views and experiences of the people and organizations that elected to participate in the survey.

Still, the combination of two distinct surveys and our analysis of over 3,000 responses to open-ended questions introduces a multidimensionality to diversity, equity, and inclusion research not yet seen in the education field at this scale. We now have descriptive data about organizational practices, policies, and structures and a greater understanding of how staff members experience those practices. In this way, we are able to understand how dimensions of staff members' identities impact their perceptions and experience of an organization's work.

For more detailed information about the study design and methodology, please refer to Appendix A on page 75.

FINDINGS
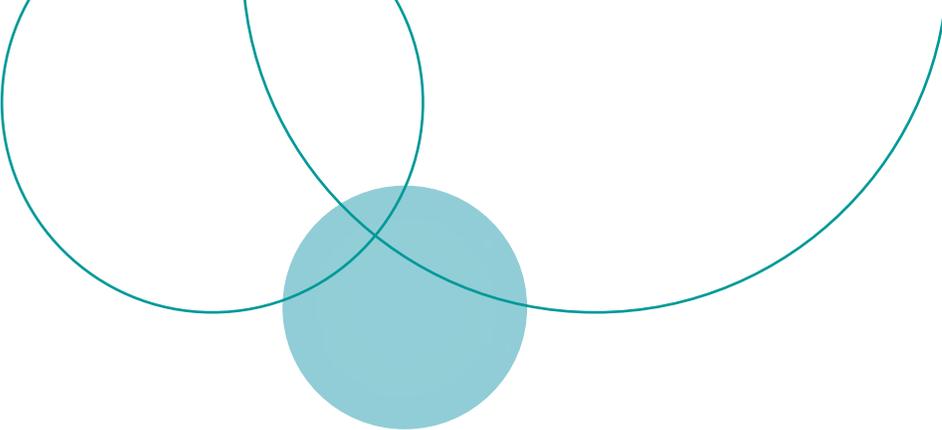
This study set out to understand the connections between the racial and socioeconomic[25] demographics of staff in education organizations; the policies and practices that organizations employ in relation to diversity, equity, and inclusion; and staff perceptions of those practices based on their experiences.

We group our 11 main findings into three overarching themes: The first theme focuses on racial/ethnic diversity and the distinctive characteristics of organizations with greater diversity in their leadership ranks. The second focuses on the intersection of diversity, equity, and inclusion and the benefits derived from an integrated focus on all three areas. And the third theme studies the practices that organizations currently employ to advance diversity, equity, and inclusion. Direct quotes from survey respondents are included throughout the findings.

In addition to the 11 main findings, the study also utilized a research approach to explore the link that represents the ultimate goal of this work, between organizational DEI and student outcomes. This topic is explored in Sidebar 2 on page 51.

We also used our findings to delineate four types of organizations, which we call Organizational Profiles — these appear as a separate section that immediately follows the Insights and Implications section. These profiles are intended to help organizations understand their starting point in relation to diversity, equity, and inclusion and define a tailored path forward to advance progress.

THEME #1
Diversity is a differentiator.

Staff in education organizations are not racially/ethnically representative of the students they serve, and the most significant gaps in representation are at the most senior levels of organizations. This lack of diversity has a meaningful impact on the practices employed by organizations. Another meaningful difference in the data is that perceptions of fairness, a key link to staff engagement and retention, vary based on the race of the CEO and the staff member. This theme explores each of the following findings in more depth:

- **Finding #1** Our field — especially at senior levels — is still not reflective of the students we serve.

- **Finding #2** Diverse leadership teams seek broader input and recruit with a focus on diversity, equity, and inclusion.

- **Finding #3** Staff led by a CEO of the same race/ethnicity are more likely to perceive the organization as fair.

## Finding #1 Our field — especially at senior levels — is still not reflective of the students we serve.

White leaders and staff members are overrepresented, both in the education field generally and in organizations in this sample. Nationally, according to data from the Bureau of Labor Statistics, most recently compiled in 2014, 83 percent of the individuals employed across all roles in the education sector are white, whereas the student population is 50 percent white.[26] Schools in this sample serve an even higher percentage of students of color. White students make up only 24 percent of the population of students served. At the same time, 49 percent of the staff members in our sample are white. At the leadership team level, it rises to 64 percent, and 74 percent of chief executives are white.

In contrast, other racial/ethnic groups are underrepresented, particularly in leadership positions. The percent of Black CEOs is 9 percent while Black students represent 21 percent of our sample. Fewer than 8 percent of CEOs and executive team members identify as Latinx, while Latinx students compose 40 percent of the student population served by the organizations surveyed. Board demographics reveal a similar pattern, with the most pronounced gap in the Latinx population, where only 7 percent of board members are Latinx.

Staff in education organizations are not racially/ethnically representative of the students they serve, and the most significant gaps in representation are at the most senior levels of organizations.

FIGURE 1 | Race/Ethnicity by Level, All Organizations

CEO
0% | 6% | 9% | 8% | 2% | 74%

Board
1% | 5% | 18% | 7% | 1% | 68%

Executive team
1% | 8% | 16% | 8% | 3% | 64%

Staff
0% | 7% | 16% | 25% | 2% | 49%

Students
1% | 8% | 21% | 40% | 6% | 24%

0%   100%

● Native American   ● Black or African American   ● Multiple or Other
● Asian or Pacific Islander   ● Latinx or Hispanic   ● White
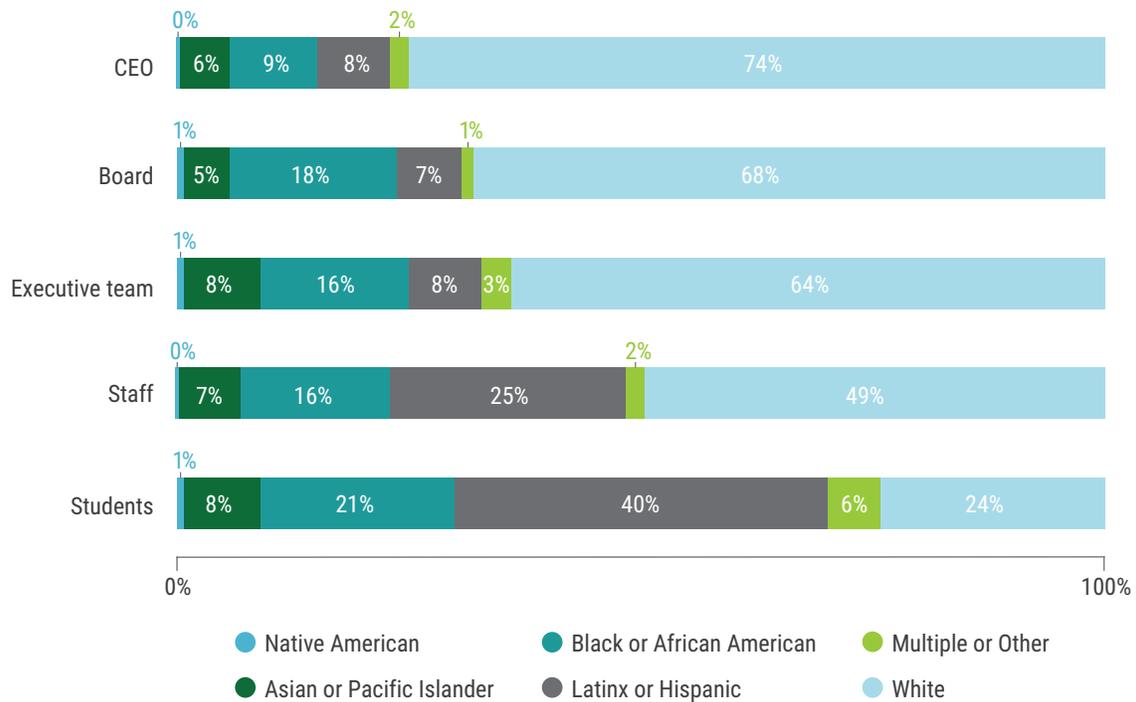
Source: Organization Profile Survey

Staff diversity also varies by organization type. Within leadership teams, 39 percent of charter school leadership identify as people of color, and the number drops to 35 percent in nonprofits and to only 26 percent in foundations. Among CEOs, the mismatch is particularly pronounced for funders and nonprofits, where nearly 80 percent are white. Organizations in the sample that focus primarily on policy, advocacy, and research are the least diverse at the leadership level. Of these, 100 percent of the CEOs are white, 100 percent of the organizations have majority-white leadership teams, and two-thirds have all-white executive teams. Among funder and education product and service organizations, 75 percent of board members are white whereas 66 percent of charter school board members and education support organizations in the sample are white.

Within leadership teams, 39 percent of charter school leadership identify as people of color, and the number drops to 35 percent in nonprofits and to only 26 percent in foundations.

FIGURE 2 | Executive Team Race/Ethnicity by Organization Type

Organization Type	Native American	Asian or Pacific Islander	Black or African American	Latinx or Hispanic	Multiple or Other	White
Education Products and Services	0%	12%	6%	4%	3%	74%
Funder, Donor, or Investor	0%	6%	9%	9%	1%	74%
Education Support Organization	0%	6%	18%	8%	3%	65%
CMO/ Charter School	3%	9%	16%	8%	3%	61%

Legend:
- Native American
- Asian or Pacific Islander
- Black or African American
- Latinx or Hispanic
- Multiple or Other
- White

Source: Organization Profile Survey

While diversity in the sector is far from reflecting the student population, some organizations do have greater diversity at the leadership and staff levels. The most diverse organizations in the sample have more than 55 percent people of color on their leadership teams. In this top quartile of organizations, more than 64 percent of their staff members identify as people of color. The least diverse, or bottom quartile, of organizations in the sample have fewer than 15 percent people of color on their leadership team and fewer than 24 percent of their staff members identify as people of color.

PARTICIPANT INSIGHTS

"Our belief is that we address diversity, equity, and inclusion best by hiring a diverse leadership staff. From there, hiring a diverse staff comes easier as we have 70 percent people of color."

"I see a diverse workforce there [in junior staff positions] and don't feel like there is discrimination in terms of hiring, compensation [within] in those ranks. I am concerned about the lack of racial diversity in the leadership of the organization."

"[DEI] is in everything we do all day every day. From having a Latina CEO to a very diverse staff, it's ingrained in us to do DEI work in everything and anything that we do. It's not a one-off training but what we live and breathe every day because of who we are and our backgrounds and upbringing."

Finding #2 Diverse leadership teams seek broader input
and recruit with a focus on diversity, equity, and inclusion.

In terms of organizational policies and practices, one of the most
pronounced differences between more and less racially diverse
leadership teams is the degree to which an organization solicits input
from a wide range of stakeholders in decision-making. Organizations that
have higher executive team diversity create more avenues for input from
multiple stakeholders (see Figure 3 below).

FIGURE 3 | Processes for Diverse Input in Organizations with More and Less Leadership Team Diversity

Processes for Input

- Collect parent input — 47% / 26%
- Include interviewers from underrepresented group in recruiting — 53% / 40%
- Collect student input — 51% / 21%
- Include community board members — 58% / 43%
- Involve the community in internal DEI efforts — 53% / 34%
- Create a process for diverse input into decision-making — 50% / 32%

0%   30%   60%

Percentage Responding "Yes"

● More diverse leadership teams and/or CEO of color*   ● Less diverse leadership teams

* Defined as organizations with higher-than-average leadership team diversity when compared to
the study sample (% of people of color on leadership team) and/or a CEO who identifies as a person of color.

Source: Organization Profile Survey

Avenues for input are important to organizational effectiveness for a
number of reasons. Research demonstrates that organizations with
effective channels for stakeholder input offer greater transparency into
decision-making, higher levels of ownership for decisions, and increased
knowledge exchange.[27] Ultimately these organizations make better

decisions. In education, research on relational trust demonstrates that quality avenues for input and engagement build accountability for shared standards and give educators more confidence to take risks in service of school improvement.[28] The growing field of user-centered design also demonstrates the benefit of designing solutions with direct input from the end-user.[29]

Organizations led by people of color have higher percentages of staff members who identify as people of color as compared to organizations with less leadership team diversity (62 percent versus 37 percent).

Organizations with greater leadership team diversity in the study are also associated with significantly higher levels of focus on diversity, equity, and inclusion in their recruiting practices. These organizations are at least 50 percent more likely than organizations with less racially diverse leadership teams to enable job candidates to meet with people from their identity groups and to yield a diverse group of new hires.

These practices increase the likelihood of diversifying hires, in part by enabling candidates to meet with staff members from their identity groups.[30] In addition, prospective hires can see themselves belonging and advancing in the organization. This can create a virtuous cycle where higher levels of staff diversity impact staff diversity. In addition, expanding the pipeline of people of color through networking compounds the positive effect.

> *Organizations led by people of color have higher percentages of staff members who identify as people of color as compared to organizations with less leadership team diversity.*

PARTICIPANT INSIGHTS

"From our [board of directors], to our team, to our Family Advisory Council, we live and breathe to ensure people of different backgrounds have decision-making power in [our organization] and [can] create their own agendas for how they want to create change in the education system."

"When you have [diversity at all levels of the organization], there is simply no way any decision gets made without input from people with different backgrounds. We don't have to create special structures to make this happen."

"We have folks on our team who represent the backgrounds [of students and families] that our organization serves. This brings an invaluable perspective to problem-solving and setting strategy."

"Overall, {organization} makes a great effort to be a diverse, inclusive school. However, in my opinion, this effort has failed because the organization truly looks for one type of teacher with one style of teaching and one perspective of student success."

"There is no clear path for outreach directors (where most people of color work in the organization) to transition into leadership or roles outside outreach. I think probably half or better of our employees [do not] have a great connection to the populations we work with."

Finding #3 Staff led by a CEO of the same race/ethnicity are more likely to perceive the organization as fair.

Perceptions of fairness in the workplace influence employee engagement, productivity, and retention.[31] In a recent study, employees' experiences of fairness correlated with their physical and mental health.[32] The absence of perceived fairness negatively impacts workplace culture by creating an environment of distrust, higher absenteeism, and increased labor union complaints. In our study, whether the race/ethnicity of the CEO is the same or different from the respondent's influences select staff ratings of the fairness of talent practices:

- White respondents are 36 percent more likely to perceive promotion opportunities as fair when their CEO identifies as white (versus as a person of color).

- Respondents who identify as Black or Latinx are 19 percent more likely to perceive promotion opportunities as fair when their CEO shares their racial/ethnic background. In addition, they give more favorable ratings to compensation systems (+23 percent) and openness of communications (+29 percent).

- Respondents with a CEO of the same race/ethnicity are more likely to be "promoters," a term to describe those who plan to stay in the organization for at least three years and/or who are highly likely to recommend a friend to work in the organization. The effect is particularly strong among Latinx staff — 88 percent of Latinx staff with a Latinx CEO are promoters — and for Black staff, this number is 75 percent.

- Respondents with a CEO of a different race/ethnicity are less likely to be organizational promoters. The lowest scores are for Black staff with a white CEO (62 percent) and white staff with a Black CEO (61 percent).

This data takes on new meaning when one considers the large percentage of CEOs who are white. A white staff member in our survey population is almost 20 times more likely than a person of color to have a CEO that shares his/ her racial background.

One experience of fairness is around opportunities for advancement and promotion, and we find that an employee's perception of the fairness of promotion opportunities varies by race/ethnicity and by gender. While we did not set out to study gender explicitly, we did collect data on a number of dimensions of diversity and we discovered some interesting findings at the intersection of race and gender. One of those relates to perception of advancement. The largest difference in experience of any of the racial/ethnic groups by gender exists between Black females and white males. In

An employee's perception of the fairness of promotion opportunities varies by race/ethnicity and by gender.

our Staff Experience Survey, when asked the degree to which an employee agrees with the statement "I see a diverse group of employees advancing," 42 percent of Black females answered in the affirmative in comparison to 58 percent of white males. Perceptions of advancement opportunities highlight an important area of focus for managers, especially considering the lower representation of people of color in management positions.

PARTICIPANT INSIGHTS

"While we look diverse, we are not retaining people of color on our team or making sure they advance in the same leadership opportunities."

"I think our organization is doing a great job of diversity, but my concerns are with equity. As a manager, I have found opportunities to empower my staff and provide opportunities for advancement that received significant pushback from management."

THEME #2
Diversity, equity, AND inclusion are a necessary combination.

While the data shows important differences in the practices of organizations with greater diversity, a singular focus on diversity without a commensurate focus on equity and inclusion will not maximize the potential benefits. Organizations that focus on hiring a more diverse staff without fostering an inclusive and equitable environment can experience a revolving door effect, which is costly in terms of resources, institutional memory, and organizational culture. In addition, high turnover of people of color runs the risk of reinforcing biases and deficit-based assumptions about the capabilities of staff members of color rather than challenging organizations to create equitable and inclusive environments for all.[33]

We used a subset of Staff Experience Survey questions to create an Equity Index and an Inclusion Index (see Sidebar 1 below), which allowed us to view how organizations with high versus low staff ratings on equity and inclusion differed on various organizational practices. We saw striking evidence that organizations that approach diversity, equity, and inclusion in parallel have the greatest likelihood of realizing the benefits, such as staff engagement and staff retention.

A singular focus on diversity without a commensurate focus on equity and inclusion will not maximize the potential benefits.

SIDEBAR 1 | *Equity and Inclusion Indices*

Inclusion Index

Several Staff Experience Survey questions assess inclusive culture; we consulted our panel of experts to select the items and then combined them into an index.[34] We rate an organization's inclusivity based on the simple average of their Inclusion Index scores by staff with at least one historically marginalized identity (i.e., person of color, low socioeconomic background, LGBTQ). Overall, this includes 65 percent of the survey respondents. The questions included in the index were:

○ Our culture respects individuals and values differences

○ Our leadership team communicates well with the organization

○ We have frequent conversations about race/ethnicity

○ We have frequent conversations about power and privilege

○ We have free and open expression of ideas, opinions, and beliefs

○ Our organization recognizes and eliminates exclusion

○ I would recommend a friend from a marginalized background

○ Our organization has an explicit commitment to inclusion

○ Our organization tries to remove bias in our hiring process

○ Our onboarding process signaled to me that we are inclusive

○ I know someone who would reliably address discrimination

○ I am given the opportunity to contribute meaningfully in meetings

○ I can bring my "whole self" to work

Equity Index

Because most organizations we surveyed do not track equity of outcomes by race/ethnicity or socioeconomic background, we combined responses to several Staff Experience Survey questions about perceived equity into an index, similar to the Inclusion Index described earlier. Like the inclusion index, the equity index is calculated based on the perceptions of the 65 percent of respondents who identify with at least one historically marginalized identity (i.e., person of color, low socioeconomic background, LGBTQ).

○ Our organization has an explicit commitment to equity

○ Recruiting efforts are designed to yield a diverse group of candidates

○ Career advancement is equally accessible for all

○ Our compensation systems are implemented fairly

○ I see a diverse group of employees advancing
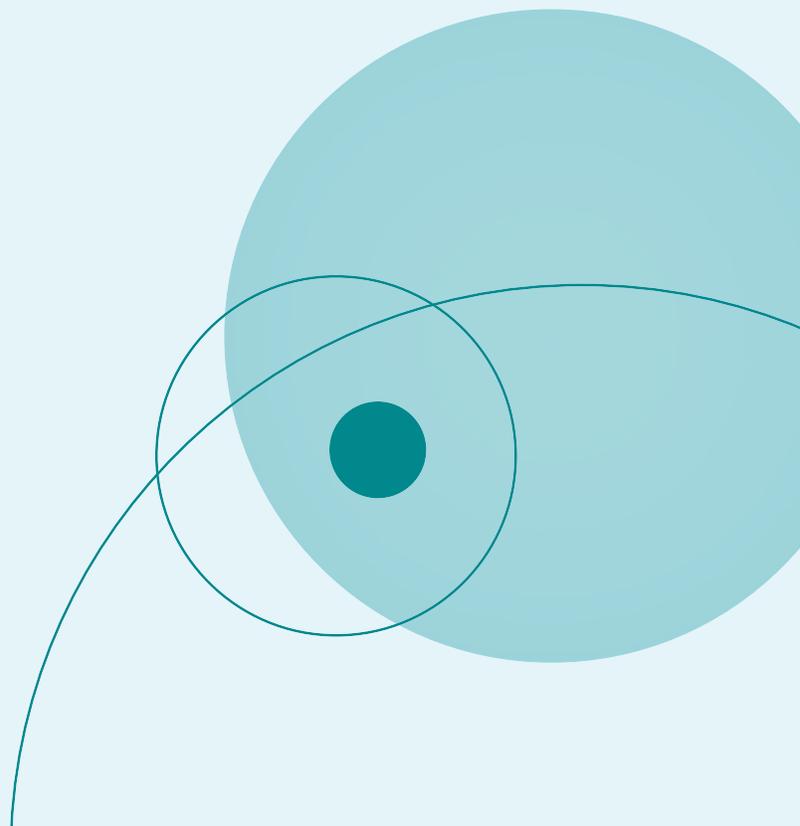
- **Finding #1** Diversity, equity, and inclusion are mutually reinforcing.

- **Finding #2** Diversity, equity, and inclusion are strongly tied to staff retention, particularly for people of color.

- **Finding #3** Staff members are more likely to promote a diverse, equitable, and inclusive organization.

Finding #1 Diversity, equity, and inclusion are mutually reinforcing.

Increased inclusion is associated with increased equity, and the majority of organizations that rate higher on the equity and inclusion indices also have greater representation of people of color (greater than one-third) on the leadership team. While most people in education are aware of demographic gaps in the sector, many organizations lack data to reveal their equity and inclusion gaps and, as a result, are less likely to understand the critical interrelationship among the three elements.

Figure 4 demonstrates the strong relationships in our data between diversity, equity, and inclusion:

FIGURE 4 | Relationship Between Diversity, Equity, and Inclusion
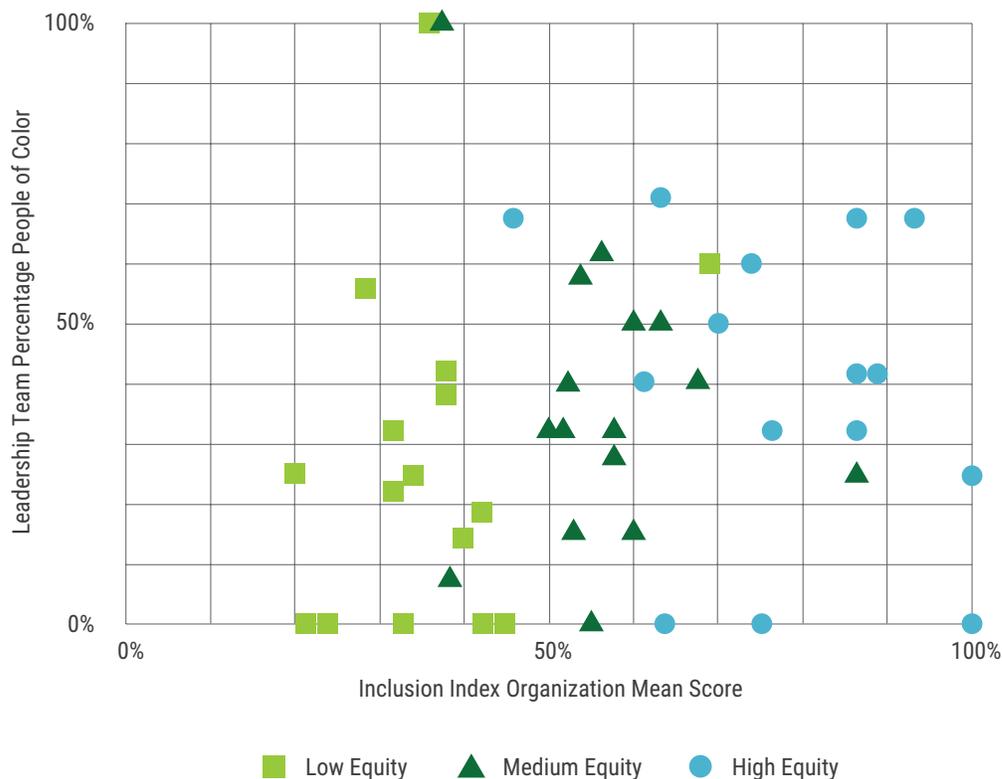
Source: Organization Profile Survey and Staff Experience Survey

The organization's level of inclusion is shown along the horizontal axis. The racial/ethnic diversity of the leadership team is measured along the vertical axis. The organization's equity ratings are displayed by the color of the points in three equal groups using a green-aqua-blue scale. The color of the dots turns progressively blue as inclusion increases. This suggests a relationship between equity and inclusion. The data demonstrates that an organization which focuses exclusively on one aspect of diversity, equity, and inclusion is missing an opportunity for greater impact.

The associations between diversity and the combination of inclusion and equity suggest a more nuanced story. Organizations in the top third of the inclusion and equity indices generally reflect greater leadership team diversity than organizations in the bottom third of the indices. As we'll explore in the section on organizational profiles later in the paper, organizations can be less racially diverse and experience high inclusion. We call these "kindred" organizations. The green point in the bottom right quadrant is an example of this type of organization. If an organization has a homogeneous, white leadership team, the staff members (of whom the vast majority are typically white in this profile) can experience a strong sense of belonging and equity within that organization's culture. See page 62 for more information on the organizational profiles that emerged from the data.

PARTICIPANT INSIGHTS

"I think that we have a big focus on diversity because it is easier to do than actually ensuring equity and inclusion. We typically focus on what is measurable and quantitative. We also focus on what is efficient/ quick to do. Diversity is a more efficient aim than true equity and inclusion. This is an aspect of white supremacy culture."

"Diversity, Equity, and Inclusion are critical levers for us to reach our goals as an organization. DEI work should enhance performance across the organization. Some of our leaders currently and in the past have seen these things in conflict with each other. My hope is this survey helps to see them as 100% aligned."

"We need to ensure that we are inclusive and also that we are creating space and opportunity to actually achieve equity for our staff. I do not think we are there. Staff may be coming from diverse backgrounds, but what is their experience once they are here? How can we allow them to bring themselves to work without negative consequence?"

Finding #2 Diversity, equity, and inclusion are strongly tied to staff retention, particularly for people of color.

The "intent to stay" measure in our Staff Experience Survey looks at a staff member's self-reported likelihood of working in the same organization in three years. As only one in four organizations track retention by race/ethnicity, this measure serves as an important proxy.

We examined the factors most related to higher or lower intent to stay and discovered:

- Intent to stay is strongly correlated with staff members' perceptions of equity. Those who intend to stay were nearly twice as likely to report that career advancement is equally accessible, that their organization has an explicit commitment to equity, and that compensation systems are implemented fairly.

- Intent to stay also varies with respect to inclusion. People with positive intent to stay are 47 percent more likely to agree with the statement "I can bring my whole self to work."

- People with positive intent to stay give higher ratings to their organization's "diversity of thought and perspectives" (81 percent versus 57 percent) and to their organization having "a free and open exchange of ideas" (76 percent versus 49 percent).

The chart below shows the profound impact that diversity and perceived equity and inclusion have on intent to stay, both for white staff and staff of color. We see a 43 percentage-point gap (72 percent versus 29 percent) between the intent to stay of people of color in more diverse, inclusive, and equitable organizations versus in less diverse, inclusive, and equitable organizations. For white respondents on this measure, the gap is 17 percentage points (59 percent versus 42 percent). Diversity, equity, and inclusion is positively associated with intent to stay for all racial/ethnic groups but has a particularly strong influence on intent to stay for staff members of color.

Those who intend to stay were nearly twice as likely to report that career advancement is equally accessible, that their organization has an explicit commitment to equity, and that compensation systems are implemented fairly.

FIGURE 5 | Staff Intent to Stay in Diverse, Equitable, and Inclusive Organizations
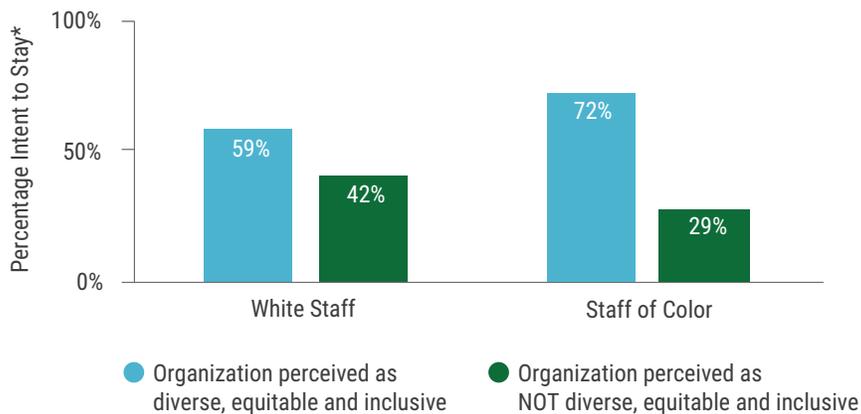
- Organization perceived as diverse, equitable and inclusive
- Organization perceived as NOT diverse, equitable and inclusive

* Intent to stay is defined as agreeing or strongly agreeing with survey question "I fully expect to be working in this organization three years from now."

Source: Staff Experience Survey

Not only do we see a strong association between retention and DEI, we also see evidence that organizations' awareness of the linkage may be low. On the Staff Experience Survey, we asked people whether they agreed with the following statement: "When people who identify as people of color leave the organization, lack of diversity, equity, and inclusion is often a factor." Only 14 percent of respondents who identify as white managers agreed with that statement. We know from the Organizational Profile Survey that most organizations do not track turnover by race/ethnicity, and only one in four cover DEI in exit interviews, so there is not a lot of internal data to support or challenge those beliefs. However, 38 percent of Latinx and 51 percent of Black staff members who are considering leaving their organizations agreed that the lack of diversity, equity, and inclusion is a factor when people of color leave the organization.

Discrimination — an active demonstration of exclusion — also has a strong relationship to intent to stay, whether one witnessed or directly experienced the discrimination. Respondents with a low intent to stay are 68 percent more likely to have witnessed discrimination. When the data is disaggregated, staff of all racial/ethnic groups who have witnessed discrimination are less likely to intend to stay and the difference is particularly pronounced for Black, Latinx, and multiracial staff members.

Most organizations do not track turnover by race/ethnicity, and only one in four cover DEI in exit interviews.

FIGURE 6 | Discrimination and Intent to Stay
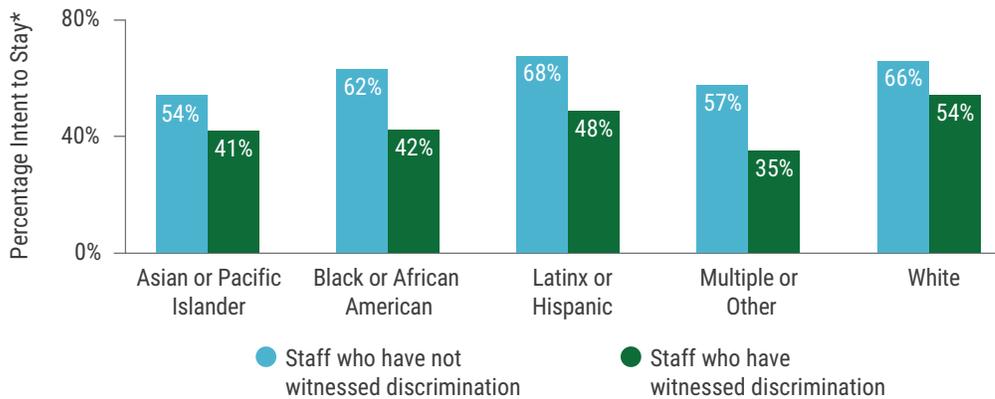
* Intent to stay is defined as agreeing or strongly agreeing with survey question "I fully expect to be working in this organization three years from now."

Source: Staff Experience Survey

"Nineteen of the last 23 people to leave {organization} have been people of color. This signifies a problem with both retention and DEI. We need to look at this and examine how opportunities for advancement & certain policies and structures alienate people [of color] and make them want to leave."

"Because the organization is so homogenous, not many people realize that we have a problem; the few who do are afraid to speak up, because our experiences in doing so have resulted in being ignored, having a reputation for being difficult, and being given performance reviews that explicitly ding us for introducing dissent. ...Even filling out this survey feels like a big risk. However, these things do greatly affect how comfortable, safe, effective, and happy I am in my job with this organization; I hope that by picking and choosing my battles as well as when to speak up, I can help make this organization better for people like me who may choose to join it in the future."

"I have never worked at a more ethnically/racially diverse organization in my life, and I love it. Granted, I come from the world of tech startups, where everyone was a white millennial, so the bar was set pretty low, but I can say now that I love my team and my organization's diversity. I truly believe our team is strong because of the diversity of backgrounds of our team members. Most importantly, more than anything else, it is imperative that our students work with staff who share similar backgrounds or ethnicities. I am proud to work at an organization that places an emphasis on diversity."

"Opportunities are not made transparent. I don't know how I would be promoted, but people around me (mostly white) are promoted to positions I didn't know existed or were available. When they are promoted, there is no communication on the application or what their qualifications are."

Finding #3 Staff members are more likely to promote a diverse, equitable, and inclusive organization.

The data establishes a mutually reinforcing relationship among diversity, equity, and inclusion, where staff members are more likely to report intending to stay in a diverse, equitable, and inclusive organization. In addition, staff members are more likely to promote and advocate for a diverse, equitable, and inclusive organization externally. We created a special promoter index to measure staff members' sense of affiliation with and willingness to advocate for their organization, comprising a high score on intent to stay and/or willingness to recommend the organization to a friend. We then looked for other ratings that were most strongly correlated with high scores on the index.

We compared how respondents from different subgroups answered survey questions — what we call a "gap analysis." Figure 7 shows the questions with the largest score gaps between "promoters" and "non-promoters": the seven questions where promoter scores were higher and the three questions where non-promoter scores were higher.

Staff members are more likely to report intending to stay in a diverse, equitable, and inclusive organization. In addition, staff members are more likely to promote and advocate for a diverse, equitable, and inclusive organization externally.

Questions related to equity demonstrate the strongest correlations with the promoter index. Promoters are twice as likely to rate compensation systems and career advancement opportunities in their organizations as fair when compared to non-promoters.

FIGURE 7 | Gap Analysis: Differences in Perceptions for "Promoters" and "Non-Promoters"

Survey Items With Largest Gaps

Item	Promoter	Non-Promoter
Our leadership team communicates well with the organization	80%	44%
Our compensation systems are implemented fairly	63%	28%
We have free and open expression of ideas, opinions and beliefs	80%	45%
Career advancement is equally accessible for all	64%	29%
Our organization has an explicit commitment to equity	68%	33%
I see a diverse group of employees advancing	61%	29%
I see a clear link between performance and opportunities for promotion	74%	42%
Staff turnover among people of color is influenced by a lack of DEI	18%	31%
I have been on the receiving end of discrimination at this organization	18%	35%
I have personally witnessed discrimination at our organization	25%	47%

Percentage Respondents Who Agree or Strongly Agree

● Promoter ● Non-Promoter

Source: Staff Experience Survey

We found similarly strong associations with Staff Experience Survey questions about organizational communication: Is there a free and open exchange of ideas; are leaders effective communicators; and do staff members have frequent conversations about race, power, and privilege? Promoters' ratings on these questions were 65 percent positive on average, more than double the scores of non-promoters.

Promoters are also more likely to believe that staff members in their organizations reflect diversity of thought and perspective and are inclusive, in comparison to non-promoters. In addition, promoters are more likely to perceive that management is committed to making progress on diversity, equity, and inclusion. One strong predictor of non-promotion? Having *witnessed* discrimination at the organization.

THEME #3
Organizations have an opportunity to dramatically increase diversity, equity, and inclusion by employing promising practices.

Our data generated rich information about why organizations engage in diversity, equity, and inclusion work, what they focus on, and how they approach the work. Within each area, we gleaned important information about the most common practices, the biggest gaps, and the relationships between practice and staff experience. Data gaps continue to be prevalent across organizations.

- **Finding #1** **A broad range of motivations for engaging in diversity, equity, and inclusion work is more powerful than any single motivation.**

- **Finding #2** **Organizations are underutilizing specific practices that advance diversity, equity, and inclusion.**

- **Finding #3** **Demonstrated management commitment is a strong lever for progress on diversity, equity, and inclusion.**

- **Finding #4** **Effective, authentic communication is a critical ingredient for change.**

- **Finding #5** **Data gaps at the field and organizational levels inhibit progress.**

Finding #1 A broad range of motivations for engaging in diversity, equity, and inclusion work is more powerful than any single motivation.

We asked Organizational Profile Survey respondents to select from a list of beliefs or motivations for advancing diversity, equity, and inclusion within their organizations. Respondents designated whether each motivation was primary, secondary, or not important to the organization. The figure below shows which motivations were mostly commonly selected as a primary motivation:

FIGURE 8 | Organizational Motivations for Engaging in Diversity, Equity, and Inclusion Work
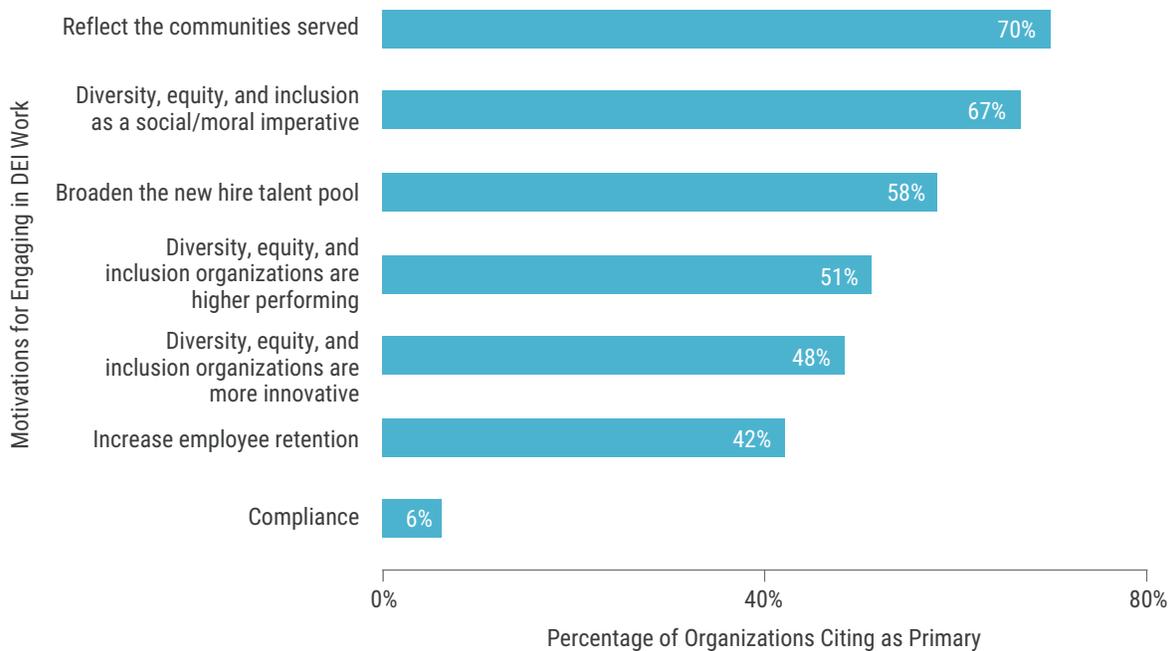
Source: Organizational Profile Survey

On average, organizations selected three of the seven motivations as primary. Motivations varied by organization type. For example, just over half of nonprofits and funders cited greater innovation as a primary motivator for their diversity, equity, and inclusion work. Only one-third of charter school management organizations pointed to innovation as a primary motivation, listing instead the social/moral imperative, reflecting the communities served (their student demographics), and broadening the new hire talent pool.

No single motivation was associated with the highest scores on diversity, equity, and inclusion across the Staff Experience Survey, but organizations identifying more than three motivations are more likely to engage in practices to accelerate diversity, equity, and inclusion amidst other pressing priorities. These organizations are twice as likely to have basic DEI policies in place and to ensure diverse input into decision-making,

and 60 percent more likely to have formal accountability measures for diversity, equity, and inclusion. In short, diversity, equity, and inclusion has become an organizational imperative.

"Diversity improves organizational performance, sharpens competition for top talent, represents a competitive advantage, reduces employee turnover, and enhances decision-making and execution."

"... We hold diversity as a core organizational value, and as a result believe that substantive, measurable, and effective practices must be in place to secure and continually improve the racial and ethnic diversity of our senior leadership teams. … Further, the demands of starting innovative schools … [mean] that many adults will wear many hats in new models of learning and that high-functioning and diverse teams unlock organizational success."

Finding #2 Organizations are underutilizing specific practices that advance diversity, equity, and inclusion.

Based on a combination of research and our experience working with organizations, we have identified promising practices that when implemented effectively help to advance diversity, equity, and inclusion. These policies, structures, practices, systems, and processes were drawn from a combination of the evidence base from the fields of talent management, leadership development, and organizational effectiveness, as well as from the work of seasoned experts on the core team and advisory group. For the study results, we divide these into four categories of work: **Policies and Structures; Strategy, Goals, and Accountability Measures; Systems and Processes;** and **Recruitment and Selection Efforts**. We go into each in more detail below.

Overall, we know that many organizations have intentions to become more diverse, inclusive, and equitable, but we find that fewer than half the organizations surveyed have basic DEI policies, practices, and structures from these categories in place.[35] (It's important to note that this data demonstrates the frequency of these practices based on reports from the 200+ organizations that completed the Organizational Profile Survey, not the quality of implementation or the relative value of one practice over another.)

Many practices are used in some organizations, but we see no standard set of practices being employed across organizations. Only nine out of the 47 practices in the survey are being used by more than 50 percent of the organizations. On the other hand, all but ten are in use by at least 20 percent of organizations in the survey. From the open-ended responses, it is clear that organizations have a desire to engage in DEI work, but are engaging in a wide array of practices and do not have a strong sense of what practices are most effective. In addition, a number of respondents mentioned that the act of responding to the survey gave them new ideas, indicating a need for more evidence on which practices are promising and under what conditions.

Overall, we know that many organizations have intentions to become more diverse, inclusive, and equitable, but we find that fewer than half the organizations surveyed have basic DEI policies, practices, and structures from these categories in place.

The following chart describes the percentage of organizations, as reported in the Organizational Profile Survey, that are implementing each of the practices.

FIGURE 9 | Percent of Organizations Implementing Diversity, Equity, and Inclusion Practices

What % have…	0–25%	25–50%	50–75%	75–100%
Policies and structures	• DEI Board committee • Official definition of DEI • Chief diversity officer	• Statement of DEI benefits • Written policy for DEI • DEI as a core value • Members of community on board • DEI in mission/vision		
Strategy, goals, and accountability measures	• DEI metrics at board and/or executive levels • Formally assessed DEI in the past 2 years • DEI on performance evaluation criteria	• DEI metrics for staff • A formal DEI strategy • Specific, measurable DEI goals • Regular DEI updates for senior leaders • Specific DEI actions planned to meet goals	• Made changes to foster DEI within the past 6 months	
Systems and processes	• Mentor programs • Formal coaching programs • Affinity groups • Buddy programs • External DEI advisory teams • Tracking diversity of suppliers • Process to collect student input	• Process to collect parent input • Process to collect community input • Ways to involve community in DEI efforts • Process for diverse input into decisions • Process for staff input on DEI • Job descriptions reflecting DEI goals • Internal DEI advisory teams • DEI as significant training component • Succession planning focus on DEI • Career development focus on DEI • DEI focus in exit interviews	• Flexible work locations • Active external DEI partnerships	• Minimum job requirements linked to duties • Family leave • Flexible work schedules
Recruitment and selection efforts	• DEI-specific training for recruiters	• Recruits meet with a staff member from a shared background • Practices to eliminate selection bias • Interviewer from underrepresented group	• Active outreach to underrepresented groups	• Formal onboarding • New hires interact with diverse staff

Source: Organizational Profile Survey

Policies and Structures

As discussed in Theme 2, Finding 2, staff members in diverse, equitable, and inclusive organizations have a high intent to stay in those organizations. By linking the data from the Organizational Profile Survey and the Staff Experience Survey we know that DEI policies and structures are also tied to intent to stay. Organizations with the highest intent to stay scores are twice as likely to have formal DEI policies in place as those with lower scores.

Mission-minded organizations frequently articulate their values through written statements of belief. These value statements can provide prospective and existing employees with a guidepost about the espoused beliefs of the organization. Organizations can use the process of articulating these values to collectively clarify and define the commitments that undergird the organization's actions.

Organizations with the highest intent to stay scores are twice as likely to have formal DEI policies in place as those with lower scores.

Only one-third of the organizations in this study have a written statement of why DEI benefits their organizations, and fewer than one in five have defined the terms diversity, equity, and inclusion. When a concept is not well defined, it inhibits consistent measurement. Before organizations attempt to enhance their measurement of diversity, equity, and inclusion, they need to define what diversity, equity, and inclusion mean to their internal team and external stakeholders. The process to define these terms represents an important opportunity for dialogue about the values and beliefs that undergird diversity, equity, and inclusion. Clarity about the driving values and beliefs enables more focused and targeted work, prioritization, and clarity about the trade-offs that decisions entail.

There is also a group of organizations in the sample that were founded and/or led by people of color that have fostered highly diverse, equitable, and inclusive organizations (based on the measures presented in Theme 2) yet have not made a significant investment in written policies and formal structures. These organizations may reflect an organic approach to diversity, equity, and inclusion where values are integrated into the way these organizations operate. While these organizations demonstrate the highest level of DEI integration into organizational culture and practices, one question for further exploration is about the sustainability of that culture as the organization grows and/or leaders turn over. Are formal policies and structures necessary to cement the commitments to diversity, equity, and inclusion over time?

"Our biggest barrier to inclusion is a compelling and shared definition of inclusion. While it may feel like a small step, a shared definition of inclusion would allow us to build shared language and therefore accountability for embodying inclusion in our everyday interactions."

"As an African American with experience in urban communities, I keep my eyes and ears on these issues and have formal and informal conversations about our values of diversity, equity, and inclusion with our leadership team. We hold them up as values, given the population we serve, but surprisingly [they are] not formally documented policy, nor formally measured."

"Honestly the main way we do this is by ensuring we have diversity at all levels of the organization. When you have that, there is simply no way any decision gets made without input from people with different backgrounds. We don't have to create special structures to make this happen."

FIGURE 10 | Presence of DEI Policies and Structures, All Organizations

DEI Policies and Structures

- Have DEI in mission/vision statements — 50%
- Have a written policy for diversity — 49%
- Have members of the community on board — 48%
- Have DEI as a core value — 46%
- Have a written policy for equity — 40%
- Have a written policy for inclusion — 35%
- Have a statement of DEI benefits — 30%
- Have an official definition of diversity — 17%
- Have a Chief Diversity Officer — 17%
- Have an official definition of equity — 13%
- Have an official definition of inclusion — 8%
- Have a DEI Board committee — 6%

Percentage Responding Yes

Source: Organizational Profile Survey

Strategy, Goals, and Accountability Measures

Human behavior often changes based on what is measured, as measurement can serve as a proxy for values and focus.[36] One area that stands out in the data is the relatively small percentage of organizations that employ formal accountability practices in their work on diversity, equity, and inclusion. This is particularly notable in a field that has demonstrated a heightened focus on outcomes measurement over the past two decades. In the case of diversity, equity, and inclusion, the lack of clear definitions inhibits measurement, which could otherwise be an important opportunity to reinforce values and hold team members formally accountable for progress.

Staff and leadership accountability for diversity, equity, and inclusion actions also has a strong association with high inclusion, equity, and intent to stay scores, yet too often the work stops at a plan without follow-through.

As illustrated in Figure 11 below, organizations are significantly more likely to have specific measurable goals and a formal strategy related to diversity, equity, and inclusion (approximately one-third of organizations) than they are to hold staff, executive team members, or board members accountable for progress toward those goals (one-fifth of organizations include DEI metrics on staff performance appraisals). Thirty-eight percent of organizations have regular updates on DEI progress for their senior leaders, yet only 16 percent have formal accountability measures for their executive teams related to diversity, equity, and inclusion.

One area that stands out in the data is the relatively small percentage of organizations that employ formal accountability practices in their work on diversity, equity, and inclusion.

FIGURE 11 | DEI Strategy, Goals, and Accountability Measures, All Organizations

DEI Strategy, Goals, and Accountability Measures	Percentage Responding Yes
Made changes to foster DEI, past 6 mos	60%
Have specific DEI actions to meet goals	43%
Have regular DEI updates for senior leaders	37%
Have specific measurable DEI goals	34%
Have a formal DEI strategy	31%
Have DEI metrics for all staff	30%
DEI is on performance evaluation criteria	22%
Have DEI metrics for the board	19%
Have done formal assessment, past 2 yrs	16%
Have DEI metrics for the exec level	15%

Source: Organizational Profile Survey

"As a member of our DEI committee, I find it problematic how much time and energy is spent discussing how we want to approach DEI without ever actually DOING anything. The perception of this committee by the rest of the organization is that they don't actually do anything and that it's not a priority for the organization as a whole. As a member of the committee, I agree with everyone else. Leadership and the committee act completely separately from each other — the Leadership Team even has their own committee! This makes no sense to me and angers many of my colleagues. I think it is commonly believed that this survey will be administered, results will be distributed to leadership, they'll announce the findings, and if we're lucky, [create] an action plan, but that will be it. No action will actually happen and no changes will take place because nobody is willing to prioritize it, and the cycle will continue. It always does."

"I believe our biggest barrier to achieving equity is shared accountability. We have not yet established clear enough expectations and processes for what it means to be an equitable organization for our staff and students. Without that foundation, we are unable to effectively consider, question, and change practices that are intentionally (or unintentionally) reinforcing societal inequities."

"What I find most often is D&I work can be all lip service and little action, making it feel an insincere, going through the motions, 'on trend' thing to do just to check a box."

Systems and Processes

Organizations develop a wide range of systems and processes related to elements of diversity, equity, and inclusion. Practices that promote general and race-neutral work/life flexibility show up as the highest areas of investment. Organizations are two to three times more likely to employ general work/life flexibility practices than they are to report DEI-specific talent practices. While work/life flexibility confers benefits to all staff members, these practices are often initially launched by organizations to increase gender and parental equity and staff retention. It's interesting to note that female staff members are overrepresented in the sample at the staff and leadership levels. Seventy-three percent of the staff members in the sample identify as female, as do 61 percent of the leadership team members and 50 percent of the CEOs. While work/life flexibility practices are generally beneficial to staff and may contribute to women in leadership positions, they less explicitly address race/ethnicity.

A focus on developing talent with a diversity, equity, and inclusion lens shows up as the lowest current area of investment. Developing talent can include formal coaching programs, buddy or mentoring programs, ongoing feedback from managers and peers, on-the-job training, and career development support. This underinvestment can be particularly detrimental to people of color in majority-white organizations that require assimilation to the dominant culture norms for recognition and promotion.[37] The need to crack the code about what it takes to advance in this type of organization,

Organizations are two to three times more likely to employ general work/life flexibility practices than they are to report DEI-specific talent practices.

along with implicit bias, can have a disproportionately negative effect on individuals who are less familiar with the dominant culture norms. The existence of mentors, coaches, and other staff members who can serve as professional guides are critically important to enable groups that are underrepresented in management to advance.[38]

FIGURE 12 | DEI Systems and Processes, All Organizations
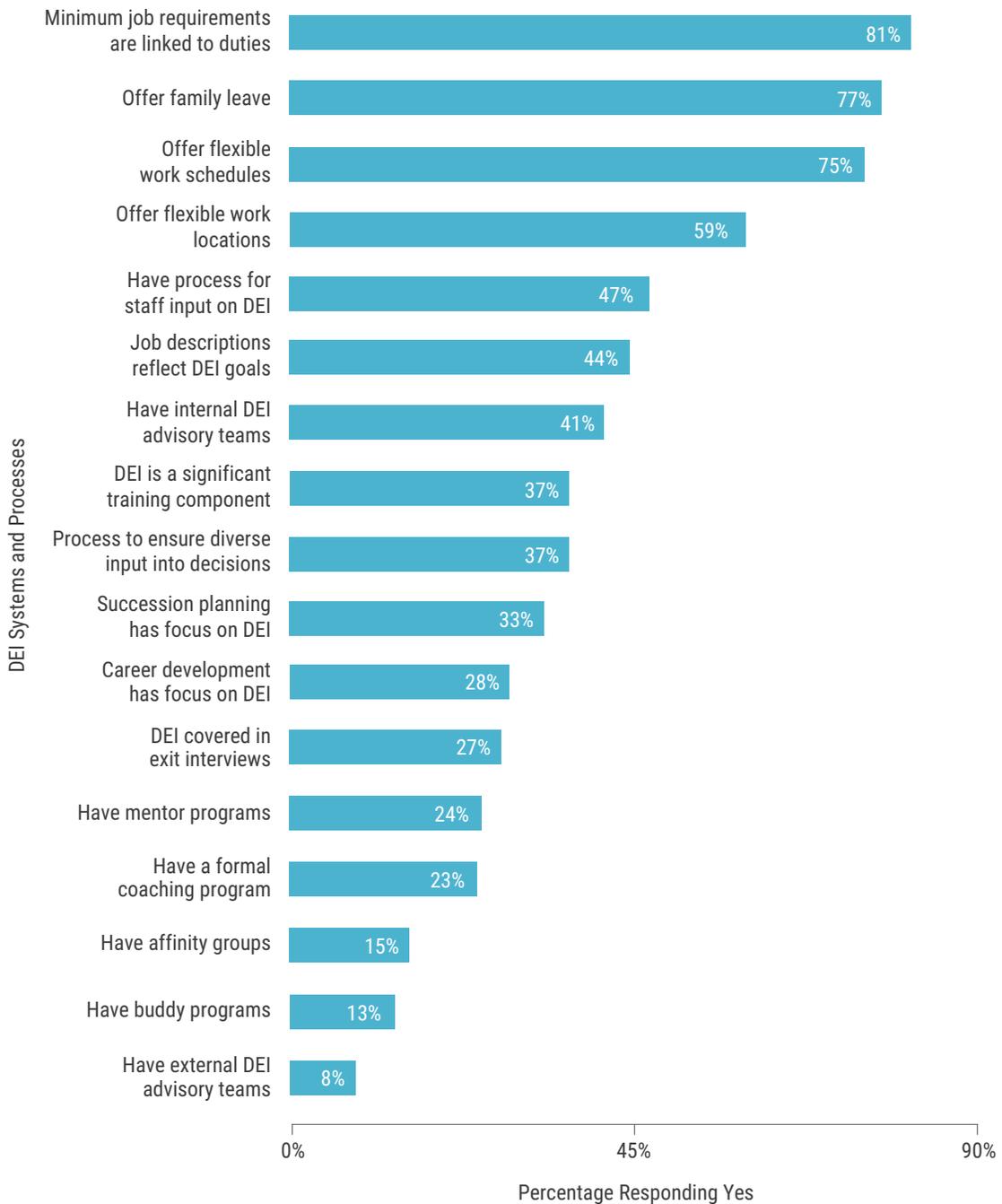

Source: Organizational Profile Survey

"We haven't defined inclusion, nor named the aspects of it that we're most concerned about addressing first. We don't have goals or specific strategies to help us achieve those goals. We don't have someone who's explicitly charged with focusing on this (& pounding the table in other convos), nor existing procedures to ensure it remains top of mind."

"[We have a] lack of ... mechanisms to address these type of issues outside of human resources. Some staff merely want to be able to have conversations without fear of retribution or making a formal complaint. Having someone with a counseling background or formal mediation training might be helpful."

Recruitment and Selection Efforts

Recruitment and selection of new hires is an essential area for organizations to act on their commitments to diversity, equity, and inclusion. As Figure 13 demonstrates, more than two-thirds of respondents reported mechanisms to foster DEI in recruitment and onboarding, but the reverse was true when it came to practices related to diversity, inclusion, and equity-related selection and hiring processes such as training to eliminate selection bias. Given the well-established role of implicit bias in hiring processes, this presents an opportunity for organizations to focus on equity in the hiring process.[39]

FIGURE 13 | DEI Recruitment and Selection Efforts, All Organizations
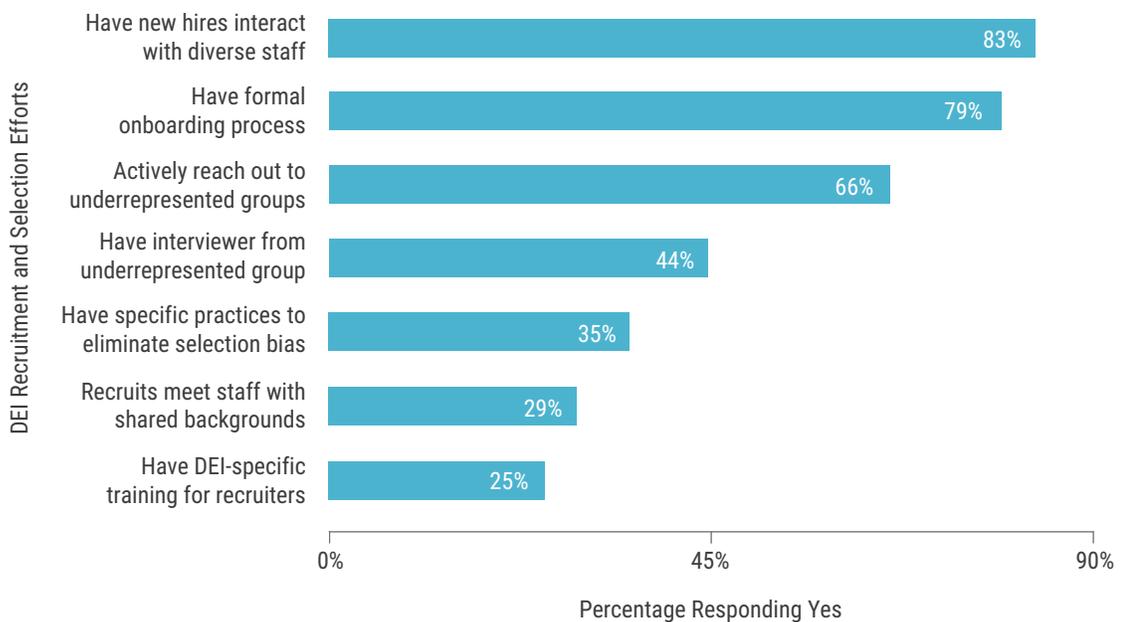
Source: Organizational Profile Survey

While organizations are engaged with a wide variety of practices related to diversity, equity, and inclusion, the vast majority of practices are employed by fewer than half of the organizations in the sample. Further research is necessary to connect the effectiveness of particular practices to fostering DEI outcomes. One important caution: There is no standard recipe for the most effective combination of policies, structures, systems, and processes — it is highly contextual. Organizations that approach DEI work as a technical checklist are sure to miss some of the adaptive leadership behaviors that bring these practices to life.[40] The next two findings describe the importance of leadership actions to foster a diverse, inclusive, and equitable environment.

PARTICIPANT INSIGHTS

"We need to give diverse populations a reason to come work at our school. It is not enough to get people in the building. We have to give them a reason to jump on board and stay."

"We typically rely on word of mouth and recommendations for position openings. However, most of our staff are white women, so we tend to fill positions with white women. … I think we can do more to encourage diverse candidates to apply, or if they are applying, we should examine if there is implicit bias in why they are not being hired."

Finding #3 Demonstrated management commitment is a strong lever for progress on diversity, equity, and inclusion.

Among the nearly 5,000 respondents in the Staff Experience Survey, 61 percent offered positive ratings for management commitment to diversity, equity, and inclusion, 18 percent rated their management's commitment to diversity, equity, and inclusion negatively, and the remainder were neutral. Our findings show that leaders modeling a commitment to diversity, equity, and inclusion is one of the most valuable strategies to advance organizational diversity, equity, and inclusion.

The gaps between organizations where staff perceive a senior management commitment to DEI and those where staff do not constitutes *one of the most pronounced differences in the data set*. Respondents who perceive that their organization's management actions model a commitment to diversity, equity, and inclusion are more likely to perceive that staff members are held accountable for DEI, commitments to equity and inclusion are explicit, and instances of experiencing or witnessing discrimination are significantly lower. Figure 14 demonstrates the largest gaps between organizations where employees perceive high versus low management commitment to diversity, equity, and inclusion.

Leaders modeling a commitment to diversity, equity, and inclusion is one of the most valuable strategies to advance organizational diversity, equity, and inclusion.

FIGURE 14 | Gap Analysis: Score Differences Among Respondents Who Perceive Management Commitment to DEI Is High Vs. Low

Survey Items With Largest Gaps

Staff members are held accountable for DEI — 75% / 11%

Our leaders prioritize DEI — 71% / 7%

Our organization has an explicit commitment to inclusion — 84% / 22%

Our organization has an explicit commitment to equity — 75% / 16%

We have free and open expression of ideas, opinions and beliefs — 84% / 25%

I would recommend a friend from a marginalized background — 86% / 27%

Our organization's DEI initiatives are effective — 68% / 12%

Staff turnover among people of color is influenced by a lack of DEI — 18% / 41%

I have been on the receiving end of discrimination at this organization — 19% / 50%

I have personally witnessed discrimination at our organization — 25% / 67%

Percentage Respondents Who Agree or Strongly Agree

● High Management Commitment   ● Low Management Commitment

Source: Staff Experience Survey

Staff in organizations where management models a commitment to diversity, equity, and inclusion are also dramatically more likely to see diversity, equity, and inclusion talent practices. Respondents who perceive that their management is committed to diversity, equity, and inclusion respond more positively to the following questions by a margin of almost 50 percentage points versus respondents who perceive low management commitment:

- Recruiting efforts are designed to yield a diverse group of candidates (66 percent versus 18 percent)

- Our organization tries to remove bias in our hiring process (73 percent versus 24 percent)

- I see the same opportunity for advancement for all racial/ethnic identities (83 percent versus 38 percent)

- Our onboarding process signaled to me that we are inclusive (66 percent versus 20 percent)

Organizations whose staff perceive management to be committed to diversity, equity, and inclusion also demonstrate a higher likelihood of developing an inclusive culture. Staff in these organizations are almost three times more likely to report that their management teams communicate effectively, that their organizations have a diversity of perspectives and beliefs, that they can bring their "whole self to work," and that their organizations actively work to eliminate exclusion.[41] Staff in these organizations are more likely to report that they can contribute meaningfully in meetings and they experience more frequent conversations about race, ethnicity, power, and privilege — all of which demonstrate an openness to challenge traditional hierarchy and dominant cultural norms.

Conversely, staff who rate their organizational management commitment to diversity, equity, and inclusion as low are more likely to report that they have witnessed (67 percent versus 25 percent) or personally experienced (50 percent versus 19 percent) discrimination at the organization in comparison to staff who rate their organizational management commitment as high. They are also more likely to report that when their colleagues of color leave the organization, it is in part because of a lack of diversity, equity, and inclusion.

Organizations whose staff perceive management to be committed to diversity, equity, and inclusion also demonstrate a higher likelihood of developing an inclusive culture.

PARTICIPANT INSIGHTS

"For the past three years, we've been able to piece together specific activities, but none have been fully aligned to our organizational strategy. This will require full commitment from the executive team to not only name but model for the entire organization what it looks like to intentionally increase workforce diversity."

"Our organization says a lot of things about DEI but rarely does anything substantive in response. I have seen overt sexism and racism in meetings at multiple times, often perpetuated by higher-level managers. When these transgressions are called out I have yet to see a manager own it -— denying that racism was at play, gaslighting (flat out denying that words were said even with multiple other team members saying they were), and other defensive techniques are always involved. It's infuriating to be a part of an organization that pays lip service to such important values but does not

turn the lens inward to critically examine their own practices. Additionally in the rare moments when I have seen senior leaders trying to work on their practices, they often do so by putting the burden on marginalized populations (e.g., a white leader asking for feedback and affirmation of growth from a person of color; a man sharing his journey to awareness of sexism with women and looking for approval). It's exhausting and oppressive."

"Commitment from senior leadership to make diversity a priority in the organization is a major barrier. [They have a] lack of knowledge and experience with diverse people. This field has traditionally been led by middle-class, white women. Predominance of the white culture influencing … continues today. Seeing the value (let alone, the requirement) of having a diverse organization has been missed by senior leadership."

Finding #4 Effective, authentic communication is a critical ingredient for change.

Theme 1, Finding 2 explored the ways that diverse teams seek input from broad sources. This finding looks at internal communication as a tool that can advance diversity, equity, and inclusion in any type of organization. There is a strong relationship between diversity, equity, and inclusion practices and perceived communication effectiveness at all levels and in all directions in the organization, including leadership communication, lateral communication, and input from internal and external stakeholders. While it's logical that people feel included when they have a voice in decision-making, when they can discuss sensitive topics openly, and when leadership processes are transparent, the degree to which this influences staff perceptions is striking.

Specifically, effective communication was more highly correlated with perceptions of equity and inclusion than any of the other diversity, equity, and inclusion practices. Staff also perceive that their organizations are more diverse if there is a culture of open communication. Open communication in the study is measured by the degree to which respondents agreed with the following statements:

- Our leadership team communicates well with the organization
- We have frequent conversations about race/ethnicity re: our work
- We have frequent conversations about race/ethnicity re: how we work
- We have frequent conversations about power and privilege
- We have free and open expression of ideas, opinions, and beliefs

There is a strong relationship between diversity, equity, and inclusion practices and perceived communication effectiveness at all levels and in all directions in the organization, including leadership communication, lateral communication, and input from internal and external stakeholders.

Figure 15 demonstrates that positive inclusion ratings are significantly higher across all racial/ethnic groups if respondents rate leadership communication highly. A similar pattern is displayed in Figure 16 with respect to equity. Staff ratings of equity in the organization have a strong association with perceptions of the quality of communication of the leadership team.

FIGURE 15 | Links Between Perceptions of Inclusion and Leader Communication
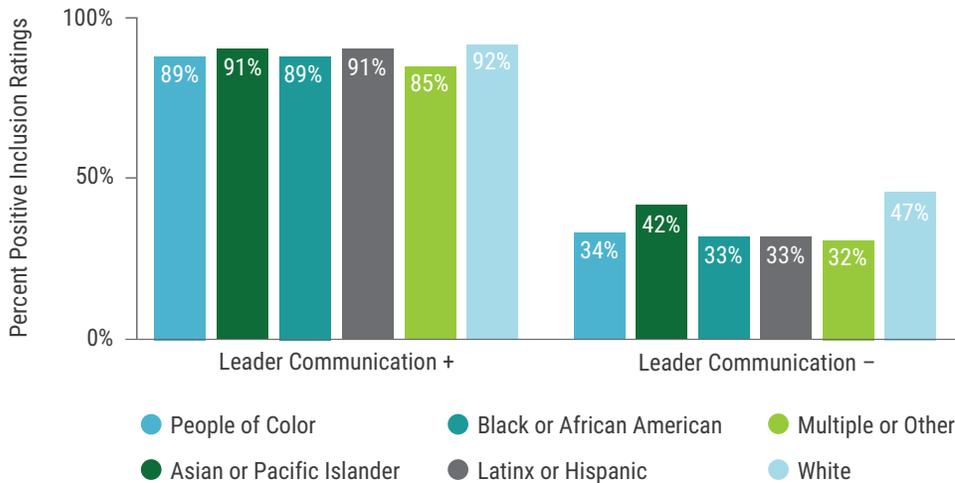
Note: This chart shows the % positive inclusion ratings among respondents who rate their leaders' communication positively vs. negatively.

Source: Staff Experience Survey

FIGURE 16 | Links Between Perceptions of Equity and Leader Communication
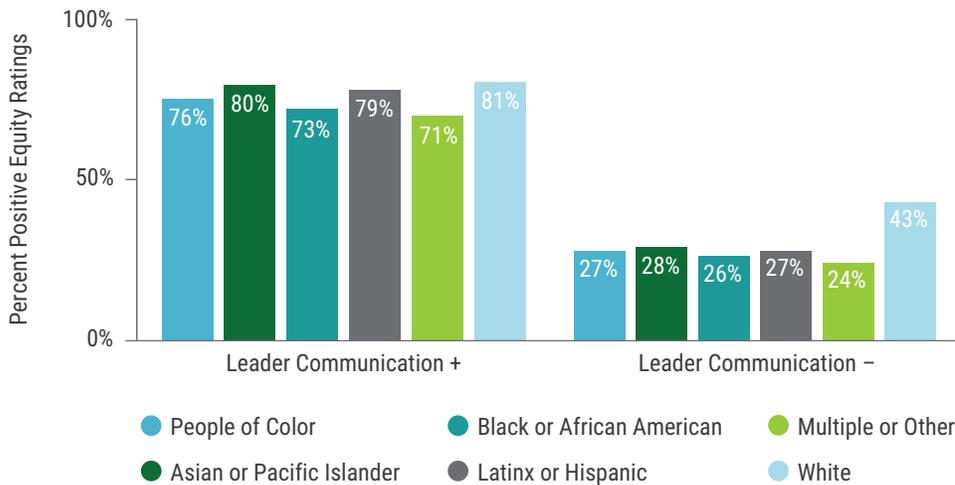
Note: This chart shows the % positive equity ratings among respondents who rate their leaders' communication positively vs. negatively.

Source: Staff Experience Survey

"I think we do a good job [at DEI], but we do a poor job explaining it. Feedback loops are pretty strong to upper management but not back down to entry-level staff and youth participants ... I would love to look at more models for how to convey success and transparency."

"The biggest barrier is that DEI conversations, while critical, can be challenging. I do not think our organization has leaned into that discomfort."

"I'd love to talk more about these issues and concepts at work. I can see us pushing toward an ongoing conversation, but right now, I feel like I am still turning to outside of {organization} to have these kind of talks, specifically those around race. Sometimes I hear conflicting messages on what I, as a white woman, can do to best support, empower, and elevate the voices of people of color. Even right now, I worry that using the words 'support' or 'empower' sounds condescending. I am silent often because I fear getting it wrong — but not speaking up ensures I get it wrong."

Finding #5 Data gaps at the field and organizational levels inhibit progress.

In a field that is highly focused on measurement, one in which goals, actions, and resources align largely with what is measured, it's important to determine what DEI-related data organizations are currently collecting. The answer is: not much. Data gaps were a recurring theme throughout the study.

Across the sample, organizations are not collecting many sources of DEI data beyond candidate and staff race/ethnicity. Across the field, nothing is collected systematically (i.e., using the same categories), not even demographics. Organizational Profile Survey responses, for example, indicate that 98 percent of organizations collect racial demographic data, but fewer than ten percent of organizations track the socioeconomic background of their employees (see Figure 17 below). While underrepresentation of people of color in leadership is well documented, and research across sectors demonstrates implicit racial and gender bias in hiring, evaluation, and promotion decisions, only one in four organizations in our study collect data on promotion and retention by race/ethnicity.[42] Organizations with higher leadership team diversity were slightly more likely to track compensation and advancement by race and ethnicity, but even still, fewer than one-third of these organizations collect this data. Higher leadership diversity organizations were slightly less likely to track turnover by race/ethnicity than less diverse organizations.

In a field that is highly focused on measurement, one in which goals, actions, and resources align largely with what is measured, it's important to determine what DEI-related data organizations are currently collecting. The answer is: not much.

FIGURE 17 | Inventory of DEI Data Collection, All Organizations

DEI Data Collection	Percentage Responding Yes
Demographic data, leadership	98%
Demographic data, staff	96%
Hiring by race/ethnicity	71%
Candidates by race/ethnicity	70%
Staff turnover by race/ethnicity	42%
Hiring from within vs. from outside the organization	41%
Socioeconomic background, population served	37%
Hiring recent graduates vs. experienced	33%
Hiring from the education sector vs. other sectors	29%
Pay equity by race/ethnicity	27%
Promotions by race/ethnicity	26%
Candidates by socioeconomic background	11%
Executive team socioeconomic background	9%
Staff socioeconomic background	8%
Board socioeconomic background	5%

Source: Organizational Profile Survey

This data gap is not only true at the organizational level but is mirrored at the field level, making it difficult to measure progress on DEI or talent practices more generally. Without this information, how can organizations know that their policies and practices are equitable? It is interesting to note that 237 organizations started but did not complete the survey. Of those, 83 percent stopped before completing the demographic section (the first section). We suspect that the inaccessibility of data was an influential factor.

"Not sure I can say we 'track' data, but we prioritize trying to source candidates of color for all positions we hire."

"We are working towards naming our explicit goals behind our diversity efforts, but haven't gotten there yet. As a data-driven, goal-driven organization, I am confident that if we named specific goals we would adjust our actions accordingly and meet them quickly. Our barrier is a will/ mindset that resists the idea that a focus on diversity (beyond what we're already doing) is fundamentally important to success in our mission."

While the primary focus in this study is to better understand internal organizational work on diversity, equity, and inclusion and implications for the talent in the organization, there is great and justified interest in understanding the links between diversity, equity, and inclusion and student outcomes. One of the most common questions that we field is "Are the organizations that are diverse, equitable, and inclusive getting better results for students?" Given the early stages of this body of work, traditional statistical modeling that might link internal, organizational work on diversity, equity, and inclusion (or "workforce DEI") and student learning outcomes is not feasible. The measures on either end of the chain — workforce DEI and student success — are not universally defined, much less quantified, and existing metrics are not consistent across the participant organizations. Furthermore, a number of the organizations participating in the study are not directly impacting student learning, but rather impacting schools through programs, products, services, policies, and funding. Doing the research to isolate the variables that directly influence student achievement in this chain and draw causal links between workforce diversity, equity, and inclusion and student outcomes would require significant resources, time, and collaboration. Some statistical experts even argue that it is impossible to draw direct, causal linkages between, for example, the levels of workforce diversity, equity, and inclusion within a nonprofit service provider, a funder, or the central office of a school operator and student achievement. That said, we were not ready to give up on contributing to the knowledge base about the linkages where feasible. We felt that a simple opinion poll would not give us the credibility or depth of insight we wanted. As a result, we designed an exploratory methodology that was feasible, rigorous, and credible using a combination of an analytic approach called the Most Significant Change Technique[43], existing research, and field-level observations to explore what the primary areas of impact might be.

First, we drew on existing research and logic models related to the topic. We then supplemented this with findings from our surveys. Finally, we adapted the Most Significant Change Technique, an approach utilized in the international development field to study complex interventions by identifying the most significant lines of impact between two variables. For this analysis we enlisted over 100 leaders and experts from across the field to share their experience, using the following core question:

"What would you say is the single most significant way that student outcomes are positively impacted when your organization is diverse, inclusive, and equitable?"

In the responses, six lines of impact were most frequently reported and suggest the significant ways in which organizations that are diverse, equitable, and inclusive influence student success:

#1 Deep understanding of the students served

#2 Increased cognitive diversity

#3 Foundation to develop trusting relationships

#4 Diversity of leaders and teachers

#5 Greater staff engagement

#6 Ability to see the path toward equity

Figure I on the next page illustrates the frequency with which each line of impact was mentioned.

FIGURE 1 | Linking DEI with Student Success, Relative Mentions by Theme
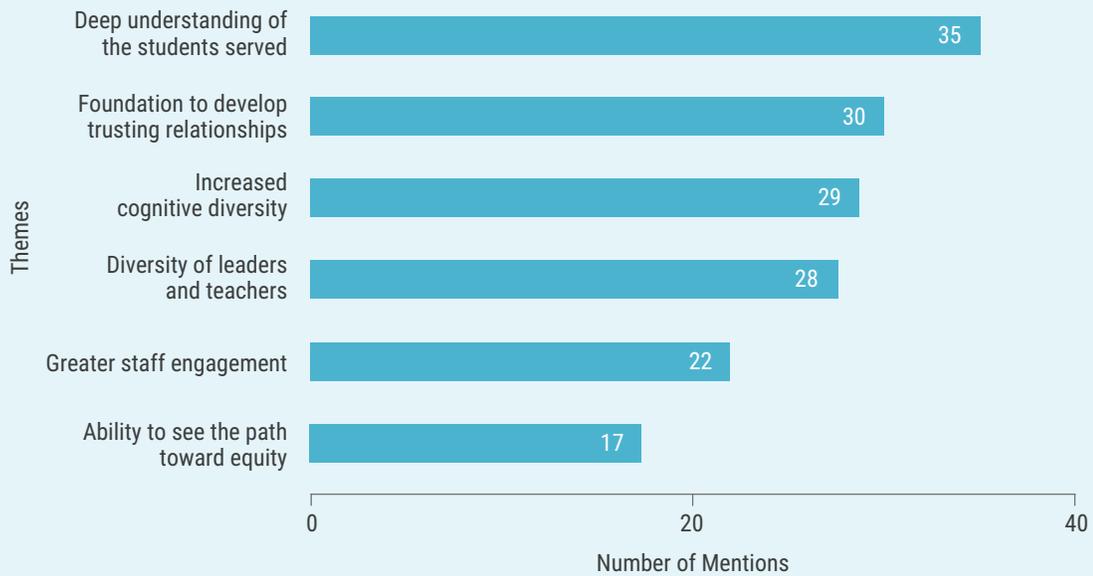
Source: Study of Linkages Between Organizational DEI and Student Success

Below are additional details about the assessment and each of the findings generated through this analysis:

#1 Deep understanding of students served. Diverse, equitable, and inclusive organizations have a deeper, fuller understanding of communities they serve. This both enables them to do work that is relevant and effective and also serves to give all students a virtual "seat at the table," a voice in setting strategies and priorities.

Research shows that culturally relevant products,[44] curricula,[45] and pedagogy[46] produce better learning outcomes. And the benefit of deeply understanding the context and lived experience of students is not limited to the classroom: This theme also emerged as a critical factor for education service providers, funders, software developers, and policymakers.

Within this category, some specific practices and competencies that participants identified include social-emotional understanding; ability to appreciate the context of a student's experience and utilize that knowledge to inform practice; recognizing, designing, and adjusting for students' needs; incorporating linguistic and other contextual nuances; and recognizing and removing bias.

PARTICIPANT INSIGHTS

"... Our faculty reflects the diversity of the students we serve, providing insights into students' lives and educational experiences that we might otherwise miss. When students see themselves reflected in our work, they are more apt to see themselves as active participants in it."

"[Diversity, equity, and inclusion in our organization] helps ensure that we are prioritizing our work, effort, energy, and investments for the best interest of students. Our organization automatically thinks of diverse children when they think of what will work and what might not."

"Teams that reflect the lived and life experiences of the students they serve are better able to design and execute effective solutions that eliminate certain blind spots and potential bias[es]. The tools we create are more effective at engaging educators in realizing and being motivated to respond to equity gaps in their classrooms, schools, and systems."

#2 Increased cognitive diversity. Cognitive diversity — or allowing for differences in perspective and/or the way individuals process information — produces better decisions, more innovation, and higher team performance.

Numerous studies have shown that organizations reflecting cognitive diversity are higher performing[47] and that diverse teams are more creative and more innovative.[48] This became a major theme in our study, with participants pointing to better decision-making, idea generation, problem-solving, resource allocation, and breakthrough thinking when organizations have cognitive diversity.

"Having multiple perspectives on our team allows us to view our students' learning differently, changing our approach and strategies of support."

#3 Foundation to develop trusting relationships. Organizations with high levels of diversity, equity, and inclusion are better able to build and maintain trusted relationships with others across the field.

Over a quarter of survey participants cited trusted relationships, or "relational trust,"[49] as Bryk and Schneider describe it, as an essential benefit of diversity, equity, and inclusion. The relationships most often referred to were the student-teacher relationship, but others mentioned relationships with parents and local communities, within work teams, up and down organizational hierarchies, and with partner organizations. When people provided a rationale for diversity as important to building trust with other partners, they mentioned factors such as respect, safety, common values, and authentic communication.

"When you operate within a culture of trust and mutual respect — among students and staff, with parents and community, and with partner organizations — everything works better. Minds open, hearts engage, and relationships flourish."

"... Authenticity opens doors"

#4 Diversity of leaders and teachers. Diversity of the teaching workforce directly impacts student achievement. Participants affirm the many studies showing that higher expectations set by teachers of color get results,[50] and that students respond positively to teachers and leaders whom they can view as role models.[51]

Greater leadership team diversity in education organizations produces analogous results and contributes directly to their mission effectiveness. Staff, as well as students, look at their leaders and see whether and how they fit into a future world.

"Our students see themselves and their futures in their teachers and leaders: They experience higher expectations and fair discipline, they achieve at higher rates, and they are more likely to graduate from high school and go to college."

"We develop better and more creative solutions to advance student outcomes when these solutions emerge from the invaluable perspectives, insights, and lived experience of leaders who reflect the students we serve (primarily students of color who are growing up in low-income communities)."

"DEI means changing who is at the table, which is critical for our youth to create the world they want to see."

#5 Greater staff engagement. Inclusive, equitable organizations have more engaged staff. This in turn increases the quality of work and lowers costs,[52] both of which contribute directly to mission effectiveness and ultimately to student success.

As this report will demonstrate in Theme 2, surveys show that inclusive organizations can expect to have higher staff advocacy and lower turnover. Other research shows similar findings around staff engagement and satisfaction.[53]

"When our organization is diverse and feels inclusive and equitable, all team members are invested in doing their best work, and great ideas can flourish to help impact student outcomes."

#6 Ability to see the path toward equity. Organizations that are not diverse and inclusive may not be able to even see bias and inequities in their work and in the world, a vital first step toward creating highly equitable environments.

Building on the first theme of understanding and "a seat at the table," this theme goes deeper to posit that the perspective and voice of people from historically marginalized backgrounds is needed for organizations to recognize, measure, and act on the roots of inequity.

"Myriad perspectives ensure that the program … is working to dismantle systems of oppression. Essentially, this ensures that organizations aren't implicitly or invisibly or mistakenly perpetuating racist policies and practices that directly touch kids."

"When our organization is diverse, inclusive, and equitable, it provides a living example of a more equitable world."

"Privilege is blind to inequity."

"Organizations as a whole that are not diverse, inclusive, and equitable are more likely not to question structures of patriarchy, white supremacy, and classism because those systems are so intertwined into their own structures that they are a given and can feel like questioning the air you breathe. [This can become] a vicious cycle that continues until we intentionally and explicitly interrupt it."

The base of research linking diversity and inclusion (and to a lesser extent, equity) to mission effectiveness and improved learning outcomes is already compelling. Our exploratory scan of organizations across the field provides additional evidence for why the diversity, equity, and inclusiveness of organizations in our sector are such important ingredients toward the common goal of helping all students succeed. Future research on diversity, equity, and inclusion can focus metrics around these themes to provide deeper insights into their contributions to student success.
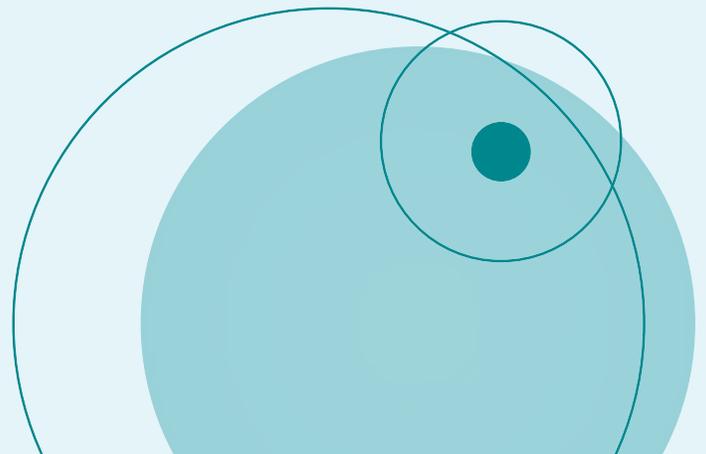
ADDITIONAL INSIGHTS AND IMPLICATIONS

In our decades of collective experience working with organizations as staff members and consultants, our team of experts has witnessed patterns in organizational efforts to address diversity, equity, and inclusion. These experiences, combined with our analysis of the survey data, lead us to additional insights extending from this research. In particular, three themes stand out as areas with implications that merit further discussion: inclusion, not assimilation; shifting power dynamics; and critical roles for leaders.

Inclusion, Not Assimilation

A focus on diversity alone is insufficient. An employee's sense of belonging (inclusion) and experience of fairness (equity) are critically important. The three qualities are mutually reinforcing within an organization, and the combination of perceived diversity, equity, and inclusion is a strong predictor of a staff member's intent to stay in an organization and willingness to promote it to others (as discussed in Theme 2 Finding 2 and illustrated in Figure 5 on page 29).

It is particularly important for organizations not to mistake assimilation for inclusion.[54] An inclusive workplace culture is characterized by the full integration of a diverse set of staff members into an organization with a climate of respect and positive recognition of differences. Neither behaviors, norms, and practices nor institutional structures, systems, or policies pose barriers to a positive experience for staff from historically marginalized identities in an inclusive workplace. Further, structures, physical spaces, services, communications, information, and resources are all equally accessible to people from a range of identities in inclusive organizations.[55]

In contrast, organizational cultures that require assimilation are characterized by opening doors to people of color but not making substantive shifts in culture, policies, norms, decision-making, communication, or power structures. These organizations are often defined by white cultural norms (see Section IV for a glossary of terms) and require people of color to adopt the behaviors of the organization to succeed.
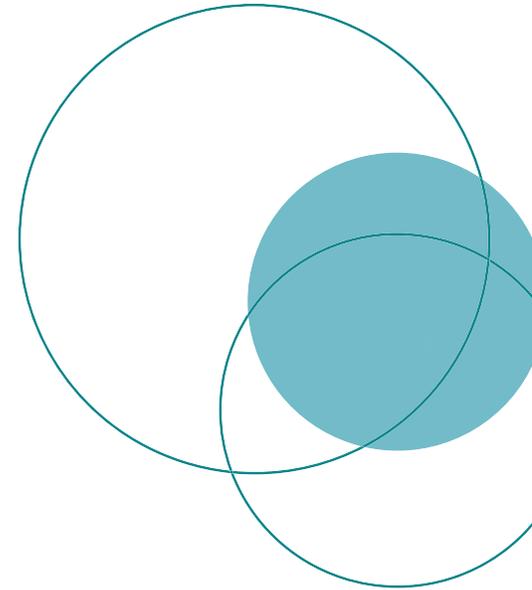
An inclusive workplace culture is characterized by the full integration of a diverse set of staff members into an organization with a climate of respect and positive recognition of differences.

Trends like low retention rates for people of color may indicate a culture in which people of color must assimilate or risk being perceived as lagging in performance or "making waves." Failure to assimilate within organizations and society can result in the loss of credibility, trust, influence, social status, jobs, healthcare, financial stability, and even life.

In such scenarios, some people of color may be silent to ensure their safety, stemming from unconscious and/or conscious fear of retaliation from white people. (See Sidebar 3 below for more on white defensiveness and resistance.) They may also protect and identify with white cultural norms or minimize and deny experiences of oppression and discrimination.[56] These environments can be taxing for people of color, who may spend cognitive and emotional energy code-switching (see Section IV for a definition of this term), intensely monitoring tone, self-silencing, or otherwise accommodating white dominant culture.[57]

Organizations that require assimilation may not be questioning their fundamental practices and the power structure that perpetuates inequities, both inside of organizations and in relationship to the work they are doing with children. If people of color, or any marginalized group, have to assimilate with the norms of the existing culture to belong and to succeed, the full range of organizational benefits of associated with diversity will go unrealized.[58] Environments that require assimilation don't maximize the potential contributions of a diverse group of staff members and miss out on valuable skills and perspectives.

An important tension to note is that effective teams and organizations build a strong, consistent culture that is anchored in a set of values. One of the important functions of recruitment is to attract employees who will thrive within that culture, and onboarding, professional development, leadership behaviors, organizational rituals, and communication are all important vehicles to reinforce culture. Organizations can confuse the desire to build a strong, values-driven culture with assimilation. A narrow focus on seeking employees who fit in a culture that requires assimilation to a limited set of cultural norms does not allow for diversity of identity, perspective, or background. One important way for organizations to address this tension is to consistently question the genesis of organizational norms, culture, and practices; to be explicit and intentional about the rationale behind them rather than defaulting to "this is just the way we do things"; and to shift away from those practices that are inhibiting a diverse group of employees' experience of equity and inclusion. In short, is the organization undertaking a true power shift to create an environment in which all team members can thrive?

Organizations that require assimilation may not be questioning their fundamental practices and the power structure that perpetuates inequities, both inside of organizations and in relationship to the work they are doing with children.

"As a first-generation college student who identifies as poor and qualified for free- and reduced-price lunch my entire K-12 academic career, I often feel that I am judged by middle-class white values. I do not feel that my style and approach, which is greatly shaped by the experiences that I have had and the fact that I understand how hard it is to be a first-generation college student with no family support, is valued here, because we have a set group of language that we are supposed to say in order to sound inclusive. I also feel that this assumption, that white middle-class values are the values that we should strive for, can lead to a deficit mindset about parents and about staff members who identify more with a poor community, and who, even as adults, have a hard time code-switching."

"People of color face the added challenge of fitting in a strong culture. … We are asked to bring ourselves to the work, but receive feedback on a model that does not allow for much deviation. Sometimes I feel that I must put myself aside in the execution of my job so as not to incur negative feedback. Whereas my inclination and life experience would have me strategize or interact differently with teachers, I know the feedback I receive would reinforce training that is counterintuitive to my personality or identity."

"The organization would do well to train middle management to recognize employees' strengths rather than reinforcing a standard form of function and behavior."

"Near as I can tell, [standard operating procedures], feedback structures, and programming strategies were all developed by young white women, and new hires are expected to execute all of this with fidelity. Operating procedures are centered on acknowledging diversity from a space where one is actually a nominal member of the majority group, but minority group members have no need to do that. Feedback not given in the way it has always been given is rejected, or worse, turned against the person providing it. Strategies that don't comport with the way outreach has always been done are assumed to be a waste of time. Any attempt to challenge these assumptions results in being called 'confrontational' or 'defensive.' Near as I can tell, the hiring of diverse staff is mere window dressing. Irrespective of where you come from, who you are, what you think or know … the only way to be at peace in this organization is to think and talk like a young white female. A young middle-class white female at that."

"Post onboarding it was exciting to see a large number of women, people of color, and people representing various religious, sexual, and gender identities all mingling and committed to the same vision. It was also exciting being told that they were welcome, that their identities mattered, and that the goal was that they would have a role in shaping our work."

Shifting Power Dynamics

Fundamentally, equity relates to shifting traditional power dynamics. Shifting traditional power dynamics requires asking fundamental questions such as: Who has a seat at the decision-making table? Is there a range of perspectives enriching the decision-making process? To what degree are the beneficiaries of the work shaping the work?

While we did not set out to examine power dynamics directly, the theme of power is a pervasive undercurrent. There was a frequent refrain in the Staff Experience Survey open-ended survey responses about the need for

broader decision-making input and accountability for action to improve diversity, equity, and inclusion. While accountability measures can serve as a sign of commitment and a place where actual progress is made, the survey responses demonstrate the infrequent use of these measures. The strong statements by respondents of intentions and aspirations in relationship to diversity, equity, and inclusion coupled with more limited action and accountability could be related to a lack of willingness to share power. This data suggests that creating a diverse, equitable, and inclusive environment is less about which set of technical activities an organization chooses and the sequence in which they are pursued, and more about whether the leaders of an organization are fundamentally willing to acknowledge, question, and eventually share and/or relinquish power.

When we look across the data, we see this important thread about power. In Theme 1, community input and sharing decision-making with parents, students, and community members all demonstrate ways that organizational leadership is shifting or sharing power. In Theme 2, measures of equity and inclusion demonstrate important shifts in power within an organization, such as whether employees have regular conversations about power and privilege and whether they have a voice in decision-making. And in Theme 3, organizations' good intentions backed by accountability and transparent communication signal the kinds of cultural and technical shifts needed to create an equitable organization. There is a fundamental difference between going through the motions of a "DEI playbook," even with good intentions, earnest effort and unwavering focus, versus a willingness to share power.

One more dimension connected to power shifting relates to communication practices. Controlling information flow — by maintaining non-transparent decision-making, hiring, and promotion practices, for example — is one lever for maintaining power. One possible interpretation for the strong relationship between effective communication and successfully diverse, equitable, and inclusive organizations in our data relates to explicitly addressing power dynamics. It could be that those organizations create an environment where it is safe for multiple stakeholders to give input regardless of role authority, but also where it's safe to interrupt moments of racism, name power dynamics explicitly, and call sacred organizational practices into question in service of becoming more inclusive and equitable. These are not just organizations that have adopted temporary behavioral changes after a diversity training, but ones that make fundamental cultural and structural shifts.

Power must be shared in multiple arenas, including schools sharing power with parents and students, funders sharing power with grantees, and policymakers expanding channels of input for those who are impacted by policy.

This data suggests that creating a diverse, equitable, and inclusive environment is less about which set of technical activities an organization chooses and the sequence in which they are pursued, and more about whether the leaders of an organization are fundamentally willing to acknowledge, question, and eventually share and/or relinquish power.

In our society, funders, nonprofits, and policymakers have greater prestige than people working directly with children in schools: Their staff are paid more and they often have power to exert influence on schools and districts. Our data also shows that these organizations are less diverse, equitable, and inclusive: The underrepresentation of Black, Latinx, Native American, and Asian leaders in these organizations is particularly striking. In our sample, organizations that work directly with students have about 40 percent CEOs of color, and about 40 percent have leadership teams with a majority of people of color. Over 90 percent have at least one person of color on the leadership team. On the other end of the spectrum are nonprofit organizations focused primarily on policy, advocacy, and research. Of these groups in our sample, 100 percent of the CEOs are white, 100 percent of the organizations have majority-white leadership teams, and two-thirds have all-white executive teams.

PARTICIPANT INSIGHTS

"I believe that there is a strong commitment to [diversity and inclusion] at our organization (we do not include 'equity' in our description of the work), but there is VERY LITTLE power analysis at the root of this work, which might lead to an upset of the status quo. We seem willing to add diversity so long as it doesn't fundamentally upset any of our normal ways of doing things. One of the things that seems most contradictory to me about our [diversity and inclusion] commitment is our culture around power, knowledge, and transparency at the organization — where a few key people hold almost all of the decision-making power and things are VERY tightly controlled, even when it means great ideas and personal initiative are forfeited."

"Will/can the 'old guard' of {organization} (who are our people managers) be prepared to make room for this type of change? Are they currently equipped with the appropriate mindsets, willingness, and insights necessary to do so?"

"We must reallocate power...and stop strictly attempting to work within systems that were never meant to ensure the overall safety of everyone."

SIDEBAR 3 | *White Defensiveness and Resistance in Organizations*

Resistance and defensiveness may come up when the benefits of whiteness are challenged and when structures that privilege whiteness are exposed. White people may be not only uncomfortable with shifts in the power structure but also emotionally uncomfortable with being made aware of the power structures that benefit whiteness. Robin DiAngelo describes this phenomenon in the following way: "White fragility is a state in which even a minimum amount of racial stress becomes intolerable, triggering a range of defensive moves. These moves include the outward display of emotions such as anger, fear, and guilt, and behaviors such as argumentation, silence, and leaving the stress-inducing situation."[59] The data demonstrate that it is important for white people to embrace the discomfort given the organizational benefits that are conferred for everyone when an organization is more diverse, equitable, and inclusive. For white leaders, in particular, acknowledging one's blind spots along with naming moments of defensiveness, guilt, and fragility is an important aspect of authentic leadership in a multiracial organization committed to equity and inclusion.

"Honestly, most of the conversations seem to come from a place of white guilt and are focused on unburdening oneself or convincing others how forward-thinking/accepting you are, rather than addressing structural issues that lead us to repeatedly hire white people from middle-class or higher backgrounds to work in management positions."

"I know many people of color within the organization who have been 'volun-told' to moderate conversations about race as the only person of color in the conversation."
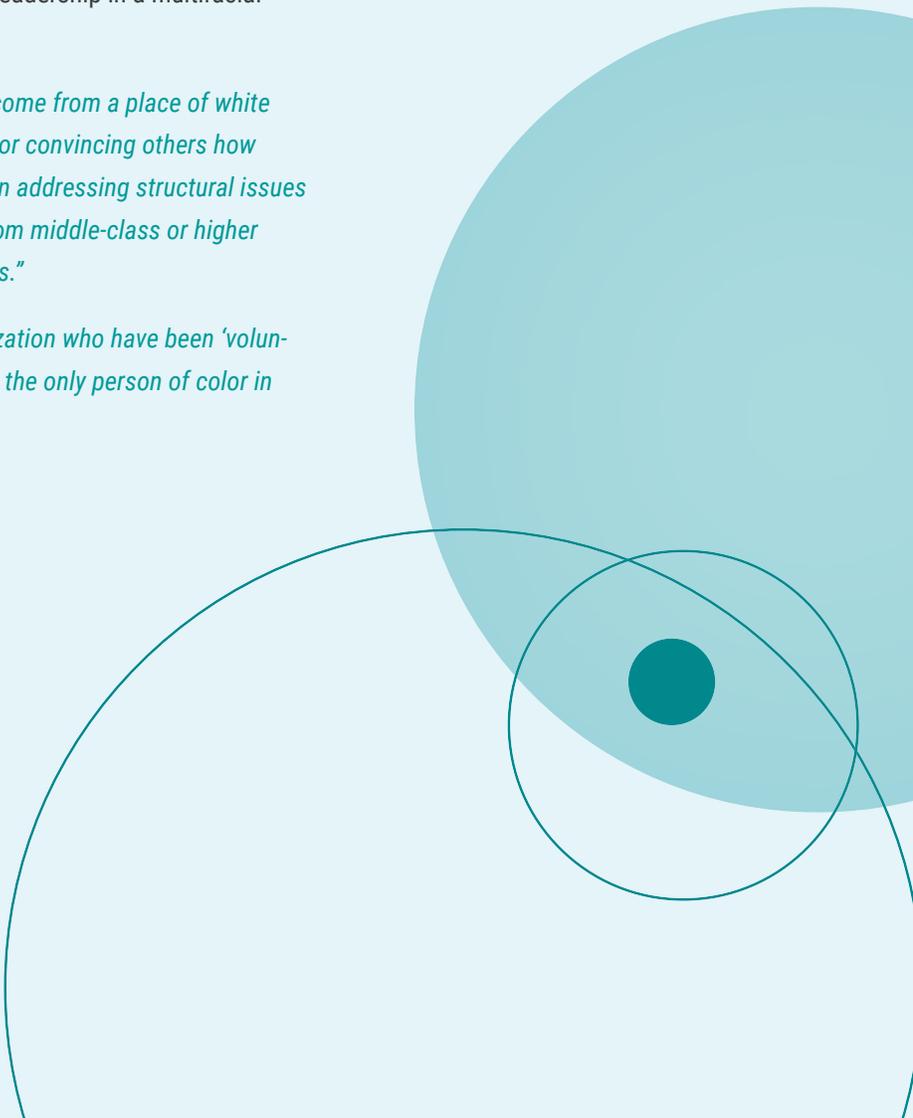
Critical Roles for Leaders

We learned that diverse, equitable, and inclusive organizations are motivated by a robust set of beliefs and live out those beliefs through policies, structures, and practices. These organizations also create a culture where leaders are modeling management commitment to diversity, equity, and inclusion values and communicating effectively.[60] In our experience, modeling means leaders are developing multicultural competence and demonstrating the vulnerability that comes with that work. This includes not knowing all the answers, experiencing discomfort, listening empathetically, letting go of preconceptions, and being open to new ways of knowing and doing. While there is no recipe or linear path for this work, the intersection of reflective leadership and effective communication with any of the diversity, equity, and inclusion practices is paramount.

As we reflect on the data alongside our team's experience working with organizations in the field on their organizational dynamics and change processes, we ask ourselves: What differentiates the organization that is checking off a list of DEI practices and yet not becoming more diverse, equitable, and inclusive? These organizations can view diversity, equity, and inclusion work as one of many competing priorities, or a workstream that can be put on hold, rather than as a value that is essential to the organization's effectiveness. We believe that the combination of shifting from assimilation to inclusion; the willingness to question and shift power dynamics; and the leadership of the board and senior leadership through modeling, communication, prioritization, and accountability are three critical levers that differentiate organizations that are superficially engaged with a "DEI playbook" from those that are making authentic progress.

The following section will explore a set of organizational profiles that arose from the data to provide organizational leaders with further information to analyze their practices and chart the path forward.

What differentiates the organization that is checking off a list of DEI practices and yet not becoming more diverse, equitable, and inclusive? These organizations can view diversity, equity, and inclusion work as one of many competing priorities, or a workstream that can be put on hold, rather than as a value that is essential to the organization's effectiveness.

ORGANIZATIONAL PROFILES
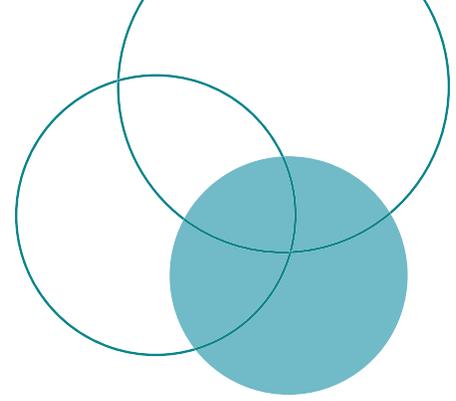
One way to make sense of the patterns, themes, and findings identified in this report is to plan how your organization can address them. To chart a path forward, it's essential for organizational leaders to understand their starting point, or where they stand in relation to progress around building a diverse, equitable, and inclusive organization. Utilizing the data from the Organizational Profile Survey and the Staff Experience Survey, we defined four basic organizational profiles based on clusters of organizations with similar diversity, equity, and inclusion scores:

- **Early Stage** (limited diversity and low on equity and inclusion)

- **Diversified** (high levels of diversity but low equity and inclusion)

- **Kindred** (equitable and inclusive but not diverse)

- **Advanced** (high on diversity, equity, and inclusion)

Figure 18 below illustrates these four profiles and how the combination of diversity, equity, and inclusion enables organizations to capture the multiple benefits described in the study. As described in Theme 2, when organizations make advancements on inclusion, represented by a shift from left to right on the horizontal axis below, they see dramatic improvements in the promoter index and staff members' intent to stay.

Further, while the high-inclusion Kindred and Advanced organizations have similar characteristics related to the promoter index and staff intent to stay, the major differentiator is diversity. Kindred organizations have homogeneous, white leadership teams. While the homogeneous majority-white staff members within Kindred organizations have strong experiences of inclusion and equity, these organizations are not gaining the myriad benefits of a diverse organization.

A deeper look into the common characteristics of each of the four organizational profiles can help leaders narrow in on the highest leverage strategies for accelerating progress.

Participating organizations received detailed reports of survey results. Examples of reports by organization profile can be viewed on the study website.

FIGURE 18 | Four Organizational Profiles

Diversified
Promoter Index
50%
Intent to Stay
36%

Advanced
Promoter Index
88%
Intent to Stay
61%

Early Stage
Promoter Index
50%
Intent to Stay
38%

Kindred
Promoter Index
87%
Intent to Stay
66%

Leadership Team Percentage People of Color

Inclusion Index Organization Mean Score

■ Low Equity ▲ Medium Equity ● High Equity
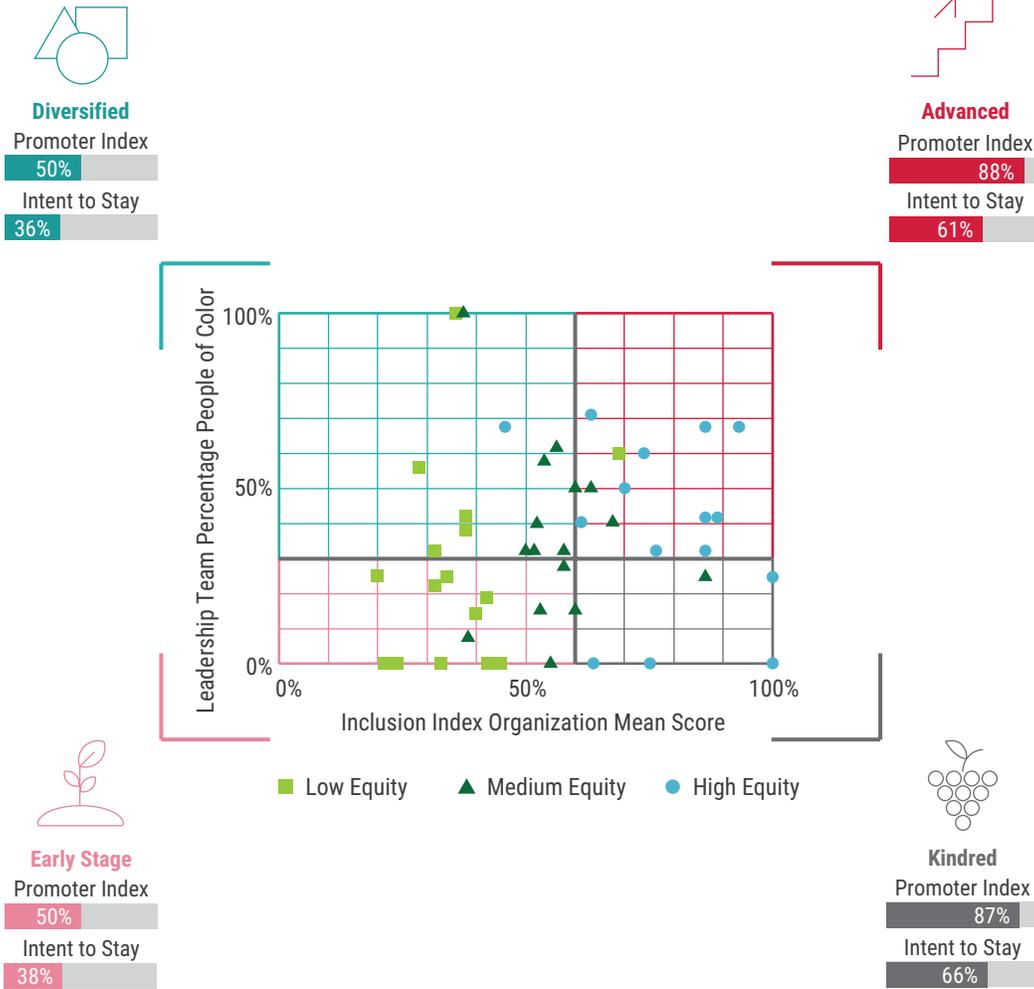
Early Stage Organizations

We find that Early Stage organizations typically have low staff and leadership demographic diversity, and staff within these organizations experience low inclusivity and low equity based on our indices. We also typically see relatively high incidences of discrimination and lower-than-average net promoter scores among organizations in this profile. While leaders and staff members in these organizations likely have good intentions, those intentions are not yet translating to higher diversity or stronger staff experiences around inclusion. These organizations are often founded and led by majority-white teams. Our data illustrates that staff within these organizations perceive that management commitment is low and that the organization is not consistently prioritizing diversity, equity, and inclusion among other competing priorities, which may explain why intention is not translating to action.

When focusing intentionally on diversity, equity, and inclusion, these organizations may face resistance or pushback in the form of statements like, "I don't even know what we mean when we refer to diversity, equity, and inclusion"; "How do diversity, equity, and inclusion help us to do our work better?"; or "We are too busy to focus on diversity, equity, and inclusion this year, maybe next year."

Organizations currently aligned with this profile should focus parallel efforts on dimensions of diversity, equity, and inclusion. These organizations should consider articulating beliefs around the

anticipated benefits of diversity, equity, and inclusion and how those benefits enable mission impact. These organizations can create a clear plan to accelerate progress using promising practices and a focused set of investments, positioning and enabling leaders to model desired behaviors. Based on our experience in the field, as these organizations make progress, they will likely see a slow (and unsteady) increase across staff perceptions of diversity, equity, and inclusion as well as increased management commitment, staff perceptions of effectiveness of DEI work, and net promoter scores. They may see a parallel slow decrease in staff witnessing and/or experiencing discrimination.

An Early Stage Organization Typically Scores as Follows:

	Lower	Higher
Diversity	▬▬	
Equity	▬▬	
Inclusion	▬▬	
Net Promoter Score	▬▬	
Intent to Stay	▬▬	
Instances of Discrimination		▬▬
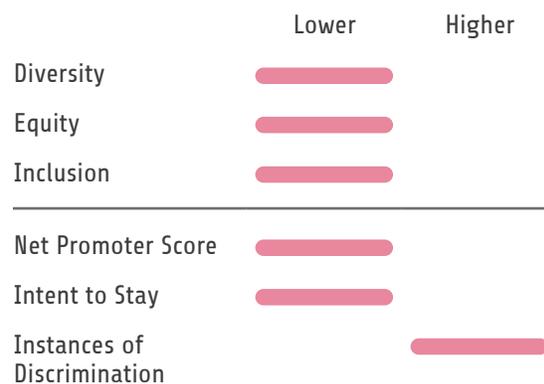
Diversified Organization

Diversified organizations typically have high staff and/or leadership demographic diversity coupled with low ratings on our inclusion and equity indices. We also typically see relatively high instances of discrimination being experienced and/or witnessed and lower-than-average net promoter scores among organizations in this profile. Our data indicates that this pattern could be driven by a culture of expectations for staff of color to assimilate to white dominant cultural norms versus a shifting of those norms. Further, our data indicates that while more leaders identify as people of color in diversified organizations, they may hold relatively lower-power positions within the organizational structure. When focusing intentionally on equity and inclusion, these organizations may face resistance or pushback in the form of beliefs such as, "We've already made great progress by hiring a diverse staff," or "We can't give any transparency into highly confidential HR processes like compensation and promotion."

Organizations currently aligned with this profile should focus their efforts on the dimensions of inclusion and equity by identifying and eliminating norms, policies, or practices that may be contributing to exclusion, or driving low engagement or high attrition; determining how power-sharing could manifest within the organization; enabling and holding leaders and staff accountable to those behaviors; and considering specific strategies like making policies related to promotion and compensation more transparent and clear to staff. Based on our experience in the field, as these organizations make progress, they will likely see a slow (and unsteady) increase across staff perceptions of diversity, equity, and inclusion as well as in management commitment, staff perceptions of effectiveness of DEI work, and net promoter score. They will see a parallel slow decrease in staff witnessing and/or experiencing discrimination.

A Diversified Organization Typically Scores as Follows:

	Lower	Higher
Diversity		▬▬
Equity	▬▬	
Inclusion	▬▬	
Net Promoter Score	▬▬	
Intent to Stay	▬▬	
Instances of Discrimination		▬▬
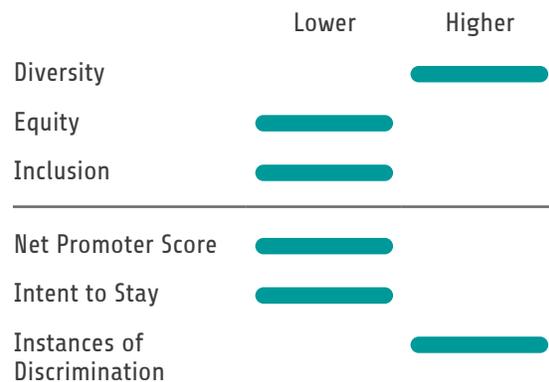
Kindred Organizations

Kindred organizations typically have low staff and leadership demographic diversity, while staff members experience strong inclusion and equity based on our indices. We also typically see relatively low incidences of discrimination and higher-than-average net promoter scores among organizations in this profile. However, these organizations are not typically realizing the myriad benefits of diversity.

Organizations currently aligned with this profile should make focused investments in diversity while closely monitoring equity and inclusion in parallel. These organizations should consider articulating what they are sacrificing by not having greater diversity and how those benefits could accelerate progress toward their mission. Pushback may come in the form of fear based on perceptions that increased diversity requires substantial trade-offs or sacrifices including, for example, the time and resource investment to intentionally diversify candidate pools. Resistance may also come in the form of requests for research and data to demonstrate the connection between increased diversity and organizational effectiveness or student outcomes; mental models that create a false dichotomy between maintaining high quality and hiring diverse staff or prospects; or pitting diversity, equity, and inclusion efforts against mission impact.

Based on our experience in the field, as these organizations make progress on demographic diversity, they can first expect to see a decrease in staff perceptions of inclusion and equity. These may be associated with a decrease in staff satisfaction, increased conflict, and/or an increase in incidences of discrimination before a subsequent increase in staff satisfaction.

A Kindred Organization Typically Scores as Follows:

	Lower	Higher
Diversity	▰	
Equity		▰
Inclusion		▰
Net Promoter Score		▰
Intent to Stay		▰
Instances of Discrimination	▰	
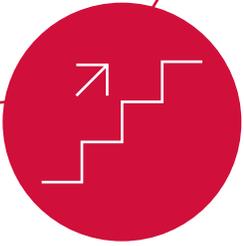
Advanced Organizations

We find that Advanced organizations typically have high staff and leadership demographic diversity and that those staff members are experiencing strong inclusion and equity based on our indices. We also typically see relatively low instances of discrimination (directly experienced and/or witnessed), and above-average net promoter scores among organizations in this profile. These are often organizations being led by a founding leader or team that made diversity, equity, and inclusion the norm by building promising practices into their organizational culture and behaviors from the outset. That said, these organizations may lack clear, documented policies and accountability processes, which could threaten the sustainability of this success, especially through organizational development inflection points like rapid growth or transitions of founding team or senior leadership team members.

When focusing intentionally on diversity, equity, and inclusion, these organizations may face resistance or push back in the form of beliefs like "We don't need a written policy for everything, it's in our DNA" or "We have done this diversity, equity, and inclusion work already and it is working, why is this still a priority among all of our other pressing priorities?"

Organizations currently aligned with this profile can focus on the dimension of equity as well as specific efforts to sustain strong diversity, inclusion, and equity by documenting and codifying the approaches that have led to success from the outset. For example, we found that many Advanced organizations have not documented their definitions of diversity, equity, or inclusion or made transparent and explicit why they believe diversity, equity, and inclusion matter within

their organizational context. These organizations can focus on creating or strengthening feedback loops to learn and regularly refine approaches to diversity, equity, and inclusion.

Finally, these organizations can focus on creating multilevel and multidirectional data gathering, monitoring, and accountability (e.g., among board, leadership, and staff) for the practices they believe to be the most influential drivers of strong diversity, equity, and inclusion. Based on our experience in the field with these efforts, as these organizations progress they can expect to see sustained high scores across diversity, equity, and inclusion and maximize the benefits of an organization that is high in all three areas.

An Advanced Organization Typically Scores as Follows:

	Lower	Higher
Diversity		▬▬
Equity		▬▬
Inclusion		▬▬
Net Promoter Score		▬▬
Intent to Stay		▬▬
Instances of Discrimination	▬▬	

SIDEBAR 4 | A Snapshot of Staff Perception in an Advanced Organization

PARTICIPANT INSIGHTS

"I would place [org] in the top 1 percent of organizations I've worked at with respect to Diversity, Equity, and Inclusion. The organization is truly setting a new standard for what it means to equip people who are impacted by oppressive systems to uproot those systems."

This staff member's positive assessment of organizational diversity, equity, and inclusion provided an interesting opportunity to test the degree to which the actual measures confirmed the staff member's perception. We examined the data from this staff member's organization and found that it aligns with the staff member's perception. The organization's profile is "advanced," with a leadership team that is two-thirds people of color and where three-quarters of staff members identify as people of color. The organization scores in the top quartile of the equity and inclusion indices, has 100 percent intent to stay among historically marginalized groups, and has a 100 percent promoter index. This anecdote demonstrates that staff members take notice when organizations are diverse, equitable, and inclusive.

Depending on which profile an organization most closely aligns with today, they may need to focus on advancing several or all dimensions of diversity, equity, and/or inclusion. By examining the relative strengths of other organizations that emerged through our study, we identified promising practices and qualities that might be holding organizations back to help leaders accelerate progress (see Figure 19 on the next page). It is important to remember that these practices should not be interpreted as a checklist. Key aspects of adaptive leadership — such as the orientation and communication patterns of the leaders, and the organization's culture, history, and context — all influence the path that an organization takes.

Depending on which profile an organization most closely aligns with today, they may need to focus on advancing several or all dimensions of diversity, equity, and/or inclusion.

FIGURE 19 | Promising Practices to Enable Accelerated Progress

Dimension	Organizations strong in this area…	What might be holding an organization back in this area…
Diversity	• Are diverse across multiple dimensions, including race/ethnicity and other lines of identity • Value stakeholder voices by seeking a range of internal and external perspectives on diversity, equity, and inclusion efforts as well as organizational strategy/operations and critical decision-making • Develop recruiting practices designed to attract leaders of color • Are action-oriented and do not always need a written policy in place before executing on a DEI practice or initiative • Are less likely to engage in internal work planning to advance DEI • Invest in their staff, particularly staff of color, through the creation of formal coaching programs and other career development opportunities	• Failure to address selection bias in recruiting and hiring practices and/or reliance on white dominant pipelines for recruitment • Failure to hire people of color at the leadership level or no intentional focus on developing junior staff of color to assume leadership roles • Focus on diversity without corresponding attention to inclusion and equity, which may signal tokenism or an expectation that staff of color assimilate to a white dominant culture • Blindness to or denial of retention issues resulting from lack of equity and inclusion • Structures and conversations that are intended to provide "safe spaces" for staff of color but actually further isolate them from the broader culture
Equity	• Share power through engagement-focused approaches to communication and decision-making (even when in tension with speed or process efficiency) • Institute checks and balances to ensure fair processes and equal access to opportunity, particularly in talent processes related to recruitment, hiring, compensation, and career advancement	• Lack of definition, measurement, or conversations about equity • Belief that equitable outcomes and merit-based outcomes are in conflict • Instances of discrimination • Turnover of people of color influenced by lack of diversity, equity, and inclusion
Inclusion	• Signal inclusion through engagement-focused approaches to decision-making (even when in tension with speed or efficiency) and talent processes • Demonstrate inclusion through communication: free and open expression; frequent conversations about power, privilege, race, and ethnicity; strong communication from leadership; and authentic desire by leadership to hear from staff • Break down barriers to inclusion by spotting and disrupting instances of exclusion or marginalizing behaviors or language	• Instances of discrimination • Staff who report that turnover of people of color is influenced by lack of diversity, equity, and inclusion • Salience of racial/ethnic identity to many people of color is ignored by traditional white power structures

In addition to focusing on specific dimensions of diversity, equity, and/or inclusion, our data points to other areas that all organizations, regardless of profile, can focus on to accelerate progress. We explore those in Appendix B on page 81.

Organizations must not only determine their tailored path forward given their current profile, they must also determine the appropriate pace for organizational change. Based on our work in the field, we see two distinct approaches to advancing progress on organizational diversity, equity, and inclusion:

An **evolutionary journey** involves incremental steps. Organizations on this journey often focus their diversity, equity, and inclusion efforts on a specific talent process or activity, crafting a strategic sequence of efforts over time. Organizations may rely on external support to supplement skills or bandwidth within the organization necessary to enhance diversity, equity, and inclusion. Organizations might consider this journey if they are part of a complex system with few degrees of freedom to enact transformational change; if they are in the midst of other substantial change initiatives or an organizational development inflection point requiring substantial dedicated resources and attention; or if they already have strong diversity, equity, and inclusion and want to focus on ensuring durability and sustainability.

A **revolutionary journey** involves broader, deeper leaps forward. Organizations on this journey seek to advance broad diversity, equity, and inclusion efforts simultaneously while engaging in the deep work of transforming leadership mindsets and organizational culture to significantly disrupt entrenched norms and organizational values at odds with this work. Organizations might consider this journey if they recognize that incremental shifts are insufficient and possess a strong foundation of communication, relational trust, and bold leadership support for forward progress.

Organizations must not only determine their tailored path forward given their current profile, they must also determine the appropriate pace for organizational change.

CHARTING THE PATH FORWARD

We have a long way to go until organizations working toward educational equity are themselves diverse, inclusive, and equitable. Yet to accelerate the pace and effectiveness of our efforts — and because children's access to an excellent education hangs in the balance — we must get there.

In this section, we surface some high-level promising practices focused on three distinct audiences: organizational leaders, funders, and board members. While these cannot be treated as a simple checklist, the suggestions lay the foundation for change in organizations and across the sector.

Organizational Leaders

Approximately half of the organizational leaders in the Organizational Profile Survey are not employing practices to advance diversity, equity, and inclusion in their organizations and others are utilizing a limited number of these practices. To accelerate progress, organizational leaders can:

- **Deliberately shift DEI from one of many priorities to an organizational imperative.** Resist the either/or thinking that pits investments in diversity, equity, and inclusion against a focus on children. Instead, help others to understand that becoming a diverse, equitable, and inclusive organization is an imperative for education organizations to realize the full impact of their missions. Engage staff members and leaders across your organization in determining what diversity, equity, and inclusion mean to your team and what specific role each concept plays in enabling your organization to reach its mission.

- **Find and engage a committed group of thought partners** who have a mix of positional authority and experiences from different vantage points. Ensure that historically marginalized people have a seat at the table with authentic voice and power. Leverage diverse perspectives and commit to creating a common vision for the future — what would a truly diverse, inclusive, and equitable organization look like, feel like, and act like.

- **Invest resources to support implementation.** Remember that a strong plan — even when informed by a variety of perspectives — will not succeed without an investment of leadership attention and resources to bring that plan to life. Reinforce your careful planning with appropriate investments of time and money. Engage in the

capacity-building work that will enable successful implementation of the plan: build racial literacy and multicultural competence as well as authentic cross-racial relationships.

- **Monitor progress.** With staff, board members, and community members, co-create and share your goals; the rationale for choosing those focus areas; and how you will monitor progress. Collect baseline data on your demographics, staff experience, and the structures and policies intended to create an inclusive and equitable environment. Collect equity outcome data. Disaggregate data by identity groups to shed more light on staff experience. Look at the intersections of other marginalized identities, such as gender and sexual orientation, with the race/ethnicity data in your analysis. Set ambitious but achievable outcome measures and determine which performance indicators you'll use to monitor progress. Ensure that board and senior staff members are accountable for progress.

Funders

Funders are currently among the least diverse organization types, with 74 percent of funder executive team members in our sample identifying as white. Foundation leaders are uniquely positioned to accelerate progress on diversity, equity, and inclusion across the field. Here are things foundation leaders can do:

- **Practice diversity, equity, and inclusion internally.** Examine your board structures, systems, practices, and racial/ethnic composition. Make a plan to accelerate your internal progress toward becoming a diverse, inclusive, and equitable organization.

- **Leverage your position to advance diversity, equity, and inclusion through new funding opportunities.** Utilize the power, influence, and privilege that come with grant making to support leaders who represent the communities served. Seek out new thinkers and innovators versus exclusively funding leaders from known networks. Consider shifts to decrease the barriers to entry for new entrepreneurs. Expand the ways that proposals are presented and ideas are evaluated to allow for innovation and diverse thinkers. Provide capacity-building support for entrepreneurs from underrepresented backgrounds to launch their ideas.

- **Hold grantees accountable for making progress on DEI.** Hold grantees accountable to high standards around creating inclusive and equitable environments where a diverse group of adults can thrive to generate maximum impact for students. Encourage organizations to collect robust demographic data and inclusion and equity measures from multiple perspectives.

- **Fund field-level research, data collection, and learning efforts** to build on our common understanding of challenges and promising practices. Participate in joint efforts that align efforts and support a holistic understanding of the field. Systemic data gaps are a fundamental issue that you are well positioned to address.

Board Members

Board members are an important group with unrealized potential to help advance progress on organizational diversity, equity, and inclusion. The combination of positional authority, strategic influence, and connection to communities and networks outside of the organization make boards of directors a critical area of focus for diversity, equity, and inclusion. Here are things board members can do:

- **Be intentional about board composition** beyond checking boxes. Dedicate board seats to ensure a range of viewpoints and backgrounds are represented (e.g., board members from the communities served). Also be willing to reconsider existing board expectations (e.g., minimum annual giving requirements), length of service (consider term limits to open seats more frequently), and size guidelines (add seats to the board) in the interest of authentically diversifying the board. Recognize that diversifying a board requires careful attention to inclusiveness and equity so that the same power dynamics in organizations and society more broadly are not replicated within board dynamics.

- **Invest in board development to "be the change."** Work with your organization to establish a clear vision for diversity, equity, and inclusion within the organization and within the board as an extension of the organization. Build knowledge, shared language and commitment and empathy by investing time and resources to engage in discussion, reading, and training to advance diversity, equity, and inclusion. Create the time to develop authentic connections among the board, the staff, and the communities being served. If you're going to invest in a diversity, equity, and inclusion board committee, ensure its efforts are focused on driving impact in the organization's areas of highest need as well as examining the board's DEI practices.

- **Focus on the board's role in hiring the chief executive.** Prioritize hiring CEOs from historically marginalized backgrounds and from the communities served by the organization. Access new networks for talent. Press pause on a search if it is not generating a diverse pool of high-quality candidates and invest additional resources and time to broaden the pool. Work with the hiring committee to identify potential areas of implicit bias in the hiring process. Get clear on the range of competencies that will make a leader effective in the position, including building and sustaining authentic relationships, soliciting a range of perspectives to inform the work, managing

across lines of difference, and possessing a growth mindset and humility. Ensure that the leader can demonstrate how they will advance the organization's work on diversity, equity, and inclusion in service of the mission.

- **Focus on the board's role in accountability.** Hold your organization accountable for collecting data and achieving results in building a more equitable and inclusive environment. Ensure that a range of diversity, equity, and inclusion measures, including staff experience data, are part of the board's evaluation of the chief executive and the board's evaluation of its own effectiveness.

While this study contributes to the evolving research agenda related to diversity, equity, and inclusion in the education sector, a number of critical research questions are outside the scope of this project. These include: the current demographics and lived experiences of staff who identify with other marginalized identities outside of race/ethnicity; the impact of intersectionality between marginalized identities (such as gender identity *and* sexual identity or race/ethnicity *and* socioeconomic status);[61] and the longitudinal effectiveness of various strategies employed by organizations to deepen progress on diversity, equity, and inclusion. We hope this work spurs further research that will build on what we have learned, accelerate the development of additional measurement tools, and provide more opportunities to demonstrate the links between diversity, equity, and inclusion practices within organizations and student outcomes and success.

Further, our strong hope is that this study inspires our colleagues within education organizations of all types to commit to diversity, equity, and inclusion as a source of unrealized impact and an organizational imperative.

Further, our strong hope is that this study inspires our colleagues within education organizations of all types to commit to diversity, equity, and inclusion as **a source of unrealized impact and an organizational imperative**. It is time to accelerate our collective progress by shifting to action; improving our sector's ability to attract and retain diverse talent; operating from a place of hope rather than despair or fear; and moving forward with the conviction that diversity, equity, and inclusion are essential ingredients to achieve educational equity and excellence for all students.
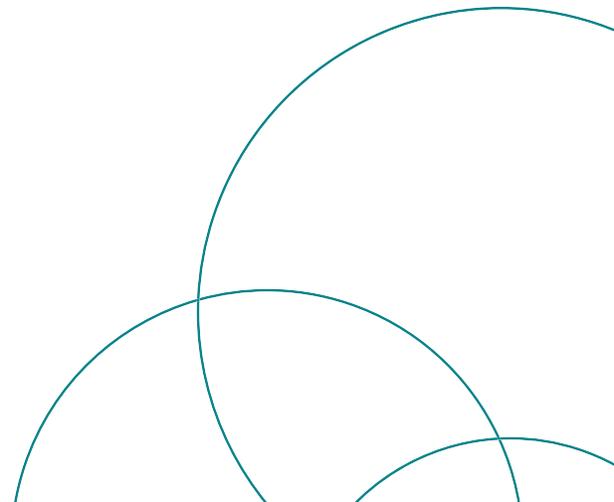
APPENDIX A: DETAILED METHODOLOGY

The study reflects survey responses gleaned between November 2016 and March 2017 from over 200 organizations and nearly 5,000 individuals. Two instruments were designed to inform our primary questions for this study:

- The **Organizational Profile Survey** collected data on organizational demographics and diversity, equity, and inclusion practices. One individual (typically a senior leader) responded to this survey on behalf of the participating organization.

- The **Staff Experience Survey** collected staff perceptions of the effectiveness of diversity, equity, and inclusion efforts. Organizations that participated in the Organizational Profile Survey had the option to participate in the Staff Experience Survey.

Survey design was informed by a review of previous research on diversity, equity, and inclusion and organizational effectiveness within the education and other sectors, and the survey instruments related to these efforts.

In addition, the study utilized an exploratory methodology to contribute to understanding the linkages between organizational diversity, equity, and inclusion and student success.

Procedures and Respondents

The population for this study includes organizations across the U.S. education sector: public and private schools, school districts and charter management organizations, organizations — typically nonprofit — that provide support to the sector, organizations that sell education-related products and services — including most EdTech firms, policy and research organizations, a variety of funders and investors, and others.

The **Organizational Profile Survey** launched in November and December 2016 and was sent via email to over **1,500** organizations. In addition, links were posted in select newsletters and blogs in December 2016 and January 2017. The email distribution list of leaders within the target population of organizations was derived from a variety of sources: directories of public school organizations, sector newsletter distribution lists, education conference attendee lists, grantee lists from our funding partners, and clients and personal contacts from project staff. The lists included a wide mix of organization types and sizes and included organizations from across the country. The survey designers do not believe that these lists reflect any implicit bias with respect to particular views or priorities on topics covered in the surveys. See Figure I below for a breakdown of respondents by organization type, size, and region.

213 responses were received (as of April 2017) and are reflected in this report. This represents a response rate of about 10 percent (the response rate to the email invitations was 10.3 percent; it is not possible to calculate a response rate for the links that were posted online).

FIGURE A1 | Respondents to Organizational Profile Survey, by Type, Size, and Region

Type

Size

Region

- District/Traditional Public School
- Charter Management Organization/ Charter School
- Education Products and Services
- Education Support Organization
- Funder, Donor, or Investor
- Other

- 0-20 Staff Members
- 21-100 Staff Members
- 100+ Staff Members

- Northeast
- South
- Midwest
- West
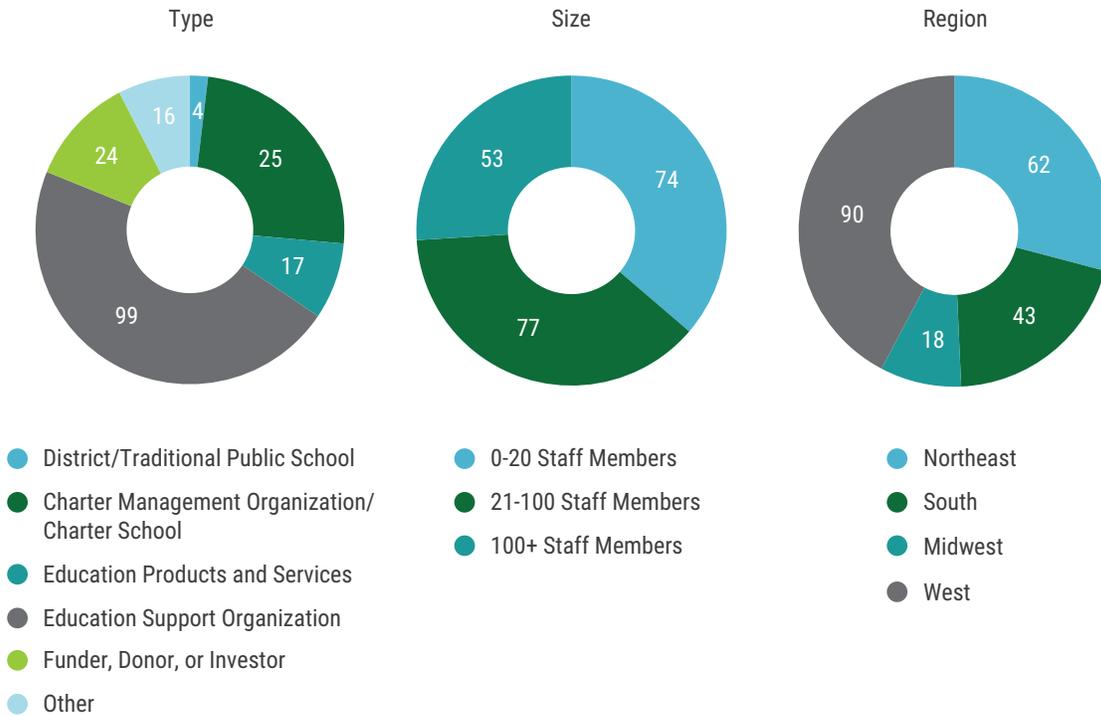
Source: Organizational Profile Survey

There are some notable characteristics of the 213 responding organizations within our study sample. In relation to publicly available data on the education sector, our sample is underrepresented by traditional public schools and districts and by organizations located in the South and Midwest (as opposed to the West and Northeast). Consistent with these characteristics, our sample is composed of a lower ratio of white respondents than is true of the field at-large. Given the strong participation of CMOs and charter schools, which, like districts and traditional public schools, have more proximal relationships with students, we feel confident that educator voices are represented in our data. Nevertheless, it is possible that leaders and educators have different lenses on DEI and its connection to student success across

these two kinds of organizations. Similarly, there may be nuances to how valued and effective DEI efforts are in organizations located in the South and the Midwest, which have their own cultural attributes. As such, we anticipate bolstering our future efforts to capture full representation across organization types and locations in future studies.

Leaders that opted to participate in the follow-up **Staff Experience Survey** emailed the survey to their staff members from December 2016 through March 2017. The **4,912** responses from staff members across 71 organizations we received during that time frame are included in this report. The average response rate to this survey across these 71 organizations was 70 percent.

FIGURE A2 | Staff Experience Survey Participating Organizations by Type, Size, and Region

Type

- 0
- 9
- 15
- 7
- 3
- 26

Size

- 17
- 15
- 28

Region

- 29
- 16
- 13
- 2

Type
- ● District/Traditional Public School
- ● Charter Management Organization/ Charter School
- ● Education Products and Services
- ● Education Support Organization
- ● Funder, Donor, or Investor
- ● Other

Size
- ● 0-20 Staff Members
- ● 21-100 Staff Members
- ● 100+ Staff Members

Region
- ● Northeast
- ● South
- ● Midwest
- ● West
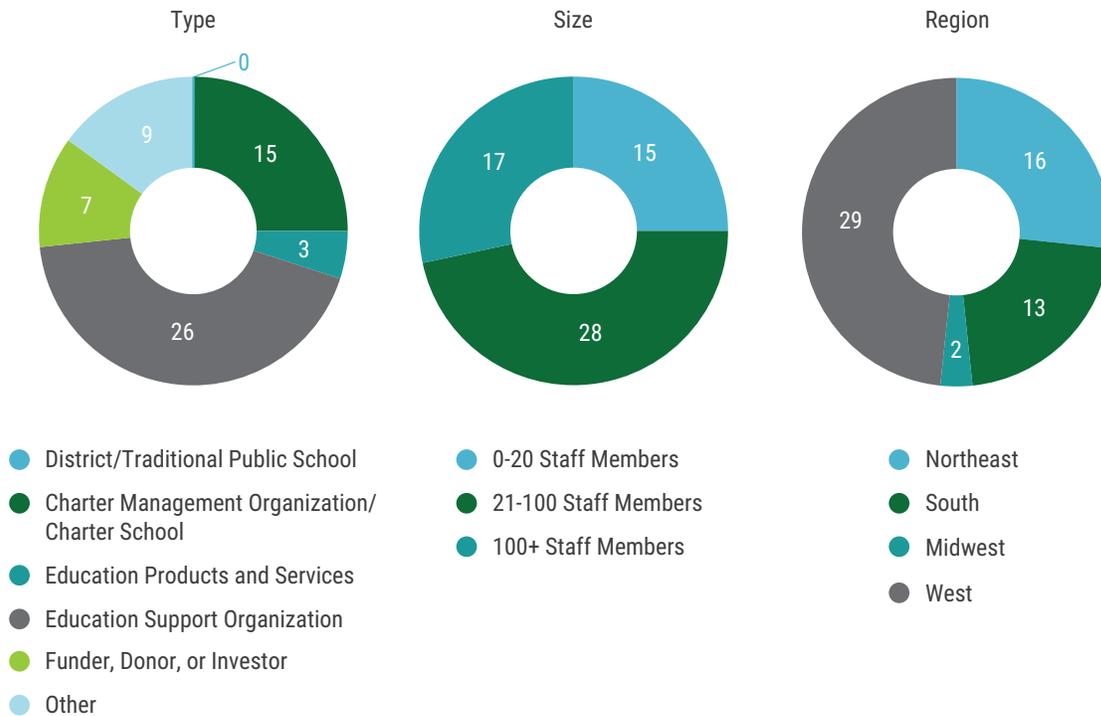
Source: Staff Experience Survey

One-third of the organizations that participated in the Organizational Profile Survey opted to also participate in the Staff Experience Survey (and two-thirds did not). We did not find that there were very different characteristics (e.g., organization type, staff demographics) between those organizations that opted in to the Staff Experience Survey and those that opted out. The few school districts in our sample indicated that they were not able to meet the time constraints for administering the Staff Experience Survey and did not participate. We also compared the racial/ethnic breakdowns of staff as reported in the Organizational Profile Survey with self-reported race/ethnic identity by respondents in the Staff Experience Survey. Response rates across subgroups were consistent between the two surveys.

We want to acknowledge that any self-response survey, even one as large as this, can be subject to response bias. Respondents may be more inclined to complete, or not complete, a survey or particular questions based on a variety of attributes that would bear on the results but are challenging to anticipate, and hence control for, in our analyses.

Although we feel these findings are relevant and a significant contribution to the knowledge base, they do not represent a random sample of our targeted population. Rather, they represent the views and experiences of the people and organizations that elected to participate in the survey.

Instrument Design

The basic research questions addressed by the two primary surveys in this study are:

1. What are the racial and socioeconomic demographics of staff, leadership, and boards in education organizations?

2. What are the policies and practices that education organizations employ in relation to diversity, equity, and inclusion?

3. What are staff perceptions of diversity, equity, and inclusion in their organizations and of related practices?

4. What are the perceived links between organizational diversity, equity, and inclusion and student success?

The survey tools were developed in two stages. First, we conducted a review of eight similar survey instruments — in and out of the education sector — and examined the topics covered; survey length, style, and tone; target respondent profiles; and data types. We evaluated over 300 questions from these surveys as we built the two instruments we would use in our study.

We then conducted an intensive collaborative design exercise involving the core working team and an advisory group of approximately 30 experts that included DEI specialists, nonprofit leaders, teachers, and principals. This exercise enabled us to validate assumptions and further develop the instruments. Our design team represented a diversity of race, expertise, perspective, gender, and age. We leveraged this diversity combined with high-trust relationships to identify each other's blind spots and note how particular audiences might relate to the data or experience the findings. In our feedback, we aimed to practice the kind of transparent, authentic, and humble communication that leads to deepening understanding across difference for better insights.

In keeping with their different purposes, each survey tool had some distinct design characteristics:

- The **Organizational Profile Survey** is comprised of just over 100 questions of three types: questions related to organizational demographics, prompts for endorsing DEI practices (e.g., data tracked, policies and practices employed), and write-in responses to capture sample definitions and policy statements. The target response time was under 30 minutes (actual mean time was 28 minutes). The survey was confidential (i.e., individual organization responses were only seen by the survey administrator and shared back only to the respondent organization) but not anonymous. Aggregate data is shown in this report and was used for benchmarking in participant reports.

- The **Staff Experience Survey** contains 80 questions, most of which use a 5-point Likert scale: Strongly agree, Somewhat agree, Neither agree nor disagree, Somewhat disagree, and Strongly disagree. In addition, a demographics section at the end of the survey asks for optional self-identity with race/ethnicity categories, gender, sexual orientation, socioeconomic

background, and others. We also invited respondents to comment about DEI in their organizations or about the study, and we received over 1,350 comments. The target response time was under 15 minutes (actual mean time was 14 minutes). The survey was anonymous and individual responses were not shared with anyone other than the survey administrator. Aggregate data is shown in this report and was used for benchmarking in participant reports.

In our efforts to capture demographic information, we chose the **Race/Ethnicity categories** with great care and deliberation, recognizing that race is a social construct and that survey questions that ask respondents to check boxes are inherently reductionist. We selected the six categories shown below because we felt they were most consistent with de facto standards (National Center for Education Statistics reports, U.S. Census proposals, and others) and would best meet our needs to collect comparable data at scale:

- **American Indian, Native American, or Alaskan Native** (e.g., Aztec, Blackfeet Tribe, Mayan, Navajo Nation, Nome Eskimo Community, etc.)

- **Asian, Native Hawaiian, or Pacific Islander** (e.g., Asian Indian, Chamorro, Chinese, Fijian, Filipino, Japanese, Korean, Marshallese, Samoan, Tongan, Vietnamese, etc.)

- **Black or African American** (e.g., Ethiopian, Haitian, Jamaican, Nigerian, Somalian, etc.)

- **Latino or Hispanic** (e.g., Colombian, Dominican, Mexican, Peruvian, Puerto Rican, etc.)

- **White** (e.g., Algerian, Egyptian, English, French, German, Iranian, Irish, Italian, Lebanese, Moroccan, Polish, Syrian, etc.)

- **Multiple or some other** race, ethnicity, or origin

In the Staff Experience Survey, prior to presenting the above list of categories, we asked respondents to describe their racial/ethnic identity in a free-text field. We then compared those responses to the list of categories the same respondents subsequently selected. Over 90 percent of the respondent-coded answers were a synonymous match with one of the categories. Most of the others were either a more specific variation (e.g., South Asian or Central American) or a combination of a category and a religion (e.g., White and Jewish).

Data Analysis

The Organizational Profile Survey responses are mostly either numeric values or Yes/No choices, so the coding and tabulations are fairly simple. We analyzed responses at the organization, organization type, and field levels, and also looked at how practices varied by size of the organization and the racial/ethnic composition of the staff, the CEO, and the leadership teams.

The Staff Experience survey added significant richness and depth to the data set:

- We were able to collect demographic and other data not widely held by participating organizations (e.g., socioeconomic background, sexual orientation, intent to stay with the organization or in the sector).

- The list of questions allowed us to construct indices to assess the level of inclusion and perceived equity at the organization level. These data elements are not consistently defined or widely tracked among sector organizations.

- Cross-survey tabulations enabled us to assess correlations between reported practices on the Organizational Profile Survey with staff ratings on the Staff Experience Survey as well as the relationships between CEO and respondent race/ethnicity or gender.

This report typically aggregates and reports responses to the Likert-scale questions as "% positive" (i.e., either "Somewhat agree" or "Strongly agree"), and most often aggregates and reports the index scores as above or below the sample population mean. When we feel a need to draw a sharper contrast, we instead show top/bottom quartile comparisons — when this is the case, it is clearly labeled. The light green/dark green/blue scale used to show Equity Index scores on the quadrant charts are simply three evenly distributed groups across the organizations plotted on the chart.

We found two types of visualizations to be effective in explaining select data views:

- "Gap analysis" charts make side-by-side comparisons of how two comparable groups answered the same questions. Charts typically show the five questions where Group 1's scores exceeded Group 2's scores by the largest gap, and five questions where the reverse was true.

- Two- and three-factor analysis charts allow deeper exploration of data relationships, e.g., *"How do Intent to Stay scores vary by race/ethnicity in organizations with more or less diversity in their leadership teams?"*

Linking Workforce Diversity, Equity, and Inclusion to Student Success

While the primary focus in this study is to better understand internal organizational work on diversity, equity, and inclusion and implications for the talent in the organization, there is great and justified interest in understanding the links between diversity, equity, and inclusion and student outcomes. One of the most common questions that we field is "Are the organizations that are diverse, equitable, and inclusive getting better results for students?" Given the early stages of this body of work, traditional statistical modeling that might link internal, organizational work on diversity, equity, and inclusion (or "workforce DEI") and student learning outcomes is not feasible. The measures on either end of the chain — workforce DEI and student success — are not universally defined much less quantified, and existing metrics are not consistent across the participant organizations. Furthermore, a number of the organizations participating in the study are not directly impacting student learning, but rather impacting schools through programs, products, services, policies, and funding. Doing the research to isolate the variables that directly influence student achievement in this chain and draw causal links between workforce diversity, equity, and inclusion and student outcomes would require significant resources, time, and collaboration. Some statistical experts would argue that it is impossible to draw direct, causal linkages between, for example, the levels of workforce diversity, equity, and inclusion within a nonprofit service provider, a funder, or the central office of a school operator and student achievement. At the same time, we were not ready to give up on contributing to the knowledge base about the linkages where feasible. We felt that a simple opinion poll would not give us the credibility or depth of insight we wanted. As a result, we designed an exploratory methodology that was feasible, rigorous,

and credible using a combination of existing research and field-level observations to explore what the primary lines of impact might be.

First, we drafted a flow diagram to illustrate how the work of the organizations in our study is directly or indirectly related to improving student success. We drew on existing research and logic models related to organizational diversity, equity, and inclusion, and supplemented this with new data from our surveys. Finally, we adapted a research methodology called Most Significant Change, which is a hybrid qualitative/quantitative method that draws on field-level inputs and domain experts to identify the most significant lines of impact between two variables.[62]

For this latter analysis, we sent out an email to the original list of 1,500 senior leaders across the sector inviting them to contribute their best thinking around the following core question:

"What would you say is the single most significant way that student outcomes are positively impacted when your organization is diverse, inclusive, and equitable?"

We analyzed the data from the approximately 100 leaders and other experts from across the field who responded, then processed the responses through a series of categorization filters in order to identify the six themes shown in this report. Given the nascent state of research on this issue, we relied on a combination of established technique and expert judgment to produce findings that provide new insights and, we expect, will inspire future investigation.

FIGURE A3 | Impact Assessment Respondents, by Organization Type

Type

- District/Traditional Public School
- Charter Management Organization/ Charter School
- Education Products and Services
- Education Support Organization
- Funder, Donor, or Investor
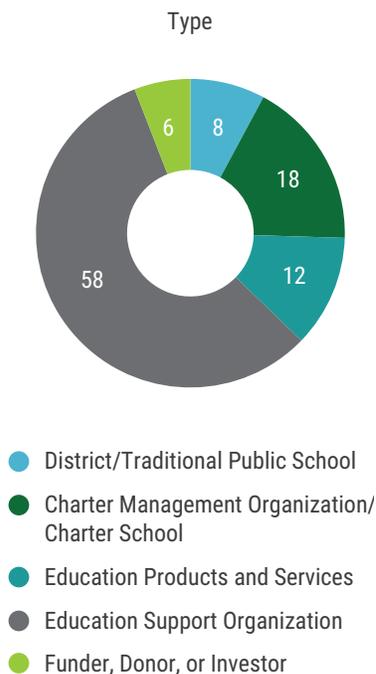
Source: Study of Linkages Between Organizational DEI and Student Success

APPENDIX B: ADDITIONAL DEI STRATEGIES AND COMMON PITFALLS

In addition to focusing on specific dimensions of diversity, equity, and/or inclusion, our data points to other areas that all organizations, regardless of profile, can focus on to accelerate progress:

FIGURE B1 | DEI Strategies and Common Pitfalls

Lever	Strategies	Common Pitfalls
Demonstrating that diversity, equity, and inclusion are valued	• Identify and articulate beliefs around the benefits of diversity, equity, and inclusion and its relevance in organization context • Rely on diverse perspectives and channels to build understanding • Foster broad participation in and clear and consistent accountability for diversity, equity, and inclusion across the organization	• Consideration of diversity, equity, and inclusion as a "people of color" issue rather than a core commitment/ priority for all • Perception of one-dimensional benefits of diversity, equity, and inclusion, likely tied to compliance and increasing staff demographic diversity • Engagement with stakeholders limited to providing information without authentically seeking input or feedback for two-way communication • Existence of processes to collect input from external stakeholders, but lack of consistent follow-through
Demonstrating management commitment	• Make DEI beliefs and expectations explicit for staff through policies and official statements • Don't stop at "words" on paper, but back up beliefs with "action" • Prioritize diversity, equity, and inclusion amid other pressing priorities • Hold staff and leadership accountable for advancing diversity, equity, and inclusion and modeling values in alignment with this work	• Treatment of diversity, equity, and inclusion as a "nice to have" or in tension with work toward mission versus mission-critical • Lack of proactive and effective response to discrimination • Perpetuation of a culture that excludes or isolates staff from marginalized backgrounds • Letting attrition of staff of color — potentially driven by lack of diversity, equity, and inclusion — go unaddressed
Increasing effectiveness of DEI efforts	• Seek out and value internal and external perspectives related to diversity, equity, and inclusion • Facilitate progress and promote accountability by tracking, measuring, and reporting the effectiveness of diversity, equity, and inclusion efforts directly and transparently	• Narrow or inconsistent approach to soliciting input or advancing diversity, equity, and inclusion • Lack of prioritization of diversity, equity, and inclusion amid other organizational priorities • Creation of structures and processes, but falling short on execution and impact

ACKNOWLEDGMENTS

ABOUT THE AUTHORS

Xiomara Padamsee

Xiomara Padamsee is the founder and CEO of Promise54 and formerly led the Talent Advising practice as a partner and member of the management team at Bellwether Education Partners. Xiomara has been working in education reform and human capital for 20 years. Before joining Bellwether, Xiomara was a leader in Deloitte Consulting's Human Capital consulting group where she specialized in transformational strategic change, culture, and working cross-culturally. Earlier in her career, Xiomara worked as a member of the management team and vice president of staffing and organizational development with Teach For America, where she founded the organization's first human assets team, fueling a four-fold national expansion in five years with increased staff diversity, satisfaction, effectiveness, and retention. Prior to her work with the national office, Xiomara served as a corps member, teaching bilingual elementary school in the South Bronx, and as a program director supporting teachers in Newark, Paterson, and Jersey City to succeed. She can be reached at xiomara@promise54.org.

Becky Crowe

Becky Crowe is a senior adviser at Bellwether Education Partners and co-founder of Bellwether's Talent Advising practice. Becky has worked on a range of strategy and human capital projects related to diversity, equity, and inclusion. She has spent more than 20 years pursuing educational equity through her efforts as a social entrepreneur and organizational leader at the Bay Area School Reform Collaborative and Partners in School Innovation, a researcher at Stanford University's Center for Research on the Context of Teaching, and an education strategy and philanthropy adviser. She can be reached at RebeccaCroweConsulting@gmail.com.

ADVISORY PANEL
by Angela Cobb

From the beginning, the Bellwether project team and Foundation Working Group recognized that this research needed to be informed by and grounded in perspectives from the field. To facilitate a feedback loop throughout the project, we engaged a panel of advisers including education sector diversity, equity, and inclusion experts; researchers; organizational leaders; and master storytellers. Together, this group lent their knowledge and feedback, formulated key questions and hypotheses, supported interpretation of the data, and helped to identify the most salient and impactful findings emerging from the research. The advisory panel input shaped every aspect of the study, and we are immensely grateful for their generous time contributions, deep engagement, constructive feedback, and productive pushes.

Angela Cobb serves as an independent consultant with FirstGen Partners LLC and as a Bellwether Education Partners senior adviser. Angela led the advisory panel efforts for this project.

Advisory Panel Participants

Charter Management Organization Leader/Charter Operator

- **De-Lea Deane-Allen**, Achievement First
- **Frances Teso,** Voices College-Bound Language Academies
- **Greg White,** LEARN Charter School Network
- **Kara Bobroff**, Native American Community Academy/NACA Inspired Schools Network
- **Roblin J. Webb**, Freedom Preparatory Academy

Education Technology Leader

- **Jonah Kagan**, Clever

District Leader

- **Mónica Vasquez**, Alliance College-Ready Public Schools (formerly of San Francisco Unified School District)
- **Chris Barbic**, Laura and John Arnold Foundation (formerly of the Achievement School District)

Research Adviser

- **Maggie Potapchuk**, MP Associates
- **Dr. Jason Javier-Watson**, Penn Graduate School of Education

Nonprofit/Organization Leader

- **Amanda Fernandez**, Latinos for Education
- **Anne Eidelman**, Blue Engine
- **Carmita Semaan**, Surge Institute
- **Elisa Villanueva Beard**, Teach For America
- **Frances McLaughlin**, formerly of Education Pioneers
- **Ify Offor Walker,** Offor Walker Group
- **Jean Desravines**, New Leaders
- **Jonathan Klein**, GO Public Schools
- **Jonathan Schorr**, independent consultant
- **Justin Cohen**, writer
- **Layla Avila,** Education Leaders of Color
- **Marilyn Rhames**, writer
- **Melinda Spooner,** Achievement Network
- **Sid Smith**, Discourse Analytics
- **Thaly Germain**, Equity Partners
- **Veronica Palmer**, RISE Colorado

ENDNOTES

1. We chose to use Latinx, a newer term and an alternative to Latino/a. See page 12 of the main report for a full glossary.

2. Hewlett, Sylvia Ann, Melinda Marshall, Laura Sherbin, and Tara Gonsalves. 2013. "Innovation, Diversity, and Market Growth." Center for Talent Innovation. http://www.talentinnovation.org/_private/assets/IDMG-ExecSummFINAL-CTI.pdf; Phillips, Katherine W. 2014. "How Diversity Makes Us Smarter." *Scientific American*. October 1. https://www.scientificamerican.com/article/how-diversity-makes-us-smarter/; Hunt, Vivian, Dennis Layton, and Sara Prince. 2015. "Why Diversity Matters." McKinsey & Company. January. http://www.mckinsey.com/business-functions/organization/our-insights/why-diversity-matters.

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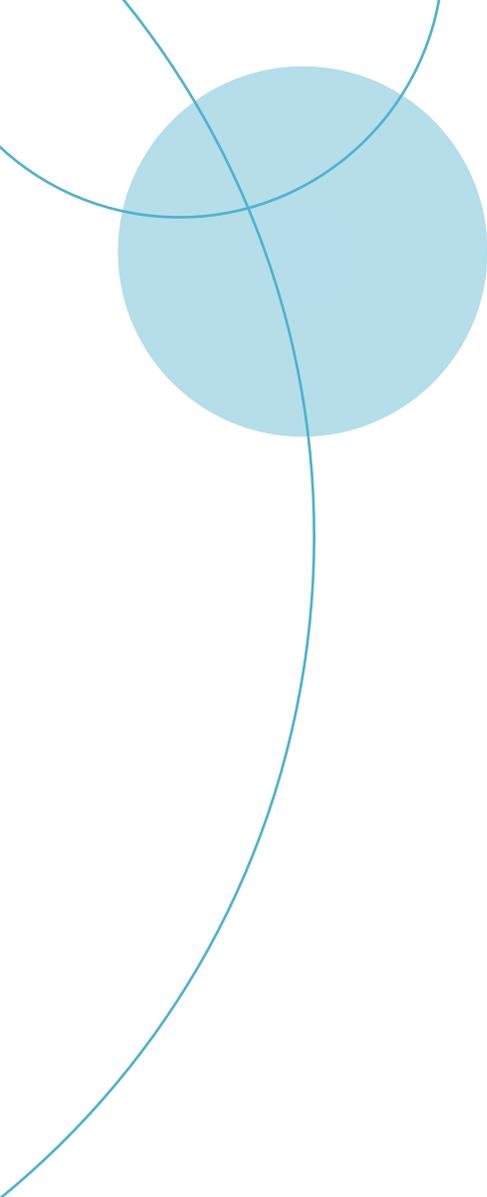
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