

**InDEEP**

**INITIATIVE**

Race to the Board

**RACE TO THE BOARD:  
Strategies for Readiness, Recruitment,  
and Retention of Black Trustees  
on Green Nonprofit Boards**

**FINAL REPORT • SEPTEMBER 2021**

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# Introduction

*“If we don’t have a diverse board that actually reflects the diversity of this country, we simply cannot achieve our mission as an organization. We have to have that diversity, both to bring different perspectives and to make sure that we are engaging this country at the broadest level in support of the objectives that we have...and to make sure that our work is in fact relevant to communities of color and across the nation.”* —BOARD LEADER

*“If you’re really doing the work, it’s going to be uncomfortable. You should feel uncomfortable. And the moment that a white male board member feels comfortable, they should be concerned. Because where we are in this country right now is an uncomfortable moment and will remain so for a very long time. So if you’re doing the good work, it’ll be uncomfortable. Get ready.”* —BLACK LEADER

The years 2020 and 2021 have been a time of unparalleled unrest across the globe. In the midst of the COVID-19 pandemic, anti-Black police brutality, unprecedented political dissent, and environmental calamity further exposed the racial disparity that exists in the United States. This cataclysmic time provides an opportunity for continuing to aggressively restructure antiquated social, political, philanthropic, and organizational systems to achieve racial equity and environmental justice. In light of the new presidential administration and the Environmental Protection Agency’s (EPA) most recent directive to concentrate efforts on reversing environmental racism,<sup>1</sup> green nongovernmental organizations (NGOs) working in the environmental and conservation sector – or “green groups” – are in a prime position to actualize progress in environmental justice.

For over a decade, much has been written about the critical importance of board and staff diversity in achieving impact – and in fact, the evidence shows that the increase of diversity within organizations has tangible benefits to corporations and nonprofits. (For a literature review and bibliography of works consulted for this report, see Appendices A and B.)

According to a 2016 study, nonprofit organizations with diverse board membership may operate with more effective governance practices and instill policies and procedures that promote cohesive group action.<sup>2</sup> Diverse groups tend to be more innovative when compared to homogeneous groups.<sup>3</sup> Diversity within boards has been correlated with an increased degree of effectiveness in executive leadership, an increased recruitment pattern regarding diversified membership, and an increased level of community trust,

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<sup>1</sup> Oliver Milman, “Exclusive: EPA Reverses Trump Stance in Push to Tackle Environmental Racism,” The Guardian, April 7, 2021, <https://www.theguardian.com/environment/2021/apr/07/exclusive-epa-environmental-racism-justice>.

<sup>2</sup> Kathleen Buse, Ruth Sessler Bernstein, and Diana Bilimoria, “The Influence of Board Diversity, Board Diversity Policies and Practices, and Board Inclusion Behaviors on Nonprofit Governance Practices,” *Journal of Business Ethics*, 133, no. 1 (2016): 179–191.

<sup>3</sup> Katherine W. Phillips, “How Diversity Makes Us Smarter,” *Scientific American*, October 1, 2014, <https://www.scientificamerican.com/author/katherine-w-phillips/>.

transparency, and support.<sup>4</sup> And board diversity leads not only to manifold thinking but also to improved board performance and relationships with investors.<sup>5</sup>

The impact of racial diversity on nonprofit boards is clear: diverse outlooks, experiences, skill sets, and voices have been shown to improve and strengthen board performance in a multitude of domains, including profit, productivity, relationships, and innovation.

Despite the urgent need for BIPOC communities to be fully represented in the nonprofit world, Candid, a sector watchdog, finds that “[f]unding in support of racial and ethnic minorities ranges between 9 to 12 percent of overall funding in the U.S.”<sup>6</sup> Additionally, Candid asserts that this proportion has varied only slightly over the past 15 years. In the environmental and conservation field specifically, a sizable gap exists in the funding white-led environmental groups receive versus what is awarded to BIPOC-led groups. Specifically, a recent report from the Inclusion, Diversity, and Equity in Environmental Philanthropy (InDEEP) initiative found that a \$2.7 billion dollar funding gap exists.<sup>7</sup>

Stanford Social Innovation Review, posits four areas in which racial inequities in philanthropic funding have placed organizations led by people of color at a major disadvantage:<sup>8</sup> getting connected, building rapport, securing support, and sustaining relationships. The report makes a cogent case that a lack of trust in organizations led by BIPOC is the underlying cause. This lack of trust can also be directly translated to the lack of placements of Black candidates on boards. To solve the issue of inequitable funding, it is necessary to go to the root of the problem – board composition. The question arises: How can nonprofit boards be assisted in recruiting and retaining Black trustees?

## THE INDEEP INITIATIVE

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The Institute for Strategic and Equitable Development (ISED), in collaboration with its implementation partner, Keecha Harris and Associates, Inc (KHA), facilitates a philanthropy-focused professional development series. The series began in 2017 with a core goal of supporting the environmental philanthropic sector as it transitions to more equitable policies and practices. The series’ initial offering was Inclusion, Diversity, and Equity in Environmental Philanthropy (InDEEP), now in its third phase. InDEEP engages foundation professionals through in-person and virtual events, webinars, strategic communications,

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<sup>4</sup> Patricia Bradshaw and Christopher Fredette, “Determinants of the Range of Ethnocultural Diversity on Nonprofit Boards: A Study of Large Canadian Nonprofit Organizations,” *Nonprofit and Voluntary Sector Quarterly*, 42, no.6 (2013): 1111–1133.

<sup>5</sup> PricewaterhouseCoopers, *The Collegiality Conundrum: Finding Balance in the Boardroom: PwC’s 2019 Annual Corporate Directors Survey*, 2019, <http://www.circulodedirectores.org/wp-content/uploads/2019/12/pwc-2019-annual-corporate-directors-survey-full-report-v2.pdf>.

<sup>6</sup> Anna Koob, “What Does Candid’s Grants Data Say About Funding for Racial Equity in the United States?” Candid, July 24, 2020, <https://blog.candid.org/post/what-does-candid-grants-data-say-about-funding-for-racial-equity-in-the-united-states/>.

<sup>7</sup> InDEEP Initiative, *Closing the Gap: Insights from the Field to Close the \$2.7 Billion Funding Gap Between White-Led and BIPOC-Led Environmental and Conservation Organizations*, September 2021, <https://www.indeepinitiative.org/reports>.

<sup>8</sup> Cheryl Dorsey et al., “Overcoming the Racial Bias in Philanthropic Funding,” *Stanford Social Innovation Review*, May 4, 2020, [https://ssir.org/articles/entry/overcoming\\_the\\_racial\\_bias\\_in\\_philanthropic\\_funding](https://ssir.org/articles/entry/overcoming_the_racial_bias_in_philanthropic_funding).

and communities of practice. In four years, the InDEEP initiative has reached over 1,200 leaders and staff at 180 foundations, representing total assets of approximately \$172 billion. To date, the initiative has brought together the funding of 13 foundations to invest in the work. To further expand its reach, InDEEP has worked with six funder affinity groups. In general, project activities are designed to:

- create an inspiring and compelling space for peer-to-peer dialogue about and exploration of how to deepen one’s organizational commitment to more racially equitable funding;
- communicate operational and programmatic practices used by foundations of differing scales to reflect the range of options and possibilities to suit distinctive organizational needs and cultures; and
- generate interest and participation through a range of activities, including in-person and virtual meetings, webinars, and multichannel strategic communications, that highlight successes and demonstrate options for gainfully addressing challenges.

Historically, InDEEP was created as a professional development series that engages a network of foundation staff, including senior leaders, committed to integrating racial equity and social justice throughout environmental and conservation philanthropy. InDEEP supports environmental grantmakers to cultivate opportunities to increase funding for organizations led by Black, Indigenous, and people of color (BIPOC<sup>9</sup>), embed a justice and equity lens into their grantmaking, and strengthen the capacities of grantee organizations and leaders across the field to create a more diverse and inclusive environmental movement. It does this by providing racial equity and social justice training on how to get started, how to shift grantmaking portfolios, and how to build pathways for more equitable funding. InDEEP also provides leadership development and the cultivation of a network of grantmakers for support and peer-to-peer learning. The first phase of InDEEP convened conservation and environmental funders in a series of in-person meetings designed to explore the challenges, opportunities, and best practices for equitable grantmaking. The second phase, the Embedding Equity Community of Practice (EECoP), led a cohort of funders and investors through a learning journey that focused on building capacities to advance racial equity in their foundations’ internal policies, practices, and workplace cultures. EECoP participants were at varying levels of readiness, engagement, and knowledge relative to their commitment to and integration of racial equity and social justice within their organizations.

Now in its third phase, known as “Closing the Gap,” InDEEP aims to 1) create a more diverse, equitable, inclusive climate in philanthropy culture around capacity building

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<sup>9</sup> BIPOC (Black, Indigenous, and people of color) is not a term that resonates with everyone – this is an evolving lexicon. InDEEP started this work using the term “people of color.” Some Indigenous people felt that this term did not reflect their experience. In this dynamic environment, InDEEP wants to convey that its initiatives speak to all people who are marginalized due to their degrees of non-proximity to whiteness. InDEEP’s intention is that the term “BIPOC” includes Asian and Latino/a/x people as well as other racially and ethnically under- and misrepresented groups.

and 2) increase equitable resourcing of BIPOC leadership and organizations through transforming, engaging, realigning, and financially committing to structures and institutions that follow the lead of BIPOC, who are among those most impacted by environmental and conservation issues, including the effects of climate change.

## **RACE TO THE BOARD**

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NGO board leadership is an important tier in the environmental structure. Board leadership is the place where equitable and inclusive practices can positively impact environmental justice. Building on the momentum and sociopolitical opportunities to reverse environmental racism and advance climate justice, another body of work emerged from InDEEP in 2020. Race to the Board (R2B) is a two-pronged approach intended to disrupt current practices that are not bringing sufficient levels of Black leadership to the boards of environmental and conservation organizations. R2B was developed to further InDEEP's mission of transforming the environmental and conservation sector. R2B aims to identify ways to cultivate more equitable and inclusive green NGO board practices while amplifying BIPOC voices and participation in leadership roles within the environmental and conservation field.

The goals of R2B are to:

- 1.** identify successful diversity, equity, and inclusion (DEI) strategies implemented by environmental and conservation boards to inform research and actionable steps that can be replicated by other entities;
- 2.** illustrate current board challenges to building and maintaining inclusive culture; and
- 3.** develop a set of recommendations for the field based on readiness, recruitment, and retention (3Rs) (Figure 1) to increase Black leadership and representation on environmental nonprofit boards, developing a two-way conduit between green NGOs and those communities most affected by environmental racism.

FIGURE 1. READINESS, RECRUITMENT, AND RETENTION IN PRACTICE (3RS)



The 3Rs guided the development of the strategic framework for evaluating green board readiness, recruitment strategies, and retention efforts to engage and sustain Black talent. Simultaneously, cultivation of more equitable and inclusive environmental and conservation leadership with informed and intentional practices may empower those committed to progressing the environmental and conservation movement with the result of greater impact. The intention of this body of research is to be additive and supportive of work that is concurrently being done by others in the field to create more equitable and inclusive organizations while including the voices of those most often impacted by environmental racism. The theory of change for this approach is illustrated below (Figure 2).



FIGURE 2. RACE TO THE BOARD THEORY OF CHANGE



\*THIS PHOTO BY UNKNOWN AUTHOR IS LICENSED UNDER CC BY

# Key Findings

InDEEP conducted 35 interviews with board leaders representing 16 prominent green organizations and 39 Black leaders in the field; a total of 74 participants were interviewed. It is important to note that the vast majority of Black leaders who were interviewed (36 out of 39) serve in some role on a board; thus, they brought a dual perspective to the conversations. (For more detail, see “The Research,” below.)

Results are presented by the learning questions and organized in the following sections: readiness; recruitment; retention; and metrics and environmental impact through DEI. Quotes supporting frequent themes are provided to address each learning question. All quotes exclude identifying information.

## READINESS

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### Learning Question 1: Markers of Commitment

*What are markers of a board’s commitment to genuine strategies designed to cultivate cohesive group DEI planning, development, and implementation?*

Board leaders were asked to rate the importance of board diversity and to explain their rating. They reported diversity to be very important in environmental and conservation organizations (rated 4.89 on a scale of 5.00) and even more so in their own organization (rated 4.95 out of 5.00). However, those in top leadership positions (i.e., executive directors, CEOs, presidents, and board chairs) who responded with their own demographic data were predominately white (86%), with a smaller percentage of Hispanic, Latinx, or Chicanx leaders (14%). No other race/ethnicity was communicated. According to board leaders, 31% of the 16 green organizations interviewed currently have no Black board members. Although the majority of interviewees rated diversity as very important, data show that leadership of these same organizations is predominately white.

When asked to elaborate on why groups felt diversity was important for their organization, board leaders reported that including diverse talent was the morally right thing to do, necessary for their organizations to remain relevant, and the only way to truly make an impact on environmental and conservation issues and to fulfill their mission. Board leaders’ commitment to genuine DEI work focused on addressing environmental and social justice is evident in the following quotes:

**Long-term commitment to DEI:** *“And we’re committed to it for the duration of the organization. You know we don’t see this as like a one-off thing. This is kind of where we’re building this into the culture of the organization.”* —BOARD LEADER

**Commitment to combat racism:** *“Our board recently adopted a resolution to our commitment to combat racism and advance the Black Lives Matter movement from where we sit, to the extent we can.”* —BOARD LEADER

The interviews with board leaders revealed that there is a sense of urgency to focus on DEI work; in fact, all of the organizations stated an understanding that working toward becoming more equitable and inclusive was critical. According to the interviewees, the awareness is there, at least in theory, but in some cases concrete practices are absent and diverse representation is still lacking.

Boards are at various levels of preparedness to commit to reforming practices, policies, and structures. Some boards have been operating with a racial equity lens for years, while others are only beginning their racial equity journey. Some board leaders mentioned that they were not able to fully represent the board or the board’s understanding of or commitment to DEI work. The following statements portray a sense of incohesiveness in a board’s ability or willingness to fully commit to understanding the need to operate through a racial equity lens:

**Incohesive willingness:** *“Yeah. I think that’s going to be a learning edge for a lot of folks, right, because a lot of us are still just barely comfortable saying white and Black and identifying race as a critical piece of this work.”* —BOARD LEADER

**Incohesive understanding:** *“I would say it’s a very varying depth of understanding. Some people, I think, are very in tune to it. Other people are frankly probably in denial. So probably a lot like America, I think there’s a big difference of understanding across different board members.”* —BOARD LEADER

Board leaders often referenced statements their organizations have made publicizing their commitment to DEI or directed the researcher to their posted DEI plan. Additionally, to be more intentional in equity work, some groups have established a DEI committee or task force or have hired individuals whose sole focus is to oversee and assist in guiding progress toward DEI goals, such as an equity officer or a DEI consultant. A review of the 16 participating green organizations’ websites revealed that 81% of the groups had made a statement of their commitment to working on DEI within their organizational scope. This included committing to centering racial and environmental justice within the organization’s operations. Half of the organizations had incorporated language demonstrating a commitment to operating with fairness, justice, diversity, equity, and inclusion in their strategic plan although fewer than half had implemented a DEI plan detailing actionable steps. In addition to being explicit in strategic equitable and inclusive planning, transparency of board composition through demographic data collection and reporting was stated as an important marker of commitment to becoming a more diverse institution.

In explaining the importance and process of committing to working through the implementation of equitable and inclusive practices, one-quarter of the green organizations reportedly experienced resignations of board members who were not fully committed to institutional changes; board leaders from these organizations stated that the loss of these individuals was beneficial to the overall growth, progress, and impact of the organization. Board leaders reported that commitment to becoming a more equitable and inclusive organization was necessary for advancing toward actualizing justice.

Board leaders pointed to varying levels of organizational readiness in achieving genuine equity and inclusion. Quotes included:

**Unwilling and unable:** *"We have some old-school folks who don't really get it. They understand that we as an organization need to look different, and I've explained it to them, and they've all bought in, but I don't know how much of that is like, 'Okay, yes, the right thing to do, people expect us to do it' versus 'This is really important to me personally.' So it's hard to say just the breakdown. Nobody's dumb enough to say 'I don't get why we have to help these communities and these people.' So we have smart-enough board members not to say those sort of things, even if they might think them in the back of their mind."* —BOARD LEADER

**Willing and unable:** *"I think institutionally we have not prioritized it prior to, honestly, I mean, if we're super honest, the past two years. I think we got really strategic and recalibrated around how we were recruiting and accessing external networks that were different and distinct from the ones we currently could resource and draw from. And then I think we have the same challenge that a lot of the nonprofit, large nonprofit environmental organizations and smaller ones [have] is that we haven't, I don't think we have...built our organization in a way that it naturally recruits and leans to communities of color and it seems like it's relevant in their work, in their lives."* —BOARD LEADER

**Willing and able:** *"I think readiness is just being so explicit about the intention, having a critical mass of board members who are truly committed to it and get it and do the work and are passionate about it and a willingness to be clear that this is the direction the board is going in and it's a requirement."* —BOARD LEADER

## Learning Question 2: Scaffolding Needed

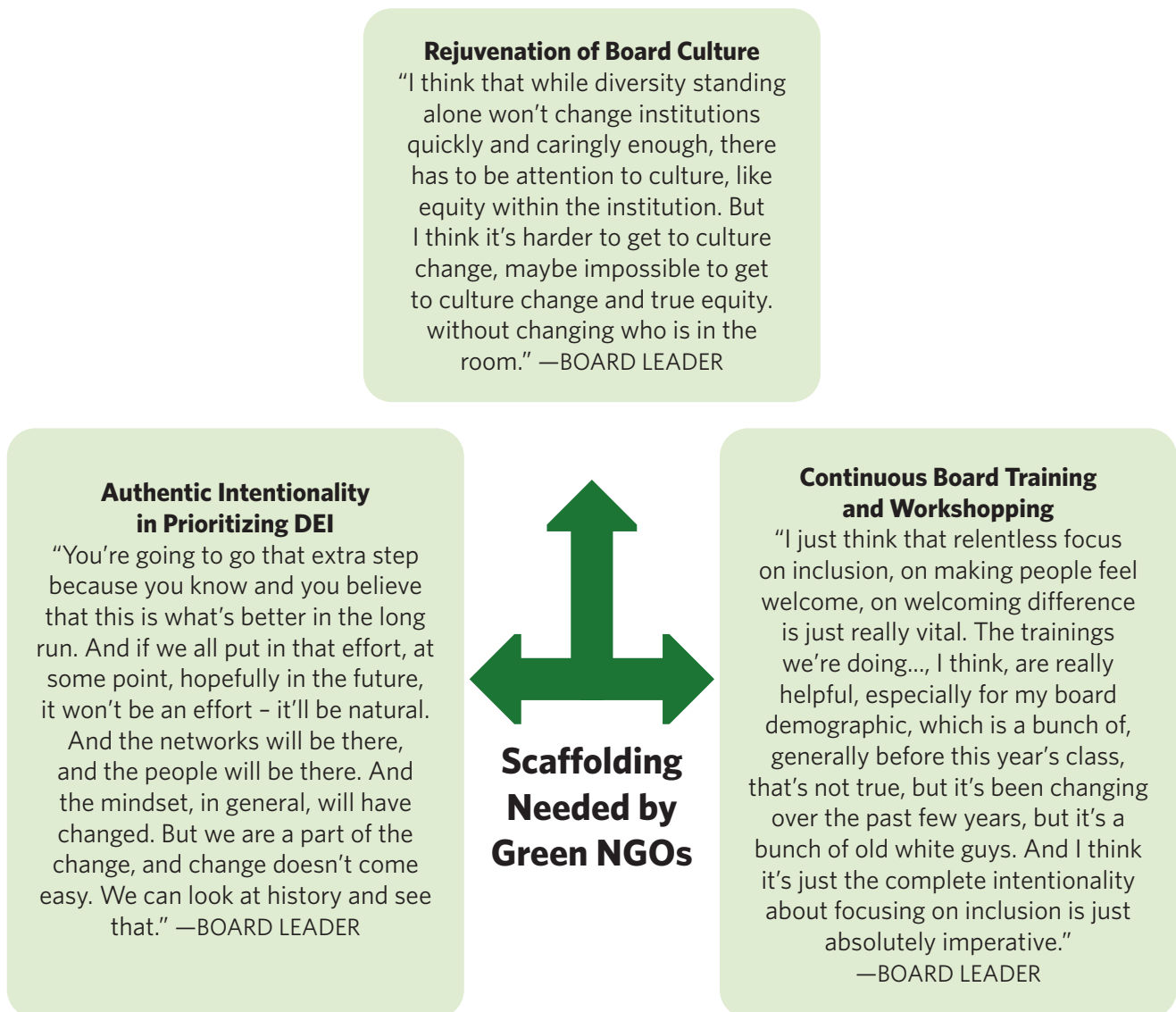
**What supports do Big Green<sup>10</sup> groups need to further diversify their boards and increase the number of Black board members?**

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<sup>10</sup> According to the Center for Media and Democracy's SourceWatch, Big Green is a term used "...to describe the biggest environmental organizations in the United States. These are heavily-staffed, well-funded non-profit corporations each with budgets in the tens of millions of dollars a year, offices in Washington, DC and other major cities, highly paid executive directors, and a staff of lobbyists, analysts and marketers. Big Green environmental groups together raise and spend hundreds of millions of dollars a year, most of it contributed by non-profit foundations and individual donors." See The Center for Media and Democracy, "Big Green," SourceWatch, last updated February 25, 2020, [https://www.sourcewatch.org/index.php?title=Big\\_Green](https://www.sourcewatch.org/index.php?title=Big_Green).

This question was developed to understand areas for opportunity and growth in a board's readiness to increase genuine DEI competency. In response, a progression in equitable and inclusive board culture was the most common theme from board leaders. Additionally, continual board training and intentionality in prioritizing a DEI approach and strategy was commonly stated. Figure 3 includes examples of statements from board leaders describing the required scaffolding in boardroom practices.

**FIGURE 3. SCAFFOLDING NEEDED BY GREEN ORGANIZATIONS (CULTURE, TRAINING, AND INTENTIONALITY) ACCORDING TO BOARD LEADERS**



Board leaders were asked to explain their board’s current readiness in relation to their understanding of how structural racism shows up in environmental justice. Responses varied from those indicating no clear insight to those reporting a more technical understanding, with few demonstrating a tangible recognition of the connection between structural racism and the work the organization is doing. The majority of groups have not prioritized organizational discussions on deep institutional disparities. The following five statements display varied comfort levels with and unity in the awareness of the intersections between structural racism and environmental justice, beginning with minimal awareness:



*“Okay. So first, I don’t know what you mean by structural racism...and how much opportunity there is to improve that. That’s something I wouldn’t really have a good feel for.”* —BOARD LEADER

*“I don’t know. We haven’t had that discussion, so I probably shouldn’t comment on that one.”* —BOARD LEADER

*“Yeah, and when I say white supremacy culture, talk about structural racism, there’s a couple board members from the Deep South that kind of bristle, but for the most part, there’s no pushback anymore.”* —BOARD LEADER

*“And I think it’s just been such a focus of programmatic prioritization and investment that they kind of get it, and they get it in programmatic conversation, they get it in budget conversation, they get it within the board.”* —BOARD LEADER

*“We are convinced that we cannot reach our mission unless we include more people to be more just and fair and be able to deal with issues of systemic racism. It’s only if we dismantle racism and supremacy structures that we can then fulfill our mission of protecting the planet.”* —BOARD LEADER

## RECRUITMENT

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### Learning Question 3: Effective Practices and Challenges in Recruitment

*What are effective practices and what are the challenges for recruiting Black board members for the Big Green nonprofits?*

To explain recruitment strategies and current challenges, board leaders and Black leaders were asked to respond to the following series of questions, respectively.

Board leadership:

- What do you think would help further increase your board diversity, specifically Black board members?
- What would be helpful with recruitment efforts?

- How can the pipeline be built?
- Why do you think that there are not more Black board members on your board?

Black leadership:

- What would you as a Black leader want from a board to feel valued and included? Please discuss any specific recruitment strategies.
- Are there challenges involved in having a more racially and ethnically diverse board? Please explain.

### Effective Recruitment Practices

#### **Effective recruitment practices according to board leaders**

When asked to elaborate on specific recruitment techniques that have been effective in furthering their board's growth and transformation, board leaders discussed the following actions:

- hiring a DEI recruiter or executive search firm;
- creating junior boards, paid fellowships and internships, and partnerships with professional organizations; and
- rethinking term limits, governance structure, and requirements to join a board (e.g., give or get, donation amount, educational attainment).

The most frequent responses were related to building a pipeline to Black communities and broadening the organization's network of recruitment. Regarding building a pipeline to Black communities, board leaders mentioned needing to connect with HBCUs, create opportunities within leadership and staff, and focus on larger systemic problems in education. In reference to broadening the network, board leaders pointed to building strong relationships, increasing critical mass and representation, and matchmaking. Board leaders offered the following comments:

**Building the pipeline:** *“So I guess what that means is that if you really want to build the pipeline, you have to create opportunities. I think you have to create opportunities not only on the boards, but you have to create opportunities within the leadership of environmental organizations, and you have to have a more diverse set of environmental organizations. That then comes back to foundations putting more money into, well, either environmental justice work or organizations that have a very diverse workforce.”* —BOARD LEADER

**Broadening the network:** *“Well, yeah. I mean, frankly, the more African Americans that we bring onto the board, the more of their network of folks who are also people of color they'll make available to us. So it almost becomes like a self-fulfilling prophecy. The more diverse our board gets, the more diverse it will become in the future because we're*

*going to have more people with deeper, richer networks that we can tap into. And again, our goal is to look more like America.”* —BOARD LEADER

## **Effective recruitment practices according to Black leaders**

When asked what would be effective in board recruitment techniques, Black leaders discussed wanting to know that they are transparently being recruited for the value and skill they are bringing to a board and wanting to ensure that they are not being recruited due to board tokenization. Black leaders confirmed that critical mass matters – there is a greater likelihood of recruiting Black leaders if a board is already diverse. Additionally, Black leaders indicated that a board’s reputation influences the likelihood of membership. Specifically, how a board is perceived will determine if candidates want to join or recruit from their networks when the board is seeking new members. According to Black leaders, a board’s trustworthiness, its previous practice of power sharing, and its examination of power structures and power sharing in the organization are all important factors. The following statements present strategies that Black leaders said would “build the pipeline” of Black board candidates:

**Scholarships, grants, and other funding sources for Black students:** *“I think [boards] should do some kind of analysis of the current power structure that they’ve been working in historically and how that could inherently leave out people that are most impacted. I think investing in scholarships and grants and funding sources for Black students would be amazing.”* —BLACK LEADER

**Support through junior boards:** *“...create something like a junior board where you find local leaders or leaders that are not quite board-ready yet but you put them on a track to developing into someone that would be board-ready or what not if they’re still interested and so creating something like a junior board that could attend board meetings from time to time and learn the in[s] and outs of an organization in an attempt to build their résumé if you will. To get board-ready, I guess.”* —BLACK LEADER

The most frequent response in Black leader interviews pertained to a board having already begun implementing racially just, equitable, and inclusive practices within their organization. Such practices include being accountable in embedding racial equity and justice in practices, being transparent in board culture, and walking the talk and beginning the work. One Black leader said:

**Embedding racial equity and justice in board practices:** *“But for recruitment, I would need to understand what their goals are with having me there, like are they really trying to have change or is this just a token effort? What are they doing to make sure that I’m not the only person of color or Black person on this board, and how are they holding themselves accountable to embedding racial equity and justice within the board and for the organization to follow? So I just would need to see something that’s real, that’s*



*tangible, some real goals, some real planning, something reflective in the mission, or the intention to engage in a strategic planning process, and you want to bring new people on because you want to start off fresh. I need to see something real. That's for recruitment."*

—BLACK LEADER

### Challenges to Equitable and Inclusive Recruitment Practices

When asked why there were not more Black board members in their organization, board leaders reported the following perceived challenges:

**Ignorance:** *"I think it's a little bit of maybe ignorance in some ways, just sort of not thinking that there's people out there who would be interested in participating."* —BOARD LEADER

**Pipeline issues, board structures, and homogeneously white networks:** *"It's a pipeline issue. It's structuring board responsibilities and compensation in a way that permits a broader segment of the environmental movement to participate. And then third of all, a bit of a self-perpetuating problem of board members in terms of who they can think of, they think about people who they know well, and historically, that has not been a diverse group."* —BOARD LEADER

**Historically prioritized whiteness:** *"Environmental work...has been historically focused on the needs of rich white males within this country. And that means that it has been exclusionary, and it has been in some cases, even not just benefited but created issues with diverse communities."* —BOARD LEADER

Black leaders also discussed challenges in recruitment practices:

**Systemic issues:** *"I mean, if it's a challenge for any organization to include a Black board member, like a single Black board member, if that's the challenge, there are a lot of things wrong with your organization. It doesn't matter what your fundraising was last year. It doesn't matter how many programs. If that's a challenge, there's something very wrong with the organization."* —BLACK LEADER

**Monocultural boards:** *"The challenges come when boards have been monocultural. If it's just been a white board and even if it's just been one gender, then people tend to be a little bit more resistant to change, and so I think that there is the difficulty in there. And then also being open to someone who has different views. When you bring in someone who is of a different race and they have different experiences, they tend to challenge the prevailing thought and culture because they interject and they bring in experiences that are foreign to the current culture. So if they're not open to being uncomfortable and having someone come in that will bring a different perspective, if that's not what they really want, then that will be very challenging, and then it's just tokenism."* —BLACK LEADER

**Cultural readiness:** *“Yeah, I would lift up the readiness and retention. Recruitment should be last. Get yourself ready. What are you doing to continue to learn, to continue to grow, to continue to systematically look at these things that have kept people out? And once you’ve got that down, then you need to start recruiting.”* —BLACK LEADER

## RETENTION

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### Learning Question 4: Effective Practices and Challenges in Retention

*What are effective practices and what are the challenges for retaining Black board members at the Big Green nonprofits?*

Both board leaders and Black leaders discussed board member retention. Board leaders were asked to describe internal inclusive policies and practices that are implemented by or within board culture and to explain what would be helpful for retaining Black talent while also discussing any challenges. Black leaders were asked what green groups can or should do to ensure more inclusive and more racially and ethnically diverse boards and were asked to expand on what would increase feelings of being valued and included.

#### Effective Retention Practices

The following points summarize strategies that emerged from interviews with both board leaders and Black leaders. It was stated that green group boards should:

- increase transparency in hiring processes and leadership promotion opportunities;
- implement policies and/or practices aimed at improving board culture;
- provide onboarding practices and mentorship programs geared toward retention;
- increase equity and inclusion in practices and policies;
- engage Black leaders in relationship and trust building inside and outside the boardroom setting; and
- provide clear expectations of board requirements prior to recruitment.

Board leaders also pointed to the need for effective board management, inclusive policies and practices, transparency in governance, engagement and valuing of skill sets, and increased diversity to create critical mass. One board leader said:

**The impact of increased diversity and critical mass:** *“...the more people of color at the table, the more I think people are going to be really invested in staying. So we don’t have any metrics in our DEI plan that are specifically around like, let’s get to this percentage. I would love to see our board fully reflect in terms of demographic data. It’d be the diversity of the United States, so that’s really, I mean it’s 40 to 50 percent of Black, Indigenous, people of color. And so anyway, I think that when our percentages increase also that, that’s just going to bring with it more retention.”* —BOARD LEADER

Black leaders said that retention is enhanced when there is establishment and rethinking of mentorship, increased engagement, comprehensive onboarding, listening to and valuing of diverse perspectives, and priority on inclusive and internal work (individual and organizational). One Black leader said:

**Comprehensive onboarding:** *“But having a thorough orientation period, making it okay to ask questions, making sure that folks understand the strategic vision, articulating things about board culture that might be implicit, making sure that folks have pathways to understand process, all of those things, really thinking about what your board culture is, what you want it to be, and how you’re communicating it and cultivating it is important.”* —BLACK LEADER

### Challenges to Equitable and Inclusive Retention Practices

While about one third of board leaders reported that they did not perceive great challenges with retaining Black board members once they had been recruited, others did note challenges in retention. The following statements were made by board leaders:

**Microaggressions and harms:** *“Trying to be willing to address those microaggressions or any kind of harms in the moment. I mean, there’s a whole cultural component of making it a psychologically safe space to operate in. And I just think a lot of that, if folks aren’t doing the pre-work, we’re basically just setting up folks to be trailblazers but also be massively harmed in the process.”* —BOARD LEADER

**Overt racism:** *“If you have a board member who is racist or who singles out other people because they’re of a different race than everyone else, that’s going to be a problem. So you need to address that.”* —BOARD LEADER

Black leaders discussed multiple occurrences that can lead to resigning from a board:

**Disregarding racism:** *“Some people can just say, ‘Racism isn’t a big deal.’ Then, it would just be like, ‘Well, I think racism is a big deal. I guess we agree to disagree.’ I don’t know necessarily what to do with that yet. It would be rude to kick somebody off the board because they don’t believe racism exists. But I don’t care. I can resign. It’s like I don’t have to be there if this person is there.”* —BLACK LEADER

**Missing the internal piece:** *“And I think that’s what a lot of boards, green boards, forget. Everybody wants to recruit, recruit, recruit, and no one wants to do the internal work, whether that’s internal personal work as board members or internal work as an organization considering policies and giving and all of these things that are either seen or unseen barriers for different people to participate. So, yes, it’s important. And it’s important for folks to think about the space to keep people.”* —BLACK LEADER

**Tokening Black board members:** *“That’s one of the most surefire ways to alienate someone that you’re claiming that you want to incorporate into your organization is if you’re just trying to check a diversity box without actually doing the work because it shows. It’s maybe not readily apparent at the beginning, but it becomes very, very visible to anyone that is not part of the dominant culture that the work isn’t being done and you’re not willing to do the work.”* —BLACK LEADER

## METRICS AND ENVIRONMENTAL IMPACT THROUGH DEI

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### Learning Question 5: Increasing Field Engagement and Amplifying Message

*What do Big Green boards need to help increase field engagement and amplify their message?*

Board leaders were asked to explain the impact of having greater Black representation on their boards and to discuss strategies that have been pivotal in operationalizing and supporting environmental justice. Black leaders were asked to discuss outcomes and advancements made possible by Black leader engagement.

Most board leaders reported that increased engagement and reach will only occur by ensuring that there is representation from all populations and by seeing the importance of broadening their mission to focus on environmental and social justice. Although some board leaders stated that they cannot reach their mission if they do not include a racial equity lens, more evidence-based education and training was reported as necessary to ensure that all board members grasp this reality. To increase engagement within the field while amplifying their message, board leaders mentioned the following needs: building and reconceiving partnerships and relationships within the field; building awareness within communities; and focusing mission on communities served.

When asked about strategies that have been pivotal in operationalizing and supporting environmental justice, board leaders observed that green organizations are often focused on aspects of the outdoor environment without recognizing the intersectionality of social justice, environmental justice, and the actual people living in the environments they seek to protect. The following quote from a board leader explains the importance of this intersectionality:

**Intersectionality:** *“I also think that for too long that the national environmental groups like mine have thought about social justice and racism as huge problems but ones that exist alongside the environmental problems that our groups and our missions seek to address. And it’s just not correct. And as the country reckons with racial injustice and its pervasiveness and its overwhelming influence on our society and the barrier that it is to progress, we have to dismantle systemic racism within our own organizations to be able*

*to carry forward our mission, which must center justice, including racial justice.” —BOARD LEADER*

The following statement from a Black leader further indicates the intersectionality between addressing organizational impact through equitable inclusion of diverse membership:

**Intersectionality:** *“Yeah, it’s very important because you have to have diversity and you need to have Black leaders if your intention is to look at equity and if your policies and your service is supposed to include communities as a whole. So in the conservation and environmental field, we have this saying, ‘Where the wind blows, the water flows.’ So if it’s in my community, it’s going to be traveling to yours at some point. So there’s no disconnecting when it comes to the environment. And so it’s really important that whatever we do be reflective and be accessible to all communities. And so if you don’t have that representation, then you don’t really know what’s going on in other communities, and there’s no way for you to really understand the difficulties or the barriers that communities face in accessing resources and getting to solutions because sometimes they just aren’t heard and the local government isn’t responsive.” —BLACK LEADER*

Black leaders reported that communities of color are most impacted by environmental issues and should be included in working toward solutions. Additionally, Black leaders noted that an organization can have greater engagement with diverse communities by including board members who are from those communities.

A broader mission that focuses on partnerships and includes representatives from communities in board membership can increase effectiveness in engagement. To increase field engagement and subsequently amplify mission impact while holding environmental justice at the center of the work, board leaders said that boards need to increase board capacity through education, increase transparency within the field, show up authentically, prioritize work around people, broaden the mission, and identify and resolve core injustices. Board leaders said:

**Be authentic:** *“And I think authentically being there not just when the cameras are there but when the cameras are off, making sure there’s authentic long-term commitment to the solutions, that you’re actually driving local solutions. And there’s a humility of actually listening and lifting up the best ideas locally instead of imposing from...wherever folks are located from.” —BOARD LEADER*

**Prioritize people:** *“Let’s make sure that we’re actually externally in terms of the conservation goals we seek that we’re working with the diversity of communities that exist. And we’re prioritizing our work around people, not just the biology of ecosystems and where are the big places to protect, so that we can have a more representative effort that’s supporting these communities.” —BOARD LEADER*

**Resolve core injustices:** *“We don’t think we can get to where we need to get in terms of climate solutions or the biodiversity crisis or just basic human health in this very wealthy country where people are so sick, we just don’t think we can get there without resolving core injustices.”* —BOARD LEADER

### Learning Question 6: Indicators of Inclusive Culture

**What indicators are environmental and conservation organizations using to measure progress around building inclusive culture?**

To address this question, board leaders were asked to describe current inclusive policies and practices and methods for measuring progress. While the majority of board leaders stated that they are collecting demographic data to measure inclusivity of diversity, there were others that didn’t see the value in collecting that information. As such, they may not collect at all or do so in a way that is not methodologically sound and wildly inaccurate. Board leaders provided the following responses regarding metrics used to track inclusivity of diversity:

**Demographics not collected:** *“I’m never going to ask somebody if they’re gay; it’s just none of my...business. But I can tell if they’re Black or if they identify as Hispanic or something like that, so that’s fine. Again I’m not going to go overboard and try to do a full demographic profile of our board.”* —BOARD LEADER

**Broader DEI metrics:** *“So everybody has the opportunity to self-identify and then that fills in our board matrix, which enables us to see current board demographics. And then we use a part of that board matrix also to track our board prospects and some of their diversity. So there’s the combination of that and our board DEI plan, which has a lot of goals around not only board membership but board leadership and inclusive culture and equity. So the board DEI plan also helps us stay on track toward our goals.”* —BOARD LEADER

Black leaders were asked to describe metrics that may be used to measure a board’s progress toward becoming a more inclusive and diverse institution. The following quotes illustrate their responses:

**Equitable metrics and bylaws:** *“They need to have equitable metrics. It needs to be in their bylaws; it needs to be in their strategic plan. They just have to be very intentional, and you have to do things that hold them accountable to it. It has to be more than just, ‘Because we feel good, we’re going to do it this time.’ It has to be something that says, ‘You’re not actually in alignment with our values or with our actual formal structure, our legal structure.’ Put it in the bylaws, say that one of the categories is representation, one-third of the board needs to be BIPOC. Put it in the bylaws.”* —BLACK LEADER

**Qualitative and quantitative data:** *“I think you need both qualitative and quantitative data. And because, as I mentioned, if you’re just looking quantitatively, you might be thinking you’re seeing diversity when what you’re really saying is tokenism.”* —BLACK LEADER

The majority of the green NGOs surveyed collect demographic data on their boards, but there is not a uniform method of collection, and the utility of collecting these data is not clear. Both board leaders and Black leaders expressed the belief that demographic data collection is only one way to track diversity. Additionally, equity and inclusion are separate variables that require different methods of evaluation. Fewer than half of the green NGOs were aware of current metrics being used to effectively evaluate equitable and inclusive strategies or policies in their organizations. However, about one third of green NGOs are beginning to implement evaluation tools to assess board culture and perceptions of progress. Board leaders pointed to several indicators of inclusive culture, including satisfaction of inclusivity in meetings, representative diversity from BIPOC communities in board composition, practices and policies that address racism in place, and competency in racial equity and inclusion. Board leaders described such practices:

**Satisfaction of inclusivity in meetings:** *“One is board metrics around demographics of the board. The other is an annual board survey that we do around how each member is feeling included and if the meetings are engaging them and their skills. We ask questions like that. Are there things we could be doing differently? It’s not quantitative, but it’s way more super informative, how we’re working. I would say it’s sort of a board survey evaluating ourselves on how we’re functioning as a board and how we’re progressing as an organization, I guess, and what we should focus on more. So I think those are the sort of the key tools that we use.”* —BOARD LEADER

**Competency in racial equity and inclusion:** *“We have a code of conduct that if somebody violates any kind of equity norm, there are consequences, up to expulsion. But also now we’re bringing in [a] service that’s kind of remediation to try to address things in real time, to determine where it should go but also for folks that, for basically having a system that has much more racial equity competencies. So as things come up, there’s an immediate redress to repair the harms. And so, and again, we’re not perfect. There’s harms being perpetuated all the time in the organization still. But setting up systems to deal with that in real time and having folks have the competencies to, first of all, understand their own behavior but then also respond if there’s harms perpetuated by others is at least beginning to create that kind of safe space.”* —BOARD LEADER

### **Learning Question 7: Social Justice-Oriented Indicators**

***What are the social justice-oriented indicators rooted in racial equity and justice that Big Green groups should use to measure one to five years of progress?***

Board leaders were asked to describe data that are currently being used to measure progress, while Black leaders were asked what type of data would be useful in measuring the board’s progress toward becoming a more inclusive and diverse entity.

When discussing social justice-oriented indicators and metrics that may be beneficial in effectively measuring annual progress, board leaders referenced their organization's DEI plan. By implementing a plan with a racial equity lens that identifies the direction in which the group plans to go and that also includes indicators tracking the number of goals met and/or unmet, groups are updating their action plans annually. According to board leaders, to best capture progress, both qualitative and quantitative metrics should be used (e.g., focus groups, session evaluations, surveys, etc.). Indicators displaying movement toward social justice according to board leaders included: increase in BIPOC satisfaction with organizational practices and policies; broadened mission to include social justice and environmental justice priorities; accountability in DEI assessment of board practices; decrease in social and environmental justice impacts to BIPOC communities; and representation and support reflective of communities served. One board leader said:

**Greater representation from the communities served:** *“Well, no matter what, then in some cases the board should even have greater representation than the population to right wrongs, in terms of inequities, there might be a need for even more of a perspective, so that there is a greater understanding of the underpinnings of inequities as well as the solutions. And so the governance is actually democratic governance that probably represents the interests of the populace.”* —BOARD LEADER

The following statements from Black leaders illuminate the importance of benchmarking an organization's impact in Black communities while highlighting the need for disaggregated data:

**Decreased disparity in communities most impacted:** *“Yeah. Even looking at these things after five years, how has the board changed? What's the demographics of the board? What's the demographics of the leadership within the organization? Look at even within their goals, is there impact? What is the impact? I guess after five years you'd want to be looking at impact, not outcome. Has there been a measurable impact in seeing a reduction or a decrease in disparity? Whatever their agenda is related to climate or environment, are we seeing any changes in the most-impacted communities?”* —BLACK LEADER

**Decreased disparity in communities most impacted shown by disaggregated data:** *“You can't lump everybody together because you can say, 'We've made these changes to people in the state.' But then if you just aggregate it by race, you see that but these certain communities, the change was not as impactful or as great or the disparities between majority and minority communities is quite large. So we have goals, but are the goals equitable? Do you really see a distribution of impact throughout the community by race?”* —BLACK LEADER



# Recommendations for the Field

## IMPLICATIONS FOR PRACTICE

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The results of this research have implications for practice within the environmental and conservation sector. These findings illuminate the work currently being done. They also serve as an opportunity for green organizations and their representatives to step deeper into leadership and address problematic behaviors while embracing innovation. The goal is to progress the field forward in becoming more authentic in actions and practices to achieve a more racially equitable and inclusive environmental movement. The following implications for practice are organized by individual, interpersonal, organizational, and sectoral levels.

### Individual and Interpersonal Implications for Practice

Collectively, individual and interpersonal change will impact an organization's ability to function as a more equitable and inclusive institution.

**Individual:** Individuals who serve on organizational boards need to be committed to vocalizing and taking the initiative to address behaviors that may be rooted in white supremacy culture while also advocating for greater systemic change.

**Interpersonal:** Individuals must not only behave and act in fair and just ways to promote DEI within their organizations, but they must also effectively recognize and manage their own unconscious biases, privileges, microaggressions, and micro-exclusions and must consider how these are displayed through their interpersonal communication. Board leaders who have engaged in deep training (outside and inside the boardroom) and have committed to continual interpersonal work have had greater success in promoting organizational improvements. Black leaders reported a greater likelihood of joining a board whose individual members are aware of their own privilege and responsibilities in uplifting and standing in power with historically excluded communities.

### Organizational Implications for Practice

Examining, developing, and implementing organizational practices and policies that promote fair and just operations within leadership will help build and sustain connections and relationships with Black leaders.

There are ramifications for organizations that are not creating sustainable methods of practice and that are disingenuously working under the facade of DEI. Sustainability and authenticity should be at the forefront of equity work to ensure that tokenism and harm are avoided and that trust is fostered. Organizations that have worked to incorporate

DEI through policy changes and internal practices have an increased likelihood of recruiting and retaining Black talent at the board level. It is important that all layers of an organizational structure incorporate equitable and inclusive culture. Examining a board's current culture and power structures, identifying methods of reform, and implementing changes as necessary can have significant impacts on the likelihood of attracting potential Black candidates. In sum, readiness of board culture, recruitment strategies, and retention efforts (3Rs) should be recalibrated to reflect the authenticity of a board's direction toward DEI.

### **Sectoral Implications for Practice**

Dismantling and rebuilding more empowered and diverse environmental and conservation organizations will increase relevance and sectoral impact.

The diverse, equitable, and inclusive transformation of individuals and organizations will have a greater impact on issues and concerns that the environmental and conservation field seeks to remedy. If there is any hope of creating broad-based solutions, representatives from all populations being impacted by environmental catastrophe, especially those most impacted, should be included in positions of power and leadership that are working toward solutions. By addressing monolithic systems with a history of white supremacy and homogeneity, there is a greater opportunity to advance the environmental movement.

### **RECOMMENDATIONS FOR READINESS, RECRUITMENT, AND RETENTION (3RS)**

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Recommendations from this body of work merge the lived experiences of Black leaders within the environmental and conservation field with the effective practices in which green board leaders are currently engaged. To successfully build and sustain inclusive board culture, boards need to:

Establish DEI metrics that go beyond demographic data collection. An annual (or quarterly) needs assessment should be conducted to determine and work toward minimizing discrepancies between DEI goals and current realities. To glean the broadest understanding of areas of deficiency and room for opportunity, both quantitative and qualitative methods of data collection should be developed and deployed.

Recognize the intersectionality of environmental and conservation work and social and racial justice. Without uplifting and working in power with the people most often harmed by environmental catastrophe, there is less likelihood of reaching organizational impact.

### **Readiness**

Be intentional, authentic, and explicit in developing and communicating DEI goals. Commit to being transparent with plans and progress, and take actionable steps toward making

good on statements made. When setting goals, make sure all members understand the requirement to be “on board” with moving the organization toward being a more sustainably equitable and inclusive institution while recognizing that it may be hard work and that it should be continual.

Prioritize the individual and interpersonal reflection and growth that is necessary for organizational transformation. For some board members, genuine and sustained change may require a deep shift in their own way of thinking, feeling, and showing up. Board culture can only be improved if the individuals who are part of an organization commit to doing better.

Dismantle, recalibrate, and rebuild systems historically rooted in white supremacy. It is important that organizations examine the structures and functions within their organization that may be impeding Black board leaders and be willing to advocate for and commit to policies, practices, and systemic changes grounded in DEI.

### **Recruitment**

Expand networks, create connections, and rethink strategies of recruitment to broaden leadership reach. Boards that have been successful in recruiting Black members have put forth the effort and have put excuses aside. White-centered networks tend to replicate themselves within board composition. To increase diverse talent, recruitment strategies need to be redeveloped.

Build the pipeline for Black leaders by working with historically Black colleges and universities (HBCUs), creating junior boards, funding fellowships and internships, and starting organizational chapters at colleges and universities. Be creative in recruitment efforts, and look outside the box in places such as Black candidate pools, professional affinity groups, executive search firms, and the organization’s own staff.

### **Retention**

Be inclusive with practices and policies by engaging, valuing, and acknowledging the skill sets and contributions of Black board members. Ensure that mentorship programs and onboarding methods promote an understanding of board culture and requirements as well as a presentation of resources to be successful on the board.

Remember that critical mass matters. Board leaders expressed a hesitation to tokenize Black leaders by focusing too heavily on diversity numbers and not enough on equity or inclusion. Tokenization is disingenuous diversity and creates harm. Black leaders do not always want to be relied on as the expert on diversity or the voice of diversity. By including more than one Black board member, the board may not only benefit by having increased talent and representation, but according to Black leaders, the board may also find that those members are more likely to stay.

# The Research

## LITERATURE REVIEW

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During the planning and design phase of the R2B project, a comprehensive scan of the research was conducted and informed the development of a literature review (Appendix A) and bibliography (Appendix B) surrounding DEI efforts within nonprofit boardrooms. While previous work has focused on inclusive and intentional DEI strategy development,<sup>11</sup> current findings confirmed that readiness, recruitment, and retention (3Rs) remain the major areas preventing authentic and sustained DEI progress within environmental NGO boardrooms. The 3Rs present different challenges and barriers and therefore require a multimodal approach when seeking solutions.

## DATA COLLECTION AND ANALYSIS

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KHA led the collection, analysis, and reporting of data from 74 interviewees. The research team garnered the experiences and expertise from two primary participant groups: 1) 7 board chairs and 16 CEOs/presidents of prominent green NGOs (board leaders), 8 ancillary professionals, and 4 green NGO leadership support staff and 2) 14 funders, 9 CEOs/executive directors, 4 consultants, 2 chief equity officers, and 10 practitioners with insight and experience in the environmental and conservation sector and board experience (Black leaders). It is important to note that the vast majority of Black leaders who were interviewed (36 out of 39) serve in some role on a board; thus, they brought a dual perspective to the conversations. A total of 16 Big Green organizations were represented by either the CEO, board chair, president, or executive director.

While some board leader participants requested that they be accompanied by staff from their organization during the interview, the interviewer ensured that board leaders were the primary source of information for all questions. Additionally, this project benefited from the inclusion of “ancillary professionals,” who possess a high level of experience and a deep understanding of DEI dynamics within the boardroom. Interviews with ancillary professionals were used to inform the project and research but were omitted when discussing green organization’s (board leaders’) responses specifically.

A series of interviews running from 45 to 60 minutes was held via the Zoom platform in early 2021. Interviews were recorded and transcribed with Rev software for qualitative analysis purposes. The interview protocols (Appendices C and D) were tailored to the two primary groups of participants: board leaders and Black leaders in the environmental and

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<sup>11</sup> Maya A. Beasley, *Beyond Diversity: A Roadmap to Building an Inclusive Organization*, Green 2.0, May 2017, [https://diversegreen.org/wp-content/uploads/2021/01/BeyondDiversity\\_Report\\_060517-1.pdf](https://diversegreen.org/wp-content/uploads/2021/01/BeyondDiversity_Report_060517-1.pdf).

conservation sector. Minor alterations were made when appropriate for interviews with ancillary professionals to ensure relevance to their involvement within the field. Alterations included the omission of questions relevant only to organizations. In these cases, participants were asked about board diversity, recruitment techniques, and retention strategies in a broader sense.

Quantitative data collection for demographics (age, gender, race/ethnicity) consisted of an ad hoc demographic survey sent to Big Green board leaders (CEOs, board chairs, presidents, or executive directors) via email. Of the board leaders who responded, 10% reported Hispanic, Latinx, or Chicanx and 90% reported white for race/ethnicity. The majority of participants were over the age of 50 (75%), and 60% of respondents were male and 40% were female.

Demographic data collection for Black leaders took place during the interviews: 62% of respondents were female, 36% were male, and 2% preferred not to respond. The majority of participants were below the age of 49 (82%).

During qualitative analysis, identifying information was removed from interview transcriptions to keep individual and organizational responses anonymous; interviewee transcripts were coded for recurring themes and patterns with NVivo QSR International qualitative analytical software. Identified areas of progress and barriers to advancing racial equity and justice within board culture were analyzed to demonstrate the opportunities for building inclusive culture. Additionally, thematic responses were analyzed to address learning questions and were also separated by groups – board leaders and Black leaders – for further evaluation.

## **STRENGTHS OF THE REPORT**

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The firsthand contributions garnered through interviews with board leaders and Black leaders involved in the environmental and conservation field is a major strength of this work. Board leader input illuminated the good work that is currently taking place as well as the support still needed to ensure that the environmental conservation space is one of genuine equity and inclusivity. Additionally, the ancillary professionals interviewed contributed to this project by advising on current work being done in this area, recruitment and retention methods, and board governance and structure more broadly. By including the voices of Black leaders, this report identified barriers and obstacles perpetuated by and rooted in systemic injustices as well as provided recommendations for enhanced practices, policies, and reform.

## **LIMITATIONS OF THE REPORT**

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A constraint of this report was the inclusion of only board chairs and members in leadership positions for the board leader interviews. Other board members' opinions and

experiences were not represented. Additionally, this report did not include data from all Big Green groups in the sector, and comparisons were not made for large and smaller green organizations currently working within the field. It is also important to note that this report was developed during a time in history when pressure is mounting for green organizations to consider the current diversity of their boards and to focus specifically on Black leadership. It will be important to continue assessing the field for sustainable and consistent change and reform within the years to come.

# Conclusion

Recruitment and retention of diverse leadership are current concerns of Big Green organizations, while readiness is seemingly less on the radar. Many board leaders expressed an awareness of current DEI work taking place at their organizations. However, boards are at varying levels of realization of and commitment to sustainable concrete plans for continuous operational practices, and board responses reflect a lack of organization-wide unified approaches. Although there is a recognized overlap between the “3Rs,” this research shows that readiness is a fundamental piece to engaging in authentic and genuine equity and inclusion and cannot be rushed through. Readiness is the starting point – both personally and organizationally – and must be prioritized. Black leaders are supportive of green organizations working toward becoming more diverse, inclusive, and equitable in practices and elevated the need to include those most impacted by environmental impacts in solutions and roles of leadership. Due to the historical white supremacy culture present in green organizations, Black representation has not always been welcomed. Therefore, there is hesitance and a lack of trust present that the field must work to overcome. If the environmental and conservation sector is to remain relevant and reach mission impact, intersections between social justice and environmental work must be centered and continually prioritized.

# APPENDIX A:

## Literature Review: Board Diversity

The diversification of the nation's corporate and nonprofit board culture is long overdue. In recent years, board composition has begun to slightly shift. Currently, California is leading the way in U.S. corporate board diversity with the implementation of legislation mandating that companies headquartered in California have at least one female director in place by the end of 2020 and at least three by the end of 2021.<sup>12</sup> Additionally, California lawmakers have passed a mandate that requires California-based companies to include at least one individual from underrepresented groups on their board by the end of 2021 and that by the end of 2022 corporations with four to nine directors include at least two individuals from underrepresented groups and corporations with nine or more include three.<sup>13</sup> This mandate is in response to the disparity between races in leadership roles. Companies across the United States are being called upon to take "The Board Challenge," a movement asking corporations to appoint at least one Black director to their boards in the next year.<sup>14</sup> Although these advancements are promising, statistics show that the progress across the nation has been incremental and insufficient. The call to action is clear: the sector must work harder to cultivate the necessary structural shift toward racial equity and inclusion in roles of leadership. This literature review will focus on current corporate and nonprofit board dynamics, benefits of and challenges in board diversity, and recommended solutions for ensuring racial equity and inclusion within the nonprofit board room.

### DEMOGRAPHICS

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Sporadic studies have looked at demographics within groups of board leadership, but the reportage on these statistics is optional; this makes diversity difficult to gauge. Reported demographics have often revealed disproportionate homogeneity within board composition. However, in the most recent BoardSource Leading with Intent report surveying 214 nonprofit organizations, 90% of chief executives and 90% of board chairs reported being Caucasian, while only 4% of chief executives and 5% of board chairs reported being Black/African American. Of the 1,378 chief executives surveyed, 65% were dissatisfied with ethnic and/or racial diversity within their organizations, while 40% of the 381 board chairs reported dissatisfaction. In other words, leaders recognize the

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<sup>12</sup> Corporations: Boards of Directors, SB-826, Sess. of 2018 (Cal. 2018), [https://leginfo.legislature.ca.gov/faces/billTextClient.xhtml?bill\\_id=201720180SB826](https://leginfo.legislature.ca.gov/faces/billTextClient.xhtml?bill_id=201720180SB826).

<sup>13</sup> Corporations: Boards of Directors: Underrepresented Communities, AB-979, Sess. of 2020 (Cal. 2020), [http://www.leginfo.legislature.ca.gov/faces/billTextClient.xhtml?bill\\_id=201920200AB979](http://www.leginfo.legislature.ca.gov/faces/billTextClient.xhtml?bill_id=201920200AB979).

<sup>14</sup> "The Board Challenge," 2021, <https://theboardchallenge.org/>.

<sup>15</sup> BoardSource, *Leading with Intent: 2015 National Index of Nonprofit Board Practices*, 2015, <https://leadingwithintent.org/wp-content/uploads/2017/09/LWI2015-Report.pdf>; BoardSource, *Leading with Intent: 2017 National Index of Nonprofit Board Practices*, 2017, <https://leadingwithintent.org/wp-content/uploads/2017/09/LWI2017.pdf>.



disparity in membership.<sup>16</sup> In another study conducted by Harvard Business Review, only 24 out of 1,000 corporate board directors surveyed identified as Black/African American.<sup>17</sup> Similarly, only 11.1% of Fortune 100 company board seats and 8.6% of Fortune 500 seats are occupied by Blacks/African Americans.<sup>18</sup> Although the majority of boardroom research examines corporate boards, data support the finding that the lack of diversity is also rampant within nonprofit organizations. Green 2.0 data, focused on environmental and conservation nonprofit leadership, illuminates and confirms the lack of diversity within leadership roles.<sup>19</sup> Black leadership roles at the board level are largely disproportionate to current U.S. demographic statistics. The past year brought mounting pressure and responsibility for those in leadership to respond equitably and to ensure that Black voices are heard. Collectively, the evidence unequivocally suggests a need for reform.

## BENEFITS

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The increase of diversity within organizations has been correlated with abounding benefits. It is evident that differing experiences and viewpoints can lead to invaluable cross-cultural insights, beneficially diverse skill sets, and inclusive action plans that support a more diverse population. By including groups of people who have culturally diverse experiences in dialogue and implementation of policy, there is greater flexibility and efficacy of application. Diverse groups tend to be more innovative when compared to homogeneous groups.<sup>20</sup> Furthermore, a diverse board externally communicates an emphasis on “understanding constituent needs, cultivating community connections, and establishing credibility.”<sup>21</sup> Leadership reflecting the communities represented can have a profound impact. It is also important to note that diversity within boards has been correlated with an increased degree of effectiveness in executive leadership, an increased recruitment pattern regarding diversified membership, and an increased level of community trust, transparency, and support. Collectively, these increases are an important grassroots conduit for nonprofit organizations.<sup>22</sup> Respondents to PwC: PricewaterhouseCoopers’s

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<sup>16</sup> BoardSource, *Leading with Intent: 2017 National Index of Nonprofit Board Practices*, 2017, <https://leadingwithintent.org/wp-content/uploads/2017/09/LWI2017.pdf>.

<sup>17</sup> J. Yo-Jud Cheng, Boris Groysberg, and Paul M. Healy, “Why Do Boards Have So Few Black Directors?” *Harvard Business Review*, August 13, 2020, <https://hbr.org/2020/08/why-do-boards-have-so-few-black-directors>.

<sup>18</sup> Alliance for Board Diversity, *Missing Pieces Report: The 2018 Board Diversity Census of Women and Minorities on Fortune 500 Boards*, Deloitte, 2019, <https://www2.deloitte.com/us/en/pages/center-for-board-effectiveness/articles/missing-pieces-fortune-500-board-diversity-study-2018.html>.

<sup>19</sup> Green 2.0, “2017 NGO Transparency Report Card,” 2017, <https://diversegreen.org/transparency-cards/2017-ngo-report/>; Green 2.0, “2018 Foundation Transparency Report Card,” 2018, <https://diversegreen.org/transparency-cards/2018-foundation-report/>; Green 2.0, “2018 NGO Transparency Report Card,” 2018, <https://diversegreen.org/transparency-cards/2018-ngo-report/>; Green 2.0, “2019 NGO & Foundation Transparency Report Card,” 2019, <https://diversegreen.org/transparency-cards/2019-ngo-foundation-report/>; Green 2.0, “2020 NGO & Foundation Transparency Report Card,” 2020, <https://diversegreen.org/wp-content/uploads/2021/02/green-2.0-2020-transparency-report-card.pdf>.

<sup>20</sup> Katherine W. Phillips, “How Diversity Makes Us Smarter,” *Scientific American*, October 1, 2014, <https://www.scientificamerican.com/author/katherine-w-phillips/>.

<sup>21</sup> BoardSource, *Leading with Intent: 2015 National Index of Nonprofit Board Practices*, 2015, <https://leadingwithintent.org/wp-content/uploads/2017/09/LWI2015-Report.pdf>.

<sup>22</sup> Patricia Bradshaw and Christopher Fredette, “Determinants of the Range of Ethnocultural Diversity on Nonprofit Boards: A Study of Large Canadian Nonprofit Organizations,” *Nonprofit and Voluntary Sector Quarterly*, 42, no.6 (2013): 1111–1133.

2019 Annual Corporate Directors Survey stated that board diversity not only led to manifold thinking but also improved board performance and relationships with investors.<sup>23</sup> Research examining the impact of racial diversity on corporate and nonprofit companies is clear: diverse outlooks, experiences, skill sets, and voices have been shown to improve and strengthen board performance in a multitude of domains, including profit, productivity, relationships, and innovation. According to one 2016 study, board governance may flourish with inclusion of diverse members, but this is partly dependent on board culture and behavior.<sup>24</sup> This effect is amplified if boards act inclusively and policies and practices allow diverse membership to be influential. Essentially, a board's readiness can moderate effectiveness of diverse membership.

## CHALLENGES/BARRIERS

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### Lack of Readiness

Discussions regarding the importance of racial diversity in the upper echelons of organizational leadership roles are certainly prevailing, but there seem to be impediments in actualizing a large shift in company practices and policies. Having diverse individuals occupy board seats is not sufficient in changing board culture. As researchers at Green 2.0 state, "Diversity without inclusion is tokenism. Diversity without equity is segregation. Diversity without accountability does not promote justice."<sup>25</sup> To reap the benefits that diverse membership may bring, boards must take responsibility for cultivating genuine inclusivity and equity. By recognizing the need for inclusive and equitable policies and practices, boards have an opportunity to expand their scope and impact within the populations they wish to represent and serve. According to Mercer's Mergers and Acquisitions (M&A) Readiness Research Report (2017), corporate board culture's main influencer is the board leader's behavior.<sup>26</sup> If a cultural shift is necessary to aid in more inclusive and equitable practices, the onus may lie at the top. In congruence with cultivating accountability of leadership, a report from Korn Ferry finds that boards may most benefit from:

a leader who takes a collaborative and facilitative approach as opposed to one characterized by command and control. A leader who operates transparently rather than behind closed doors. A leader who is culturally agile, not tied to their own

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<sup>23</sup> PricewaterhouseCoopers, *The Collegiality Conundrum: Finding Balance in the Boardroom: PwC's 2019 Annual Corporate Directors Survey*, 2019, <http://www.circulodirectores.org/wp-content/uploads/2019/12/pwc-2019-annual-corporate-directors-survey-full-report-v2.pdf>.

<sup>24</sup> Kathleen Buse, Ruth Sessler Bernstein, and Diana Bilimoria, "The Influence of Board Diversity, Board Diversity Policies and Practices, and Board Inclusion Behaviors on Nonprofit Governance Practices," *Journal of Business Ethics*, 133, no. 1 (2016): 179-191.

<sup>25</sup> Green 2.0, "2020 NGO & Foundation Transparency Report Card," 2020, <https://diversegreen.org/wp-content/uploads/2021/02/green-2.0-2020-transparency-report-card.pdf>.

<sup>26</sup> Mercer, *Executive Summary: Mitigating Culture Risk to Drive Deal Value*, 2018, <https://www.mercer.com/content/dam/mercero/attachments/private/gi-2018-executive-summary-mitigating-culture-risk-to-drive-deal-value.pdf>.

worldview. A leader who is able to fully embrace and leverage the vast diversity of today's workforces. A leader who can create a safe space, regardless of what is happening externally, where people feel accepted and empowered to give the best of their talents. In essence, an inclusive leader.<sup>27</sup>

This research signals a need for preparedness at the board level of nonprofit and corporate organizations; this need for preparedness may be most effectively influenced and initiated by those at the very top.

### Problematic Recruitment Strategies

When assessing barriers to increased racial diversity in board membership, *Harvard Business Review* found that recruitment practices are partially to blame. If current board membership has no representation from racial or ethnic minority groups, the probability of recruiting racially diverse applicants into leadership roles is lessened. Boards that already include one or more individuals from racial minority groups are much more likely to select additional multicultural members. This means that in a predominately white-structured board environment, the likelihood of creating diversity is reduced.<sup>28</sup> Board recruitment typically occurs through relationships that board members have previously established. A predominately white board directorship is statistically less likely to be cognizant of Black board candidates and therefore may not have a developed methodology for diverse recruitment. Likewise, appointed Black individuals in director roles are more likely to have a previously established relationship with someone on the board, with one of the other directors, with the chief executive officer (CEO), or with a member of executive management. The other method of bringing diversity to the boardroom relies on delegating an executive search firm to recruit members. The *Harvard Business Review* article goes on to state that these findings provide evidence that executive search firms may be helpful in recruitment of more diverse membership. The article's findings are clear in "suggesting that the internal pipeline to the board is dominated by white executives."<sup>29</sup> To further illustrate recruitment practices reinforcing racial and ethnic disparities, Barry Lawson Williams found in his "Black Corporate Directors Time Capsule Project" that more than 80% of all board searches were relationship driven and did not involve executive search firms.<sup>30</sup>

### Obstacles with Retention

According to research looking specifically at retention of diverse membership in environmental nonprofit organizations, "the factors that impact retention are likely to

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<sup>27</sup> Andrés T. Tapia and Alina Polonskaia, "The 5 Disciplines of Inclusive Leaders: Unleashing the Power of All of Us," Korn Ferry, accessed June 6, 2021, <https://infokf.kornferry.com/rs/494-VUC-482/images/Korn-Ferry-5-Disciplines-of-Inclusive-Leaders.pdf>.

<sup>28</sup> Cheng, Groysberg, and Healy.

<sup>29</sup> Cheng, Groysberg, and Healy.

<sup>30</sup> Barry Lawson Williams, "Black Corporate Directors Time Capsule Project," March 2020, <https://barrylawsonwilliams.com/bcd-time-capsule>.

be multi-level, including effects of top-leadership, DEI [diversity, equity, inclusion, and justice] practices at the organization, and individual perceptions of DEI practices and inclusion.”<sup>31</sup> Furthermore, when individuals do not feel valued, they have a lower intent to stay. In support of this, it has been found that groups should not only focus on practices and policies but also on actual behavior and culture within the board – inclusive culture can increase retention. To create inclusivity of diverse members, an integration and learning approach is suggested;<sup>32</sup> this entails inviting diverse members to bring their perspectives and lived experiences into the boardroom, learning from differences, and showing that diverse members are valued. Organizations that have been successful with retaining diverse staff have been intentional in implementing both strategies and practices. For example, the *Jemez Principles* for Democratic Organizing are incorporated in some organizations’ work.<sup>33</sup> These are a set of principles used to guide an organization in ensuring that equity and inclusion remain present in their work. It is important that an organization is examining multiple facets of the institution to keep as many diverse members as possible.

## SOLUTIONS

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Board membership clearly lacks racial diversity. Interestingly, many corporations recognize the inequality in their board membership but perceive challenges in altering archaic board structures and bolstering their recruitment process toward being more inclusive and equitable in furthering racial diversity. By discussing successful diversity, equity, and inclusion (DEI) techniques that have been used to build diverse boards and leaders, the field may begin to examine what methodology produces actual change and may inform next steps. In an attempt to do exactly that, Williams recently conducted a seminal project surveying experienced Black directors to create a schema for guiding future Black leaders.<sup>34</sup> Some of the main suggestions for progressive steps are laid out as follows:

...identify more potential Black candidates for board service and train/mentor them (especially women candidates)...; get more candidates for board service in leadership positions on not-for-profit boards (and civic and industry organizations)...; support existing black corporate board members in their diversity efforts (including in procurement and philanthropy)...; [and] we need CEO’s, Lead Directors and Chairs of Nominating & Governance committees to meet aspiring Black candidates for corporate boards.<sup>35</sup>

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<sup>31</sup> Stefanie K. Johnson, *Leaking Talent: How People of Color Are Pushed out of Environmental Organizations*, Green 2.0, June 2019, [https://diversegreen.org/wp-content/uploads/2021/01/Green\\_2.0\\_Retention\\_Report.pdf](https://diversegreen.org/wp-content/uploads/2021/01/Green_2.0_Retention_Report.pdf).

<sup>32</sup> Ruth Sessler Bernstein and Diana Bilimoria, “Diversity Perspectives and Nonprofit Board Member Inclusion,” *SIAS Faculty Publications*, University of Washington Tacoma, 2013, [https://digitalcommons.tacoma.uw.edu/cgi/viewcontent.cgi?article=1644&context=ias\\_pub](https://digitalcommons.tacoma.uw.edu/cgi/viewcontent.cgi?article=1644&context=ias_pub).

<sup>33</sup> “*Jemez Principles* for Democratic Organizing,” *Ejnet.org*, 1996, <https://www.ejnet.org/ej/jemez.pdf>.

<sup>34</sup> Williams.

<sup>35</sup> Williams.

Connections must be created and nurtured to allow for sustained change in board culture. There is also a great need for education and training in current organizations lacking fundamental heterogeneity. Those organizations leading the way in leadership transformation should be supported and publicly esteemed as prime examples of progressive board culture.

According to Deloitte, the following recommendations should also be incorporated in board practice:

- engage in more vigorous efforts to achieve board diversity, including more robust processes for sourcing and evaluating diverse candidates;
- adopt broader definitions of diversity while continuing to focus on the role that gender, race, and ethnicity can play in shaping perspectives and experiences;
- abandon simplistic board composition tools in favor of more sophisticated tools and programs that link board composition to the organization's strategic needs; and
- move beyond exclusionary search criteria, such as board or CEO experience, to include more holistic and flexible ways of identifying and selecting candidates.<sup>36</sup>

The field must continue to take deliberate action in reworking board leadership structures to increase equity and inclusion for Black, Indigenous, and people of color (BIPOC).

## **RELEVANCE AND PURPOSE**

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While the awareness of necessary racial diversity within boardroom membership seems to be apparent to corporations, concrete implementation blueprints are lacking. The Deloitte survey found that although 90% of directors express interest in broadening diversity within their corporations, few have an effective recruitment process and are often unsuccessful in obtaining racially diverse board membership.<sup>37</sup> A methodical pipeline is virtually nonexistent, and typically these companies recruit members through antiquated techniques. The interest is there, but the practice is not. Based on the findings of this literature review, most of the focus in corporate and nonprofit boards has been on increasing gender diversity, and far less has been done to increase racial/ethnic diversity.

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<sup>36</sup> Deloitte, "Seeing Is Believing: 2017 Board Diversity Survey," 2017, <https://www2.deloitte.com/us/en/pages/about-deloitte/articles/board-diversity-survey.html>.

<sup>37</sup> Deloitte.

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## APPENDIX C:

# Board Leadership Interview Protocol

1. How long have you worked in your current role at \_\_\_\_?
  - a. In the context of the environmental and conservation field, what else should I know about your professional background?
2. How important is board diversity for “green” organizations on a scale of 1 to 5 (with 1 being Not at all important and 5 being Very important)? Please explain your rating.
3. How important is board diversity for your organization specifically on a scale of 1 to 5 (with 1 being Not at all important and 5 being Very important)? Why?
4. How diverse would you say your board is with regard to race, ethnicity, and gender? How many Black men or women are on your board?
  - a. How do you track board demographics?
5. Why do you think that there are not more Black board members on your board (e.g., lack of connection, lack of interest, limited promotional sources, etc.)?
6. Please describe any internally inclusive policies and practices that are implemented by or within your board culture.
7. What do you think would help further increase your board diversity, specifically Black board members?

Prompt or follow-up questions:

  - a. What would be helpful with recruitment efforts? How to build the pipeline?
  - b. What would be helpful with retention efforts?
  - c. What else would be helpful in further increasing your board diversity?
8. Would having more Black board members lead to better outcomes for your organization (e.g., more effective strategies, amplifying message, etc.)? Why or why not?
9. Please describe what data the board uses to measure your progress. Are there any measures that look at one to five years of progress? Are any of the data disaggregated by race?
10. Please describe your board’s understanding of how structural racism shows up in environmental justice.
11. What strategies have you found to be pivotal in operationalizing and supporting environmental justice?
12. Would you like to provide additional information for any of the questions I asked you today?

## APPENDIX D:

# Black Leadership Interview Protocol

1. How long have you worked in your current role at \_\_\_\_?  
What else should I know about your leadership experience? What should I know about your background in the context of the environmental and conservation field?
2. Do you think it is important to serve on boards at nonprofit organizations? Why or why not?
3. Have you served on a board? If so, please describe your experience (both positive and negative).
4. Why did you decide to join the board? Or why have you not joined a board?
5. Do you think it is important for boards to be diverse and include Black leaders? Why or why not? What about “green boards” – those at large environmental and conservation nonprofits, specifically?
6. Can you describe specific benefits to having a more racially and ethnically diverse board?
7. Are there challenges involved in having a more racially and ethnically diverse board? Please explain.
8. What do you think “green groups” can or should do to ensure more inclusive and more racially and ethnically diverse boards?
9. What would you as a Black leader want from a board to feel valued and included? Please discuss:
  - a. Any specific recruitment strategies
  - b. Any specific onboarding/preparatory strategies
  - c. Any specific retention efforts
  - d. Any specific board structures or inclusive policies
  - e. Anything else?
10. What could you personally bring to a “green board”?
  - a. Any specific expertise?
    - i. Fundraising capacity
    - ii. Legal background
    - iii. Governance experience

- iv.** Community relations
  - v.** Climate justice background
  - vi.** Any other experience (e.g., other sector or industry)
- 11.** What type of data would you want to see to measure the board's progress toward becoming a more inclusive and diverse entity (e.g., progress implementing procedures or strategic plan, progress toward quantitative goals, etc.)?
- a.** Can you think of any data or metrics that are especially relevant for environmental and conservation organizations?
  - b.** What data should be reviewed for one to five years of progress? Should any of the data be disaggregated by race and/or ethnicity?
- 12.** Would you like to provide additional information for any of the questions I asked you today?





