

REALITIES

A Diversity, Equity, Inclusion and Belonging Talent Management Education Series Brought to you by Nonprofit HR and partners!

Inclusive Workforce Planning & Diversity Practices in Nonprofits

WEBINAR TRANSCRIPT



Nonprofit **HR**

REALITIES: INCLUSIVE WORKFORCE PLANNING & DIVERSITY PRACTICES IN NONPROFITS

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Strategic workforce planning connects HR strategy to overall organizational strategy. It ensures that social impact organizations have the right people in the right place at the right time. However, only 5% of 2019 Nonprofit Diversity Practices Survey respondents initiated a diversity strategy due to less than optimal organization performance.

Discussion topics:

- How to assess and rework your workforce plan by using a lens of diversity and inclusion
- How to ensure your workforce planning practices leverage the full diversity of your staff
- How to create strategic workforce planning practices that reflect the workforce of tomorrow

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Atokatha Ashmond Brew: Hello, and welcome to the Nonprofit HR's webinar, Inclusive Workforce: Planning and Diversity Practices in Non-profits. Thank you for joining us today. My name is Atokatha Ashmond Brew and I am Managing Director for Marketing and Communications for Nonprofit HR. I will be your moderator today. We have a lot of great content to cover, so let's get started. However, before we do that, I'd like to go over a few items so you know how to participate in today's event. You've joined the presentation listening through your computer's speaker system, by default. If you would prefer to join over telephone, just select telephone in the audio pane, and the dial in information will be displayed. You will have the opportunity to submit text questions to today's presenter by typing your questions into the questions pane on the control. You may send in your questions at any time during the presentation. We will collect these and address them during the Q & A session at the end of the presentation.

Today's webinar is being recorded, and you will receive a follow-up e-mail within the next few days with a link to view the recording. Today's session will be presented by Lisa Brown Alexander, CEO for Nonprofit HR. Lisa Brown Alexander has inspired Nonprofit HR to become a force which thousands of non-profits and talent management leaders look to for consulting services, partnerships, sector-specific hiring, executive search needs, professional development and information. Lisa's leadership and the work of the firm have proven that better talent practices can play an integral role in non-profit success. Non-profits have benefited from her wealth of knowledge and experience to make their people-driven initiatives successful. Lisa's goal is to ensure that every Nonprofit HR engagement inspires social sector leaders to strengthen their most important asset: their people. Without further ado, I hand it over to you, Lisa.

Lisa Brown Alexander: OK, so thank you so much for joining us. I'm Lisa Brown Alexander. I'm going to ask you to just advance the slides for me, if you would.

Alright. Good afternoon, again, everyone. We're excited about this topic.

Obviously, we're all dialed into the current events around us. The Realities Series will take you through a series of conversations about the various elements of talent management and looking at those components of talent management through an equity lens.

This afternoon, we're going to spend some time talking about workforce planning: why it matters; understanding and getting a better sense for who's on your bench, who's on your staff, who's in your workforce; how to determine who is next in line for opportunities as they become available; then, helping you identify some strategies for building an equity into your workforce planning activity.

Alright, let's continue.

So, let's talk about workforce planning. When we talk about workforce planning, what are we referring to? We're really talking about the exercise or the activity that an organization

uses. The analysis that you would use to align your workforce composition with your long-term, and short-term, organizational strategy and business needs. It is looking at who you have in your organization as it relates to what it is you say and what you want to accomplish.

Said another way, workforce planning is really the process that you use to ensure that you have the right number of people with the right skills, and the right roles in place at the right time, to deliver on your organization's goals and to ensure that you are an impactful organization. That's really what we're talking about when we talk about workforce planning.

So why does it matter? Particularly right now? As we find ourselves in the midst of dynamic organizational change, either as a result of the coronavirus crisis that we find ourselves living in and through or as a result of other organizational dynamics including social unrest and the new call for social justice, workforce planning is particularly important in times like this. This is because it enables you to really be more resilient as an organization to plan for the use of your assets within your organization in order to ensure that you're eliminating surprises, that you're identifying your various business cycles, and then have a talent plan that aligns with that in terms of who you have and what roles at what time.

There are actually four key components to workforce planning. The first is to set strategies and priorities based on what it is you say you're trying to accomplish as an organization. Whether it's expanding your program offerings, expanding projects, or shifting in your mission focus, all of that needs to be taken into consideration when you're planning for your workforce. Establishing what your talent priorities are in relation to those shifts, those expansions, and those retractions in some cases, is where workforce planning really is important, right? So, setting priorities and strategies is your first step.

Next, you want to assess your current skill base.

Who do you have on your team, on your bench?

What is it that you have in terms of your workforce composition?

Evaluate the current composition of your team, not only by skills, but also the age, the gender, the race, the ability, and the demographics of those who work in your organization. That's really, really important for you to effectively get through the workforce planning process.

You'll also want to forecast your future needs. So, one is looking at current needs, your current demographics and the other is looking at those demographics against the future.

How will the workforce change?

What is your population doing in your region, and where is it moving to?

That way you can understand how you need to adjust your recruiting activity and your talent acquisition processes, so that you can identify the right talent to support your organizational strategies. That's the forecasting component of workforce planning.

Then what you'll want to do is after the current analysis and the future analysis, adapt strategies to help fill the gaps between supply and demand. There is who you have and who you need, what's the gap between those two things?

What skills and what composition of talent do you need to fill those gaps to ensure that your organizational goals and objectives are met?

Many of you know this already, but this is a refresher for those of you who are familiar with and have gone to workforce planning before. For those of you who have not, this is a very quick primer to set the stage for our conversation today.

The four elements of workforce planning: priority setting; current analysis of the work team; looking at the future to understand who you need, who will be around you, who's available to you from a talent perspective; and then looking at your current staff and at your future goals and strategies to identify where you might have some gaps and where you may need to fill those gaps with either new talent or the redeployment of talent.

So, a big part of workforce planning is the analysis piece, right? It's looking at the supply, who is in your current labor supply for your region, for your city? Or, if you're a national organization and are kind of boundary-less and border-less, then looking at the national labor supply. You'll also want to review and understand your business plans and objectives in order to understand what your demand will be for talent. Again, we mentioned that before, but there's a supply analysis and then there's the demand analysis. Followed by that, there's the gap analysis that we talked about already, that gets the skills.

What skills do you need to close the gap between supply and demand?

Where do you have perhaps excess talent or surplus talent?

Then, where do you have to deficiencies?

When it comes to solutions finding solutions, that's where you really want to analyze and implement the strategies that you need to fill those gaps, right? That's the solution. That's where you find people to meet your future needs. So, four components of the analysis process: supply analysis, demand analysis, gap analysis and solution analysis.

Ultimately, all of this matters for a couple of really important reasons. The first of which is your talent, the talent in your organization, whether it's the Executive Assistant or the Executive Director, the talent in aggregate is your most important tangible asset.

As a non-profit leader, as an HR leader, the investment, nurturing, and cultivation of your talent is how you make a difference in the communities where you serve. Without talent, without the people to do the work, it is almost impossible to advance the mission. I wish we talked about this more as a sector, but we don't. What my hope is that as we continue to look at talent more and more, there'll be a greater appreciation for the importance of talent. It is as important as fundraising, finance, and programs. Those of you who have followed me and heard me speak before, that's of no surprise to you, this position that we've taken at Nonprofit HR. However, your talent is your most important tangible asset and therefore warrants planning, just like you plan for strategy and program impact.

We also know that workforce planning matters because, ultimately, your ability to understand who you need and when you need it will help to drive your organization's productivity. It'll help you cut unnecessary labor costs and it will also improve your financial performance as an organization, which even as a non-profit is important, and will help to drive innovation.

Ultimately, it will dramatically enhance organizational impact.

Why? Because you're going to have the right people and the right roles at the right time in the right places.

If you don't plan for that, you may end up with the wrong people in the wrong roles at the wrong time and we know that there are real costs, both measurable costs and costs that are not measurable.

When we don't have the right people in our organizations, productivity is lost, morale is undermined, labor costs are higher than they need to be, our financial performance might be impacted, our relationships with our donors, and our funders may be impacted. We really won't be as innovative and as creative as we need to be if we don't have the right people in our organization.

All of this is why workforce planning matters.

So, let's talk about who's on your bench. Let's talk a little bit about that, the supply analysis. Who do you have in your organization?

Understanding your organization's workforce composition is an exercise in risk management. While you may not think of workforce planning as risk management, but it absolutely is. What is your capacity and what is your risk capability? What do I mean by that?

What I mean is who do you have? What kind of capacity do you have to manage, from a talent perspective, the various scenarios that your organization might face?

Do you have the right people doing the right thing at the right time?

Do you have the right number of people and do those people have the right skill set and capability to meet your future needs?

Do you have the right skill set and numbers of people to meet your current needs?

We do a lot of work with non-profit organizations around organizational assessment. What we often find is that there is a disconnect between what it is you say you're doing as an organization and who you have within your organization. So, by managing your workforce and engaging in workforce planning, you're mitigating risk associated with having the right number of people or the wrong number of people. You're also mitigating risks associated with having the wrong skill set or the right skill set, depending on the lens you look through. So, it's really important to understand your workforce composition.

What do you know about the composition of your organization's workforce? This may seem like a very straightforward answer. Of course, I know I have 52 FTEs. I've got five people in this location, 10 people on another, and 12 people in another. This is not what I'm talking about.

What I'm talking about is, what is the age range of the staff that you have? Your gender composition?

Your racial composition? Composition as it relates to skill sets?

Who do you really have? Do you know that? Have you quantified that? At a moment's notice, if your Executive Director said to you, give me a demographic breakdown of the overall workforce, could you provide it?

More importantly, once you know what that composition is, what does that mean through your planning effort?

Do you have a large contingent of people who are preparing for retirement? If so, what does that mean for your organization? What does it mean for your ability to continue the work of your organization in a way that is not disrupted or in a way that doesn't negatively impact your staff? So, understanding your workforce composition is an important part of workforce planning.

We also want to know about the capabilities of your staff, not just who you have, and how it relates to the future of available talent, right? We also want to know what the skill that composition is like of your staff.

I want to go back just for a second to this notion of composition and the number of people capacity that you have. The data tells us that by 2045, for example, the population of Caucasians in the United States is projected to drop below 50% to 49.7%. We also know that Hispanics will make up just under a quarter of the population at 24.6%, Blacks will make up 13%, followed by Asians at 7%, and those who identify as multi-racial at 3.8%. If your organization is seeking to be

a diverse, racially diverse organization, what does that mean for where and how you seek out talent? So, that's a capacity issue.

When it comes to capabilities, what skill sets do you have today? As well, what is your plan for developing skills that to meet the needs of the future? This is important to work because without understanding our workforce composition, both capacity and capability, we have the potential to not realize our goals. By being proactive in our hiring processes, it's really important to understand both aspect capacity and capability.

Let's spend a little time digging more deeply into this bench-strength conversation. Again, we're talking about composition and supply analysis. Who's on the bench? It's important to understand, particularly if you put an equity lens on your workforce planning, to understand who you have and how that composition relates to the world around you, right?

So, if you're in the middle of Washington, DC, or San Francisco, both very diverse communities, and your organization doesn't either reflect the diversity of the community around you, or more importantly, the diversity of those you serve, then there's an opportunity to close that gap, right? It's not just understanding census data going forward, but it's also understanding who you serve and ensuring, if it's important to your organization, that the demographics of your organization reflect those of the communities that you serve. It may be important for you to have better gender balance. We know that more than 70% of the non-profit workforce is female.

If you look around your organization, who is on your bench?

Who's on your leadership team? Is your leadership team primarily comprised of men? Is it primarily comprised of women? Or is it a balance? A balance that is reflective of the rest of your organization or reflective of your available workforce?

These are important things to know if you want to really engage in equitable workforce planning practices.

Understand the racial composition. We know from a number of published reports, that both non-profit boards and non-profit leadership teams are primarily white, regardless of the location of the organization.

Now, how much of that is reflective of what is happening within your organization and in the communities where you reside? Is that a reflective balance? Do you consider that an equitable workforce composition?

These are the kinds of things that you'll want to look at, so pull your employee data and look at age, look at gender, look at race, look at identity, look at earnings. That's an entirely different subject, but it's important to understand that as well.

Examine your turnover and recruitment data to understand things like vacancy lengths, recruitment rates, turnover, and the number of applicants you have for any given position. How many applicants do you interview for vacancies that fit into these demographics? It's important so that you can understand whether or not you have a gap in the demographics.

When you go looking to fill a position, are 99% of the applicants women? Are 99% of the applicants men? Or are 99% of the applicants people of color versus white people? It may not be that absolute, but understanding that and analyzing that data can help advance your workforce planning objectives.

You'll also want to take a look at internal influence. What do we mean by that?

What we mean is that the decisions that organizations make around programmatic direction and budget cuts and external pressures will all influence your composition or your supply analysis.

Where's your organization going from a programmatic standpoint? What is your financial situation? What are the external factors and internal factors facing your organization that could influence who you need now, and who you might need in the future?

We also, of course, as part of the supply analysis, want to look at current competencies. We've talked about this a few times now, and I wanted to drill it in because it's really important to understand the skill sets, the strengths, the weaknesses of your workforce.

There's software that can help you with this, but some of it is old-fashioned rolling up your sleeves and analyzing who is in your organization, what skills they have, and how those skills fit with your future.

Then finally, don't forget, you're competing with the non-profit organization next to you, the non-profit organization up the street, the non-profit organization across town.

We know that many emerging professionals and others and actually folks of all ages are looking for meaningful work.

However, you're no longer just competing with non-profits. You're also competing with social enterprise. You're competing with corporate social responsibility programs that are connected to large brands and smaller brands as well.

That is your competition for talent.

So, it's important for you to understand that, to the extent that you can get exposure to more information about their workforce strategy, as you plan for your own.

These are important things to understand. You know I want to pause, just for a little bit, to see if we have any questions to make sure we don't go too far down the road before answering questions, if we have any.

Atokatha Ashmond Brew: Yes, we do have some questions.

How does one obtain such staff demographic data? Should an employer ask employees to self-identify in terms of gender and ethnicity? How may an employer conduct such survey without seeming intrusive or possibly discriminatory?

Lisa Brown Alexander: That's a great, great question. Well, it's OK to ask your staff to self-identify. That's really the best way to do it. You may look at someone and make assumptions about their age, their gender, their ethnicity, or how they identify, and so with asking people to voluntarily provide that information, is a great way to do it.

Asking the question in and of itself, is not discriminatory.

What becomes discriminatory is if you take employment actions as a result of how someone identifies in your organization. The act of asking for demographic information, in and of itself, is not a problem. It's important to ask that if you want to really understand your workforce composition through an equity lens and to ensure that you have a holistic approach to workforce planning. So, asking the question is not the problem, it's when you take discriminatory actions against people as a result of how they identify— and that's an entirely different matter.

However, be transparent with, your staff. Help them understand that you're trying to engage in a workforce planning exercise and you want to understand who you have in your ranks and in order to be most accurate, you want the staff to identify to you the way they see themselves.

That would be my answer to that. Do we have another question?

Atokatha Ashmond Brew: Here's another. What do you do if you are now bare bones because layoffs due to COVID-19 impacts, decreased programming or do more with less?

Lisa Brown Alexander: Yeah, that becomes a little more challenging. The workforce planning may not be your top priority if you're just trying to hold your organization together. But someone, whether it's your Executive Director or someone from your leadership team, needs to keep their eye on the ball.

Because hopefully, your organization will get to a place where it can get past the coronavirus and get back to not being as lean and mean, and what will you do then?

What's important to understand, especially if you have limited resources, is who you need and when you need them so that you don't waste financial resources on talent. Keep in mind that your payroll, your salary, and benefits costs are likely to be your most significant expense on your budget, so making talent mistakes will cost.

Plus, if you're in a lean and mean situation because of COVID, you don't want to waste money, nor do you want to waste time.

My suggestion would be to take advantage of your payroll system and ask your payroll provider to help you with gathering demographic information, that way you're not having to do it manually. If you don't have a payroll system like ADP or Ceridian or Paychecks, then you may have to resort to Excel spreadsheet. However, it's an important and helpful exercise, particularly if you know that your organization will ultimately get through this tough time and need to rehire in the future.

I hope that was helpful.

Atokatha Ashmond Brew: We have a lot of other questions.

Lisa Brown Alexander: A lot of other questions? OK, well, should we keep going or should we take another one?

Atokatha Ashmond Brew: Ah no, we can just keep going.

Lisa Brown Alexander: Alright, let's keep going. Sounds good.

So, we're still talking about who's on your bench. A lot of us are struggling right now, we're looking internally, and we're saying our organization is not reflective of the workforce composition that we want, for whatever reason. Whether it's by gender, by age, by race, by whatever those dimensions of diversity are that we struggle with.

But, how did you get here? How did you arrive at a place where you might have a homogeneous organization? This is where workforce planning gets a little more challenging. We move away from the mechanics to really start examining how we arrived where we are.

The question to ask ourselves is, how are the systems, and the people in our organization, perhaps contributing to our current workforce composition and capabilities? Are the biases built into our organization that are perhaps contributing to what we are, or how we're composed as an organization? That's a difficult question, right? That's where we start to look at issues like bias and things like, do we have bias in our decision-making? Do we have bias built into our promotional activity, our hiring practices, or our leadership development investments? This is because all of those things can contribute to sameness or the lack of diversity that many of us are really anxious to have right now. Particularly in light of this renewed awakening around racial justice, and racial equity and equality. So, that's a difficult decision. How did you get where you are if you're not where you want to be?

Right. So, let's go to the next slide and let's unpack that a little bit more.

What I would like you to do is this. As you think about the composition of your workforce, both staff and leadership, there's some questions that you want to ask yourself about who's up for next opportunities. However, in order to make those assessments, you have to first understand what challenges exist within your decision-making frameworks and whether or not you need to step back and analyze those who makes decisions about talent within your organization, to be sure that you're not undermining your efforts to be an equitable organization. That requires an equity assessment.

Separate and apart from workforce planning, what systems and what is happening with the people in your organization and the decisions that they make, as it relates to talent, that may be creating some additional challenges within your organization, from a talent perspective?

Then, you can move to this conversation about “who's got next.”

Some of you may be familiar with that term. It is a common term used in basketball, when players are playing pickup basketball or an unstructured game. Someone who is ready to get out of the game will look back and say, “Who's got next? Who's coming in next? Because I'm getting ready to leave.”

Think about it like succession planning. As people leave the organization or move into new roles, who is being prepared for those next opportunities? How much of those decisions about “who's got next” are being negatively influenced by implicit bias or unconscious bias? How many of those decisions are being influenced by those factors? What systems do you have within your organization that might be creating challenges for building an equitable organization?

So, when we think about “who's got next,” we are thinking about things like who are your key players? Who are your key leadership players? Some of you have already gone through succession planning exercise, and that's essentially what a succession planning exercises is. Who are your key players and if someone were to leave unexpectedly, or even leave on a planned basis, who would fill those roles in key positions within your organization?

However, you first have to identify what your key positions are. So, who are the key players? Who do you see is capable of leading? That is a trickier question. It's not so much the obvious leaders are, but who do you see as capable, and why you see them as capable or incapable? We'll talk about that in a second.

So, who will be the people that you choose to fill those future opportunities? What criteria will you establish, or have you established, for who sits in what seat in your organization? Is it based on where they went to school? Their relationship with other key players in the organization? Their social influence? I hate to say it, but their gender? Is that a contributing factor? Really think through it.

This is where the critical work comes in with workforce planning, it is thinking about the criteria that you set and whether or not any of those criteria are undermining your effort to be an equitable organization.

What barriers might you have set unnecessarily or even unintentionally within your organization to make it less accessible for a diverse group of people to access those opportunities? This is what we want you to think about. What criteria have you set and are those criteria really critical? Are they essential to what it is that you're trying to do as an organization or are they just practices that you've perpetuated over the years?

We also want to take a look at organizational practices and systems that help you identify promise and potential.

Do you have extensive recruitment processes within your organization?

Do you use recruitment teams or screening teams as a way of diversifying who gets to make the decision about who comes into your organization?

These are just some of the things that you'll want to consider and examine. Take them apart, put them on a table, and really examine what practices and systems within your organization are not only helping you find people and move people into roles, but also help you even consider staff who may have promise and potential. It really requires a discovery process. A lot of us are anxious to jump into fixing the wrongs that have occurred over hundreds of years and I applaud every single one of you and me, really, we all want to do it.

But, how do we really spend time in discovery to make sure that we understand the underlying systems and practices within our organization that could impact this very question about who is eligible for the next opportunity, who has promise, and who has potential?

We want to look at it both from the promise and the potential side, but we also want to look at what might be limiting that analysis around promise and potential.

As equally important as the who is the why.

Why have we identified those that we have within our organization as key players?

Now, that may seem like a really obvious question, but really why? Why do we do that?

Why do we identify certain people as ready, able, and as having lots of potential and others as not? What, in our own thinking and our own systems, is contributing to our decisions around what and why and when, right? Why do we see certain individuals as leaders and not others?

Again, we're talking about workforce planning. Yet now, I'm really trying to get into this concept of equity, and how equity plays into the decisions we make about who is seen as a leader and who is not seen as a leader.

Why do we see certain individuals as leaders and why do we see others as not leaders?

Think about that.

Have an intentional conversation at your leadership team level, management staff, or whatever the appropriate level is within your organization, about the why.

The who might be easier, but the why is a lot more difficult. Really examine those practices against equitable practices, and what it means to have equity from a gender perspective, from a race perspective, even from an age perspective.

How many of us have said to ourselves, "Oh, you know, so and so is too young to be a leader at our non-profit."?

Why is that?

What if that individual has really strong, natural leadership skills? Are you missing out on the opportunity to elevate someone to a leadership role because of their age?

Right, we were thinking a lot about race right now, but what about age? What about gender? Do we see men as more capable leaders than women?

Many organizations will tell you no, but when you look at their leadership composition, compared to the rest of the staff, you may find that there are many more men at the leadership level than at the staff level. Why is that?

Have we internalized in our organizations that men are more effective leaders than women?

The only way to get at those questions is to spend some time in discovery, asking both the what, the who, and the why.

So, what limiting beliefs or organizational biases exist within your organization that might prevent certain groups from advancing in their careers?

Why are we engaging in the systems that we do that help us either identify or not identify problems and potential?

These are just some of the questions that we encourage you to ask yourself as an organization when you embark on a workforce planning journey, if you are particularly interested in doing so in a way that is bounded and based in equity. We'll get this deck to you, so you don't have to

memorize these questions. You don't even have to write them down. You'll get this deck after today's session and can refer back to them. Also, intentionally put these questions in front of your colleagues and your peers at the leadership level because this is really where this work begins.

So, when we talk about workforce planning and equity, ultimately, I know that many of are saying, "OK, so, this is all great, the theory is wonderful, but how do I achieve equity in my workforce planning activity?" Glad you asked, let's unpack it.

First, let's establish what we mean by equity. I've used the term equity several times during today's presentation.

You may be using the term diversity in your organization. Diversity, equity, and inclusion, all mean very different things, but I really want to focus on equity today.

Because what equity means is that your organization recognizes that there may be some disparities within your workforce, or within your talent management system, that don't provide the kind of relevant support that is needed for overcoming barriers within the organization.

In order to have an equitable organization, you'll want to be focused on creating supports for those who are in your organization to thrive.

Can I thrive as a black woman in your non-profit?

Can I thrive as a gay man in your non-profit?

What gaps might exist?

What disparities, in either pupil practices or systems, might impact my ability to have an equitable place in the organization and contribute like everyone else, right? That's what we mean when we talk about workplace equity.

Do I have what I need as an individual, regardless of how I identify? Do I have what I need to thrive?

So, we also want to look at workplace culture when we think about equity because ultimately culture and behavior are what support whether or not we're an equitable organization.

Equitable workplace cultures demonstrate behaviors that value and respect individual groups with different backgrounds. So regardless of my background, my gender, my age, my race, my political affiliation which, nowadays, is quite fraught. I still have the opportunity to thrive and to be successful. As an organization, we recognize that there might be some specific challenges and circumstances that people from different backgrounds may need to have closed in order for them to be able to contribute in a really comprehensive and holistic way.

So, if your organization is committed to being an equitable workplace and if you're committing to engage in workforce planning in an equitable way, you have to first recognize that there may be disparities or challenges that are experienced by different people in your organization as a result of their background and their experiences in and through life.

Without that recognition, you can't really put an equity lens on your workforce planning practices.

I want to just spend a little time talking about some of the benefits of workplace equity and workforce planning, as it relates to equity.

We've talked about this a little bit already, but ultimately your organization will benefit by having a higher level of achievement when you are focused on who you have to do the work. If you have the wrong composition of people working for you, working in your organization, your organizational goals and objectives will be impacted.

If you need someone with really strong grant writing experience, but you only have a grant writing assistant, someone who lacks in-depth skills and experience, your ability to land and win you grants will be impacted, right?

So, when we focus on workforce planning in an equitable way, our achievement as an organization and at the individual level is elevated.

We also are more likely to retain the staff that we have.

What do I mean by this?

What I mean is that by having the right composition of talent, we are not putting unnecessary pressure on individuals within our organization to make up for the gaps in talent that exist within our organization. We're not asking one person to do the job of three.

That's kind of the old school way of doing things. That was a common practice that many non-profit organizations would engage in, as a way of saving money and demonstrating to the public that there were prudent and fiscally responsible. However, I would implore you that that is not a solid or even effective workforce planning strategy. It's just not, because what will happen is the people that live within your organization will burn out. They will leave, they will talk about you, and that will undermine the very goals and objectives that you set as an organization. So, retention is important and a key benefit of workforce equity and workplace equity.

Your ability to attract talent is also impacted by how effectively you plan for your workforce.

Being able to hone in, very specifically, in a laser-focused way who you need really is a strategy in maximizing your talent dollars.

By focusing specifically on your skill gaps, which you identify through that supply and demand analysis to understand what you need now and in the future, you can then go forward and specifically look for that talent in a way that does not waste time or money, or result in frustration.

When it comes to brand value, what are we talking about here? We're talking about employer brand value.

Your ability to effectively manage your hiring practices, your workplace culture or leadership development opportunities, all have an impact on your employer brand and on your ability to be seen in the public, as an employer of choice. I know that's a goal for many of you listening on today's call. Thus, it's important to nurture that brand value. The way to do that, to care for it and to feed it, is to have solid attraction, retention, and cultural practices that don't undermine who you are as an organization. As well as how people perceive of you, more importantly, as an organization.

People talk and you can look right now and see the number of major brands that have been subjected to scrutiny because they have failed to demonstrate equitable practices internally. Even though they have made bold statements about diversity, equity, and inclusion over the last several weeks.

Many, many employers have been called out. Everyone from Google to Microsoft has been called out because of their failure to align what they say with what they do. You do not want to be that non-profit.

You do not want to be the non-profit that is championing social justice externally, but not practicing it internally, right? So, this is important in your workforce planning efforts because they will be impacted by your ability to attract and retain staff. Then finally, the results that you achieve as an organization will be impacted as well. If you do not have the right people in the right seats at the right time doing the right thing, your results will be adversely impacted. I've been in this space for 25 years, and I have consistently seen the correlation between poor workforce planning, ineffective culture, and organizational goals and objectives not being met. Those things need to be in alignment. So, I just wanted to be sure to highlight that as part of our conversation today.

In the depths between planning and equity, workforce planning and workforce equity, are people, power, systems, practices, and importantly, organizational readiness. So, what do I mean by that?

What I mean is who holds power within your organization?

How power is distributed, understood, and demonstrated in your organization will absolutely influence your workforce planning activity. It's important to spend some time as part of that

discovery process, understanding the power dynamics within your organization because they absolutely influence the decisions that you make about who sits in what seat and when. They will also influence the extent to which you demonstrate equity.

The people within your organization. We talked about this already. Do you have people within your organization who have not come to terms with their biases and their decision-making processes? Do they understand how those decisions influence equity within your organization?

That requires both discovery and training, not just one or the other, but both.

So, examining the people who are making decisions about who sits where and ensuring that they have the tools that they need to make equitable decisions is really, really important.

Again, we talked about the systems. What things do you have baked into your hiring, retention, promotional, or leadership development practices that either advance equity or undermine it?

The only way to get to that is to examine those systems, and to really look at them through an equity lens. Now, this is not easy work. Please do not misunderstand. I'm not trying to simplify or dumb this down. This is heavy, difficult work, and it's often painful because it requires re-examining things that you perhaps have taken for granted or that you've never questioned before. You may need to help with somebody from the outside to objectively assess and analyze the extent to which your practices, your people, and your distribution of power are equitable.

Don't be afraid to ask for help. There are resources out there. We certainly provide support to organizations to help them understand where they stand from an equity perspective. But this work is not for the faint of heart though, I don't want to oversimplify the weight and difficulty of this work.

Finally, and most importantly, examine your organization's readiness to do this work.

Nothing would be worse than engaging in a workforce planning exercise with the goal of being equitable if you know your organization is not right. That will create resentment, frustration, and undermine whatever efforts you might be trying to engage in when it comes to being a diverse, equitable, and inclusive organization. So, check your readiness. Be honest with yourself about where you are. This workforce planning work through an equity lens may be more than you might be ready for. Be honest, and just take your time. We did not get here overnight as a country and we will not fix this overnight. But consistent, intentional effort around workforce planning and creating an equitable workforce is really the order of the day.

We're almost done, and then we'll take questions. When it comes to systems, I just want to call out those systems that you'll want to look at: your forecasting exercises and how you assess talent; the talent that you have and what you might need in a teacher; succession planning and how you go about succession planning and identifying key players; who you put into your leadership development programs and what kind of leadership development training you are

making available; your recruitment retention, redeployment, and retirement decisions. Those are all representative of systems. Your talent systems that may need to be revisited or examined, at least, to determine the extent to which they are inequitable or equitable. So, these are systems. These are systems that you'll want to look at.

When it comes to practices, here we're referring to things like performance management. We know that performance management, for example, often drives who's eligible for promotion and who's eligible for leadership opportunities in succession. So, if you have inequity built within your performance management system, that would perpetuate inequity when it comes to the systems work that we just identified.

So, it's important to look at your performance management practices to gauge whether or not there is inequity built within the performance management structure within your organization. The same applies to career pathing. How do you put people on various career paths if you even have them? If your organization is five people, clearly you won't have career paths for people to go on. Take from this what might be appropriate for you.

What practices are you currently engaging in to backfill positions when a position gets vacated suddenly?

How do you identify who's ready or whether or not you go outside or inside?

How are you matching competencies against current and defined needs?

How are you placing people within roles when they become available?

How are you measuring all of this to gauge whether or not certain groups are benefitting more than others? Are women benefitting more than men? Are men benefitting more than women? Is your black staff benefitting more than your white staff? Or your Latino staff more than your Asian staff? Or your straight staff and Christian staff versus those who identify otherwise?

These are all things that you'll want to look at and examine as you consider building equity into your workforce planning practices.

One of the things that I don't want you to miss in this notion of equity. Many of you are familiar with Equity Theory. Equity Theory is something that was developed by a researcher many, many years ago. His name is escaping me right now, I apologize, but the definition of Equity Theory is that an employee wants to get out of an organization as much as they put in. So, it's important to understand what your staff perceptions are and what their feelings and experiences are regarding workplace equity, as it relates to opportunities and planning.

Are they getting out at the same level that they're putting in?

Do they have access to opportunities in a way that they feel is commensurate with the effort that they put out for your organization?

That's something, again, that you'll have to unpack as part of your equity planning and workforce planning exercise, but it's something that I wanted to get on your radar and to think about. If you have no clue how staff perceive or how they feel about workforce planning in your organization and the opportunities that are made available to them, it's a question worth asking.

Finally, I wanted to just share some actionable steps that you can take to develop equitable workforce planning practices in your organization.

I alluded to this earlier, but it's really important to make sure your walk and your talk are in alignment. Don't talk about workplace equity without addressing why you're doing it, and what it looks like for you, for your non-profit, for your organization. Be sure, and be clear that you have addressed and defined your what and your why before going out and making public statements or even statements to your own staff. Spend some time exploring what equity looks like, what it means for your organization, and why it's important to you and to your mission.

Explore and seek to understand your organization's history, not America. That's important, and you can get the information about the nation's history around bias and discrimination, but what is your organization's history with bias and discrimination? Do you have a drawer full of EEOC claims that have been rendered against your organization? You know, that's important to understand and know because your staff will have a sense for that as well. They will have experienced bias and discrimination.

If you don't face your own history as an organization around equitable workforce planning practices and other talent management practices, it's going to be very difficult to engage in an equitable workforce planning strategy. You have to understand your own bias as an organization and the discrimination that you may have engaged in, albeit unintentionally, as part of this work. Use data to drive your decision-making process to uncover inequities. Look at that workforce composition data again, it will tell you something about what you have done to date and maybe what you need to do in the future.

Look at your data, your turnover data, your promotional data, your hiring data, your rejection data, and look for recurring themes as a way of understanding where there may be some inequity in your workforce planning practices.

Commit to redesigning your workforce planning strategy with equity at the center. Again, we're talking about what equity means, which is to eliminate those disparities that would otherwise prevent someone from thriving in the workplace. Commit to putting that equity lens on whatever you do as it relates to workforce planning.

It's important to also seek buy-in from the full demographic representation of your leadership and your workforce. What do I mean by that? Understand the perspectives, the experiences, the

feelings, the perceptions of the full diversity of your workforce. That may mean having conversations with: staff of color; staff who identify as under 30; staff who are over 60; staff who've been there for a long time; management; women; men; don't be afraid to ask questions of people, by their demographic groups and the groups with which they identify because what that will do is give you some in-depth insights into how people are experiencing your organization, which will then inform your workforce planning practices.

Finally, prioritize internal equity when it comes to workforce planning. When you identify that there's something broken, or that there's a major disparity, prioritize fixing that not only in workforce planning, but in all of your talent management practices.

Then finally, to lead by example.

What I mean by that is if you want to be an equitable organization, you must demonstrate equitable leadership.

You must convey to your staff that regardless of who they are, where they live, where they were born, who they were born as, they will have the opportunity to thrive fully and freely within your organization.

With that, I'll close. We've got lots of time for questions. I hope this has been helpful. Workforce planning is not something we talk about all the time, as talent professionals and HR professionals, and so I hope this refresher has been helpful. I'll turn it back to Atokatha to take any questions that might have come in.

Atokatha Ashmond Brew: Thank you Lisa, for all the information you shared this afternoon.

If there are any other questions, please type them into the questions box and our team will get to as many as possible in the remaining time.

Lisa, we do have plenty of questions. So, I'll get started. Some of these, you may have already answered, but I'll ask them and then we can move through them swiftly.

Here's number one. At what stage in a person's employment do you ask that demographic information, upon hiring or afterward?

Lisa Brown Alexander: You can certainly do it after you've brought someone on board. I don't recommend doing it before, unless you have any EOC compliance requirement in your organization. That typically might be built into a contract or a government requirement based on your funding. You don't need to ask it pre-employment or as a part of the hiring process, you can certainly ask it after. This is what I recommend. After your employment decisions have been made, get that information once they're on board or even when you have a large number of people join your organization. After that, if you've added a program, getting that information from those individuals, on at least an annual basis, is helpful. People don't change their identity

often, so I don't want to suggest that you have to keep asking for it, but as new people come into the organization, perhaps as part of your onboarding, you provide them with a questionnaire that they can complete to self-identify in order to help build your data.

Atokatha Ashmond Brew: Next question. What type of rewards other than compensation would you suggest?

Lisa Brown Alexander: I'm not sure I understand that question in the context of workforce planning.

However, I would suggest looking at all of your talent management systems, including total rewards and how you pay people and reward people. I would suggest looking at those through an equity lens. We're going to actually explore all components of talent management as part of this theory, through an equity lens. So, more to come on that. I hope that's helpful. I don't think I quite got the question.

Atokatha Ashmond Brew: Yes, if that was your question, please feel free to fill that question out again and we'll get back to it.

Here's the next one, Lisa. Organizations really want to do workforce planning strategically. Who in the organization is the right team to work on these projects? Is this project-based or ongoing?

Lisa Brown Alexander: Workforce planning can be done on a periodic basis. Certainly if you're realizing a change in mission focus, bringing on new programs, then you'll need to revisit your workforce plan. But the idea is that the work is done in conjunction with, or immediately following, your strategic planning process, and it can really be owned by any number of people. Typically, it's owned by the HR folks, but it can also be owned by your leadership team, if they have the experience and they know how to do that, or you can bring in a consultant to help you. However, most often workforce planning is owned and managed by the HR or talent management team.

Atokatha Ashmond Brew: Next question. Are you able to shed some light on skills-related barriers, in addition to demographic-related barriers?

Lisa Brown Alexander: Well, an example of a skill-related barrier would be requiring a skill set or making a skill set a priority in your decision-making process. For example, when it comes to hiring or promotion, if you require a master's degree from someone who perhaps could do the job without it. Or if you are creating unnecessary years of experience, such as saying that someone needs 15 years of experience when, in fact, if they had seven or eight, they are able to be successful in a particular role. That's where skills can be used artificially to keep certain people out of roles. Many times, organizations will do that either out of pressure because they want to convey that they've hired the very best and brightest so they may require that applicants come from a certain school, or that they have a PHD, or that they've worked in a particular role for 15 or 20 years when that may not actually be necessary for success.

So, I would look at your position descriptions if you have some. Really examine the skills requirements that you have for each role to determine whether or not they are in actuality what you need or if they are instead just what you want or what some one person may want in the organization, but really not necessary. Those can serve as barriers when we require more than is necessary, which has a tendency to put certain segments of our workforce out of reach for opportunities.

Atokatha Ashmond Brew: Next question. So how did you get organization leaders to turn this around when there is misalignment? In theory, we know, but it's challenging to get CEOs to take it seriously. For example, people leave and they share their experiences and the CEO ignores them.

Lisa Brown Alexander: Yeah, that's a tough one.

You know, CEOs respond to money. If I were in their seat, I would put this crisis, this challenge, in the context of money. Quantify how much it is costing your organization to make poor hiring decisions. Quantify the costs of poor promotional decisions or leadership development investment. Then, put that in front of your CEO as a way to make the business case for why workforce planning is necessary for your organization.

No one ignores money, not in this day and time and certainly not in the non-profit sector. Sometimes, I think we try to appeal to emotion or we try to make an appeal based on the right thing to do. That sometimes may not be enough. Money is rarely ignored. Partner with your CFO. If you don't have access to the financial data, partner with your CFO or your Director of Finance to help them help you quantify the cost of high turnover or poor hiring decisions, and then put that number in front of your leader. Talent, I guarantee you, is the largest expense you have on your budget and therefore, simply can't be ignored.

Atokatha Ashmond Brew: Next question. How do organizations diversify their workforce in a homogenous environment?

For instance, I previously worked for a non-profit that primarily white women with military connections. Employees outside of those groups were not engaged in workforce development.

Lisa Brown Alexander: Yep, yep. The fact that you recognize that is a good first step. If you are in a homogenous community, from a racial perspective, there are other dimensions of diversity that you can engage. Race may not be it. If you're in a predominantly white community, and that's who you have available in your workforce, then looking for a large contingent or diverse contingent of people from a racial perspective may not be your option. However, looking for folks who live outside of the military community might be how diversity is realized in your organization.

Or perhaps it is finding older people, or younger people, or those who come from different backgrounds other than the military, may be how diversity is realized. See, you want to think about diversity a little bit differently. If racial diversity is not possible because of where you are physically located, then try to leverage other dimensions of diversity, and then gauge your organization's readiness to be inclusive because it's one thing to be diverse but it's an entirely different thing to be inclusive.

So, if people do come in from outside of the military, how will they be received? How will their ideas be embraced? That's something you'll want to examine because if you bring in skilled people from outside of the military, but the people who have a military background hold all the power in your organization, there may be a struggle.

Plus, those non-military people might find themselves cycling out prematurely which will ultimately cost you money and will undermine your diversity efforts. So, that would be my suggestion. Look at diversity broadly. It may not be racial diversity, but there are many other components and dimensions of diversity that you might be able to take advantage of.

Atokatha Ashmond Brew: Next question. What does it mean for an organization to be ready? Does waiting for everyone to be ready stall the start of this very important work?

Lisa Brown Alexander: Now, that's an excellent question. What I mean when I ask if your organization ready is really look at your leadership.

Ultimately, leaders of organizations are the ones who set the tone. If you've got resistance in your organization to really take a deep dive into the diversity, equity, and inclusion, you need to know that. The way to know that is to engage in conversation and if you're not able to do that yourself, to find someone who can help you.

No, everyone on the team doesn't have to be ready but you do need a critical mass, but you need buy-ins. You need to be sure that you have the support of those in your organization who are determined to be key so that the work that you engage in around this does not get undermined.

So, you don't have to have a 100% agreement, but you do need to have a critical mass from those who have the power and influence your organization to call it and make a decision. Without them, it's going to be very, very difficult work and this work is already challenging enough.

So yeah, 100% is definitely not required, but you definitely want a critical mass.

Atokatha Ashmond Brew: Here's the next one. How do you manage expectations when exploring future opportunities with employees about interests and career growth in the organization?

Lisa Brown Alexander: Yeah, really good question. The smaller your organization, the more challenging this becomes. What we recommend to organizations is to not talk so much about

upward mobility because if you have five people, there's not a whole lot of room to go up, right? Your Executive Director or leadership person may be there for a long time. Instead focus on career enrichment and how someone can deepen and grow their skill set in a way that complements your business needs and their interests or desires.

You may reach a point, in that person's time with you where you may have to part ways because you don't have an opportunity for them and being honest about that is half the battle. So, look at your organization, look at those opportunities and where they exist. If you look and do that workforce planning and realize that you may not have any opportunities in the short term, meaning inside of a couple of years, put that out there. Be transparent about that so people can self-select out of the organization if they are, in fact, looking for career growth.

Nothing is worse than people believing that there are growth opportunities when in fact they really don't exist. That will cause resentment, disengagement, and ultimately premature termination or resignation.

Atokatha Ashmond Brew: Next question. We have voluntary social justice workshops and attendance is so low. How do we get majority staff engaged on such workforce planning?

Lisa Brown Alexander: My suggestion would be that you take a step back and examine your organization's readiness.

There may be fear, anxiety, doubt, pessimism, all kinds of things might be floating in the atmosphere at your organization for why people are not engaging in these conversations. Talking about race, in particular, is very difficult for many people. So, if people do not feel safe to have those conversations or if they don't trust the systems and the people within the organization, they're not going to make themselves vulnerable and won't show up to your voluntary kinds of events.

So, it's important to take a step back and do that discovery. What I mean by that is really engaging in potentially smaller group conversations to understand where people are as a way of building your DEI strategy and your equity strategy. You may have conversations by demographic groups because people tend to feel comfortable with people who are like them. Whether it's by age, by title, by program, by race, by gender. Consider doing that as a way of understanding what's going on. Also, if you know the trust level in your organization is low, I would recommend bringing in someone from the outside who may be seen as more objective than the people on the inside of the organization. That can often be a major contributing factor.

Atokatha Ashmond Brew: Next question. If after analysis, you recognize you are missing a specific demographic in your workforce. How do you actively seek to hire more of that demographic and consequently other qualified candidates?

Lisa Brown Alexander: Mhm, that's tricky. It's a slippery slope, right? There is a way to attract more diverse talent to your talent pool without discriminating against others. Let's be more

specific. If you lack people of color on your staff, being intentional in your outreach and you're networking for talent from communities of color is not discrimination against those who are white.

If you're making your decisions based on the strongest skill set and experience, as well as your support and alignment for that, you have a whole slew of candidates who meet your business criteria or the job criteria. If you make a decision to hire someone, based on that skill set, then you should stand firm on that: you hired this person because they brought the best skill set to the table. Now, if they happen to fill a gap that you have identified, then be clear about that, but ultimately, you're going to have to make a decision about someone. So, be sure that whatever decision you make is built based on skill, ability, and what they bring to the table. However, be intentional about your outreach because it's that pool of candidates that gives you many more options to choose from versus not having any at all. I hope that answered that question.

Atokatha Ashmond Brew: Next question. Our organization is fairly diverse, but our leadership team or people is not racially diverse. Would you suggest that we add members to the leadership team as we don't anticipate turnover in the leadership team this year?

Lisa Brown Alexander: It's a good question. You could do that.

You would need to really unpack that and explore that with the current leadership team. If having a more diverse leadership team is important, can you reach down to that next level of leaders and managers within your organization to include them in the leadership team? That's very possible as an option. The question is: what's the readiness for that, to share power, to shared decision-making, to be equitable? This is because what you don't want to do is invite that more diverse next level down when you're really not ready to embrace them.

So, you'll need to examine your own readiness as the leadership team to share decision-making and power sharing with that group, as a way of realizing a better, stronger, more diverse leadership team. It's certainly worth pursuing.

I know we're almost out of time. We'll take a couple more and then we'll wrap it up. We want to be mindful of everyone's time.

Atokatha Ashmond Brew: Yes. Here's the next question. We are interested in creating a series of trainings, Speakers, and talks about diversity and management practices. Where would you advise we begin?

Lisa Brown Alexander: Wow, there's so many resources out there right now.

I would really focus on what you want to achieve. So, before you jump into programs and activity, answer your question about what you want to achieve and why. Then, shape your activity around that.

What does it mean for your organization to be diverse, equitable, and inclusive?

Quantify that in real terms and then shape your training programs and your activities around the what and the why. A lot of us are ready to jump into training and what happens is we'll do a training or we'll do a luncheon and we'll do a speaker series and then we'll consider our work complete, and it really isn't. It's that kind of move to activity without thinking through the what and the why that, ultimately, I'm fearful, will undermine larger efforts at being a more diverse and inclusive workforce. This is because we'll see them as events as opposed to a strategy woven through our programs, our operations, our activity. That's how we get to the what and the why, right? Or it is through an examination of our programs, our culture, our people, our systems, that we arrive at the why and then, following that, we can move into activity.

It's a slower walk, I know. It doesn't get to doing something right away but it really, in my opinion, has a much longer-lasting effect if we're clear about why we're doing something and we're checking the alignment with who we think we are as an organization.

Atokatha Ashmond Brew: Thanks Lisa. It looks like we've just got two more questions. How do you engage with an organization when the CEO is unclear about his or her philosophy related to DEI?

Lisa Brown Alexander: Well, you can take a bottom-up approach. If the leader is not clear on his or her approach, then perhaps you galvanize the staff and take a bottom-up approach where a contingent of the staff help to shape the strategy and the approach, and then serve as advisors to the CEO, who may not be sure about where to go. I guarantee that you probably have people within your staff who have strong opinions and may even have some experience in the space, so leverage that.

It doesn't always have to come from the top. It will really depend on your culture and the readiness of the leader to take advice and counsel from somebody who may not be his peer or her peer but consider that as an option. It is a kind of a ground level, grassroots, bottom-up approach, rather than waiting for your CEO to be fully ready. He or she may be open to that. Check that first, so that you don't undermine the effort of the team that might come together, but that would be my suggestion. If the leader is not sure, let the guidance and advice and thoughts come from others, then see if they can work in a partnership.

Atokatha Ashmond Brew: Final question. Do you have resources or a list of questions that you can ask employees to gather information about their experiences or treatment organization?

Lisa Brown Alexander: I'd be happy to talk with you about that following today's session.

Please reach out to us, and we can spend some time with you talking through what that might look like for your organization. So yes, absolutely.

Wow. That was a rapid-fire set of questions. I hope that was helpful for everyone, we got in a lot.

Atokatha Ashmond Brew: Thank you so much, Lisa. That's all the time we have today for Q & A. Thank you to everyone who attended today's webinar. We hope you found it valuable. And, again, you can reach out to us if you have any questions, or if you would like support in this area, the key areas that Lisa talked about today, feel free to send us a message at info@nonprofithr.com. We will be hosting the next webinar in this series, on August 25th, focused on Talent Attraction and Diverse Recruitment Practices in Non-profits. Please be sure to complete the feedback survey that will pop up once the webcast is ended.

Again, if you'd like more information about available services or support from NonprofitHR, please e-mail info@nonprofithr.com or visit us on the web at nonprofithr.com. Any final words, Lisa, before we go?

Lisa Brown Alexander: No, just thank you so much. I hope this has been helpful and know that this is a journey and not a sprint. We're here for you if you need any support and we wish you well at your effort to be a more diverse, equitable, and inclusive organization. Thanks so much.



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