Nonprofit**HR**

WEBINAR TRANSCRIPT

DEIJ Mini Series #3: Transparency & Communicating Your Organization's DEIJ Strategy

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Your organization's people look to your leadership for guidance and direction. One area where you have an opportunity to communicate with transparency is decision making about topics that impact the employee experience, financials and strategic plan. A second area is how the external forces — such as the pandemic, war and ongoing calls for social justice — impact the need to revisit the organization's mission and asses the ability to meet it effectively. Because trust is a foundational element of an inclusive culture, it is essential for leaders to communicate the impacts of external events and how they affect the internal DEIJ strategy in order to sustain employee and organizational commitment.

From this discussion, you'll understand how to:

- Identify areas of opportunity where transparent communication is necessary.
- Communicate effectively with transparency to staff to advance DEIJ.
- Distinguish barriers that hinder DEIJ success.
- Employ different strategies for communicating DEIJ internally and externally.

PRESENTERS
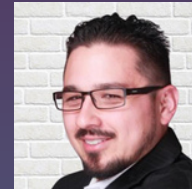
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Atokatha Ashmond Brew: Hello everyone and welcome to today's webinar. Thank you for joining us this afternoon for our third webinar of the 2022 DEIJ Mini Series. My name is Atokatha Ashmond Brew and I'm Managing Director of Marketing & Communication at Nonprofit HR. I will be your moderator for today. We have a lot of great content to cover. Before we jump in, I have a few housekeeping notes.

You've joined the presentation listening using your computer's speaker system by default. If you would prefer to join over the 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 presenters by typing your questions into the questions pane of the control panel. You may send in your questions at any time during the presentation, we will collect these and address them during the Q&A at the end of today's session. Today's webinar is being recorded, and you will receive a follow-up email within the next few days with a link to view the recording, and you will also receive the presentation slides.

And now, a little about Nonprofit HR.

We empower nonprofits to achieve their full potential through their people. Nonprofit HR is the country's leading and oldest firm focused exclusively on the talent management needs of the social sector, including nonprofits, associations, social enterprises and other mission-driven organizations. We focus our consulting efforts on the following practice areas: Strategy & Advisory, HR Outsourcing, Total Rewards, Diversity, Equity & Inclusion and Search. Nonprofit HR also offers customized learning and development, in addition to research and events, all with the objective of strengthening the people management capacity of the workforce. Since 2000, our staff of credentialed experts have advanced the impact of some of the world's most influential brands in the sector.

And now let's hear about today's presenters.

Dr. Antonio Cortes, Senior Consultant, Diversity, Equity & Inclusion at Nonprofit HR, has over a decade of experience as an applied Industrial/Organizational and Business Psychologist in the nonprofit sector. In his current role, he functions as a senior advisor on methodologies to assess, plan and improve approaches to incorporating DEI into organizational operations. Areas of practice include organizational equity analysis to uncover blind spots in operations which lead to inequities, strategy development to solve unique organizational issues of the EDIJ space, global application of DEI concepts for multinational organizations, and training on DEI topics, such as Building a Business Case for DEI, Implicit (Unconscious) Bias, Microaggressions and Systems Theory Application to Workforce Development.

And today, you will also hear from Steven Krzanowski, a Senior Consultant for DEI with Nonprofit HR. Throughout Steven's career in the higher education and nonprofit sectors, he has developed and executed diversity, equity and inclusion programs and strategies. In his current role, Steven works with industry leaders as a thought partner to uncover inequities in organizational systems, address gaps in knowledge and skills related to DEI for staff and constituents, and develop intentional, data-driven [and] actionable outcomes to advance DEI initiatives. He utilizes best practices rooted in theoretical frameworks, while ensuring concepts and content are applicable and easily understood at all levels of an organization.

Again, you'll have an opportunity to ask questions and contribute to the conversation during today's event. The recording and slides for this event will be sent within this week and live attendees will also receive SHRM recertification credits via email ...

And now, without further ado, I hand it over to you, Antonio and Steven.

Steven Krzanowski: Thank you so much, Atokatha. We are delighted to join all of you today for this session.

Antonio, would you like to say hello and then, we'll dive into the content?

Antonio Cortes: Hello and again, I just want to encourage questions as they come up. This is definitely a meaty topic, so to speak, so feel free to put those into the chat and we'll answer as many as we can throughout the session today.

Steven Krzanowski: Great. Well, let's go ahead and dive in ...

We are hoping today, in the next hour and a half, to ... accomplish with you ... On the screen are our learning objectives, and we're hoping that all participants will be able to identify areas of opportunity where transparent communication is necessary; communicate effectively with transparency with your employees to advance diversity, equity, inclusion and justice; distinguish barriers that hinder DEIJ success; employ different strategies for communicating DEIJ, both internally and externally.

After we review some concepts and frameworks with you that you can reflect upon and start to think about how you adapt at your own organizations, we're going to welcome Melissa Forburger who will share with us how Association Management Strategies Incorporated has focused on embedding transparency into their organizational culture. After that case study review, we're going to end with some participant questions and answers.

So, before we dive into the material further, let's pause and hear from you. Throughout today's session, we have three polls that we're going to be asking you to participate in. So on your computer or smartphone, please go to menti.com. That's M-E-N-T-I dot com, and we're going to ask you to enter the code 6549 9322, and they're ... putting that in the chat box for you. And feel free to leave this open in the background, because you'll have the ability to access it easily.

Our first question for you, once you start to answer this in real-time, is, what is the level of transparency at your organization? One [is] not transparent; [two] is somewhat transparent; and [three] is very transparent. If you're unable to access the Menti poll, enter your answer into the chat box.

And we'll give folks a few minutes to log in here, again, at the top of the screen, you can see it's menti.com, and you'll use the code 6549 9322.

We'll give folks some time to answer in real-time.

Atokatha, while we're waiting for folks to get their answers in here, let's take a question.

Atokatha Ashmond Brew: Yes, Steven, here's a question.

What are the best ways to communicate where we are with diversity, equity, inclusion and justice?

Steven Krzanowski: Yeah, so I think that one of the things that you need to do — it's twofold.

One, you need to look internally to define what this work means to you as an organization. And then, two, how is it incorporated into your constituents ... ? And [there will] be different messaging required to communicate that out for both groups here.

With staff, you're going to want to really look at what ... it looks like to belong at your organization. What does that look like? [Regarding] areas of inclusion, diversity [and] representation, what are some of the goals that you're hoping to achieve as an organization to live out your values? Is diversity, equity and inclusion part of those values? ... [Start] to communicate around that.

Antonio, what else would you add?

Antonio Cortes: Yeah, I'd like to focus a little bit more on the how, I think that's where some folks might get stuck.

This can happen in a multitude of ways, and actually, it should happen in a variety of ways. So, thinking about, do you have staff-wide meetings on a regular basis? And is there a portion of that meeting that's dedicated to updates on different things across your organization? Sometimes [it relates] directly to your diversity, equity, inclusion and justice efforts, or it could be more process related. It could be in the form of saying, "Hey, we conducted a compensation study and these are our findings," and sharing those out.

And so … when we have the total organization in place, communication of information is essential, but it also shows up in other places, such as email updates or updates the policies that exist in the employee handbook.

It could be external facing, as you're thinking about this, Steven had alluded to the constituents, your stakeholders, what information is useful or important to them as those considerations come into play? You can also think about your social media and how that's managed or not. So, I think communication is one of those things that's extremely complex, when you actually lay … out the different pieces that you could potentially consider. So that's a big topic, and we'll come back to that a couple of times throughout today's session and give you some more specific examples of how and at what frequency.

Atokatha Ashmond Brew: Right, thank you so much, Antonio. I think some people may have been seeing the wrong thing. It looks like it's been refreshed. So if you could refresh your browsers on Menti, then you should be seeing the right poll.

Steven Krzanowski: So, it looks like we have about 10% of folks that are saying that their organization is not transparent, 62%, somewhat transparent and about 31% very transparent. And this is what we're seeing when we work with organizations across the United States and globally. Most folks are entering around that middle section, right Antonio? And, for some folks that are just beginning … the practices, or are unaware of where to begin … I think [many] folks tend to be in this middle section.

Antonio Cortes: [I want to chime in here.] Something else, Steven, is that folks are defining transparency in their own ways a lot of the time. And so, something that we want to accomplish by the end of today's session is to have a … bit more grounding on … how do I quantify this? And how do we have some agreement on what we even mean when we say transparency in an organizational context?

Steven Krzanowski: Exactly. And let's go ahead and define transparency on this next slide. So, thank you all so much for participating in this first poll. You'll have two more polls to engage with us [coming up].

So let's define transparency, so we're all working from the same definition. [We define] transparency as, "An organization that operates by creating and maintaining a culture of openness internally at all levels of the organization and externally with constituents."

Transparency practices within organizations can strengthen the management and employee relationship. It can create a level of loyalty that inspires and motivates your team. It can create new levels of accountability for mission deliverables, and ultimately, it's impacting levels of employee engagement. It's a way to create buy-in and ensure all staff are on board with ways to fulfill your mission, your vision and your strategy.

A lot of times, folks, when they're thinking of transparency, they're going straight to financials and operations. Yes, that's one area of transparency that can have a positive impact on an organization. And the reason for that is because the more staff know about the [organization's] financial health, the more they can make the best decisions for that company and themselves.

We'll discuss additional areas that require levels of transparency. But transparency can really be boiled down to: How are you effectively communicating with one another across your organization?

In many instances, we have an ethical obligation to be transparent with each other and our stakeholders. Communication between staff, between teams and different roles, leadership and staff, our constituents, et cetera. The more honest we can be as leaders, the more engaged our teams will become and the more we will [develop] trust.

Strong levels of trust between management and staff will help sustain any challenges, frustrations or negative news that organizational leaders often tend to have to deliver from time to time. When there's confidence in your honesty as a leader, it's the foundation for long-term organizational success.

Ultimately, we're striving towards having increased levels of employee engagement, that staff engagement is so critical, and that's a direct correlation between transparency and employee accountability.

So, when we think about transparency, one of the key ingredients is developing a culture of trust. So, at the core of transparent organizations is a culture of trust. Trust is one of the most important ingredients ... to effective transparency, and that's trust with peers and supervisors, trust with organizational leadership. The Ohio State University Fisher College of Business published an article [focusing on building a trust culture]. The article is a great example of how organizations can work towards establishing a culture of trust.

One such model is Michelle and Dennis Reina's, and their model of trust outlines three critical components: capability trust, character trust and communication trust.

Capability trust is a trust in competence, it grows when there is confidence in the perceived degree of knowledge, skills and [abilities] of an individual.

Character trust is the expectation that individuals will do what they say they will do and to be depended on.

Communication trust is the willingness to share information, tell the truth, admit mistakes when they're being made and maintain confidentiality.

Considering all dimensions of trust is important, whether you are building it for the first time or working to re-earn trust after it's been broken, we have a few tips for you on [building] trust ... When establishing a new relationship, it's important that individuals strive to build trust with one another. These elements of Reina's model give us a place to start when building trust, so establishing capability, character and competence, and following these three tips to build trust in new relationships is a great way to start.

One, follow through with your commitments. Saying what you'll do, and then following up and doing that is critical to building trust. When commitments are upheld, we build greater trust in our abilities and our intentions. We come to expect what is said to be the truth and that others have our best interests in mind.

Communicate appropriately. In order to become trustworthy, it's necessary to communicate well. This includes both sharing information openly and maintaining confidentiality when necessary.

And the third one here is being respectful. Respect is about treating others with courtesy, listening to their ideas with an open mind, approaching conflict in a healthy way to appreciating them, appreciating each other and bringing all of who you are into those relationships. Treating others with respect shows you truly care and are committed to each other's success.

Sometimes, their trust can be broken in organizations, right? ... We may make a mistake, or a betrayal may happen within our organizations and the relationship can be harmed. Employees tend to feel disengaged and the company culture can be damaged when this happens, right? For these reasons, it's important to consider ways in which to rebuild trust after trust has been broken. And similarly, we have three steps that you can take.

 ... [The] first step in rebuilding trust is to acknowledge what happened. Rather than ignoring a betrayal, talking candidly about what happened can help both parties to move on. Making amends or apologizing signals to the other party ... can show that you've taken responsibility and are able to move forward.

Number two, take the small steps. As you work towards rebuilding trust, you have to take action. These are the same actions you take when building trust initially, following through with commitments, communicating appropriately and being respectful. But after trust has been eroded, you need to look to whatever opportunities exist to take action, no matter how small they may seem. It all will make a difference. And be patient, it can take time to mend relationships. One of the most important things that you can do is be patient and let it grow over time.

So, as we explore trust, it is important to [understand] the levels of trust within your organizations. [For] many of the clients that we serve, we do equity assessments, and we gauge levels of trust within an organization. And those are key indicators of where there may be some issues that are happening within your organizational culture, and those are things to pay extra close attention to.

And you can find different ways to assess trust within your organization. Again, the more trust you have within your organization, the easier it will be to apply some of the transparency practices that Antonio is going to discuss in just a moment here.

But before we dive into that, one last thing about building trust, so much of it is relationship building, right? And whenever I have questions, I always find that I can go to Brené Brown. I feel like she just has all the answers, right? And she has developed a model called BRAVING. And these are seven interpersonal practices that, when practiced can build trust and it can build a one-on-one with folks that you're working with, within teams or within an organization.

To summarize her acronym, she explains the first one is boundaries (B). You need to respect my boundaries. And when you're not clear about what's OK and not OK, you ask, and you're willing to say no.

Reliability (R). You do what you say you'll do. At work, this means staying [with] your competencies and limitations, so you don't over-promise and are able to deliver on commitments [while balancing] competing priorities.

Accountability (A). You own your ... mistakes. You apologize when things happen, and you make amends when necessary.

The vault (V). You don't share information or experiences that are not yours to share. I need to know that my confidences are kept and that you are not sharing with me any information about other people that should be kept confidential.

Integrity (I). You choose courage over comfort. You choose what is right over what is fun, fast and easy. You choose to practice your values rather than simply professing them.

Non-judgement (N). This is when I can ask you for what I need, and you can ask me for what you need. We can talk about how we feel without judgment here.

... Generosity (G). You extend the most generous interpretation possible to the intentions, words and actions of others.

I love this, and I saw [it] a while back, and I have really been intentional [about] ... building relationships with my colleagues and friends ... I've utilized this as a framework in working with others, and I've found great success with it. And I hope you will, too.

So, as we think more about trust as a foundation for transparency, we want to pause here and ... go to one more question. And the next question is, what should organizations be transparent about?

And we can see some ... here.

And I think it may have accidentally ... pulled from the other ... technology. [I'm going to refresh this here.]

... What I'd love for you all to do is drop in the chat box, what should organizations be transparent about?

And Atokatha, [could you] read some of those off for us as they come in? But we'll give folks a little bit of time ... to get their answers in here. And, Antonio, would you like to take a question while folks [answer]?

Antonio Cortes: Sure, we can take a question. But it also looks like they are starting to come in now. I think there's some residuals from the first item where people may have been responding to the text box.

But, you can just refresh one more time.

So, I was noting some things, such as decision-making processes, pay, hiring, benefits, everything, which is ideal.

I also saw earlier, before refreshing, there were some DEI practices mentioned, DEI stats specifically, so some great examples of what organizations can be transparent about. But Atokatha, if there's another question that we can take right now, we're happy to do so at this time while folks are adding ... their responses.

Atokatha Ashmond Brew: Sure, there is a question regarding tracking and reporting on pay equity and if you have any insights on that?

Antonio Cortes: ... That is probably the most contentious topic within organizations — pay and pay transparency ... One of the first things I will say is that if your organization does ... regular compensation audits or equity assessments, there's no reason to hold that information [privately]. That's information that you can share out and report back to your broader staff. Basically say, "Hey, we had a third party conduct this assessment for us, and we learned that either we're in good shape and that there's no action needed," or "that we identified a couple of things that need attention. Some individuals' ... salaries are not where they should be or [there are] some things that aren't in alignment with job bands," or something else.

[Be] honest and open about that information because, at the end of the day, those types of assessments are conducted with the intent to either determine if we're in good shape or, if they are places where we can do better, that we actually take action on those.

When it comes to other aspects of compensation, such as posting jobs [and] sharing salary bands for individual roles — those are other places where you can consider transparency in process and information. Again, they exist in most organizations. Most roles have some type of range that is documented somewhere. No reason to hold that in confidence as more and more organizations — and even states — are moving in this direction of pay transparency overall. And so, in addition to that, [there are] related processes to compensation that you could consider, such as advancement. What are protocols related to promotions and how [do they] impact pay, et cetera? There are so many places to consider when it comes to pay transparency.

Steven, [is there] anything you'd add [to] that topic?

Steven Krzanowski: ...That sounds great, Antonio, and we have some additional answers in here. I'm just going to read a few off.

So, decision-making processes, strategy decisions, hiring [and] compensation policies. There was promotion, anti-discrimination policies, how folks are being hired, pay scales and a decision-making framework.

So, these are ... great ideas here, and I would agree with all of you. And we'll dive into [some additional areas] ... on the next slide. Antonio, would you like to talk a little bit about where transparency is needed?

Antonio Cortes: Sure thing.

And so, as we ... saw on the last slide, with your own responses and contributions, [we can] consider lots of places ... So, what we want ... to do here is compile a list of specific instances or places where transparency can be helpful, or help us identify any trends or themes that might be happening within our organization.

... One of the first places that you could consider is access to general information, such as policies, procedures, how to access resources. A lot of the time, I think about employee handbooks. And if your organization has a handbook, it probably has a ton of different things in there. [For] example, you may have a policy on professional development resources and how a staff member might go about accessing those.

The more information ... we have on how things work in an organization, and the [clearer] they are, when an employee ... needs that information, they should know ... where to ... find it. And then identify, [for example] ... the process if I want to take time off. Or [what] if I want to work on obtaining a promotion or ... professional development? All of those things often come with policies and procedures. And again, the more transparent we can be about that — the more available we can make those to our team members — the better experience they ... will have in navigating those systems.

You can also consider your recruitment goals and [the] processes that you employ for recruitment. In thinking about [this,] are you tracking and sharing [the demographic composition of your recruitment pools] with your hiring managers? Are we looking at our hiring pools and how those demographics shift from the beginning of the process to the end?

And looking at, again, different breakdowns based [on] gender, race, ethnicity, potentially, and other protected classes, and making sure that you're doing a good job on the very front end, and that you're hiring processes throughout the system are also doing a good job of maintaining a robust group of individuals that can ultimately make it to that end process to be hired.

And we talked about compensation a little bit on the last slide, and that's a big, big topic. But [the] compensation band is one of those areas that [is] so simple. You can post a hiring range with a job description, and you will actually make your process a little bit more effective. [Candidates who] are well beyond that salary range will self-select out of the process, and you'll save both their ... and your time on the front end.

[Folks who] are looking for pay equity will be able to understand what ... this job effectively pays for someone who has roughly my level of experience and skills — what does this realistic salary look like for me, as an external candidate?

And then, internally, the same is ... true in thinking that people want to be paid fairly ... That's probably a foundational thing that most people can agree on, but compensation bands and making sure that my salary is actually in our posted bands is something that helps with confidence in your organizational processes and practices related to compensation. So, sharing this information ... is becoming more and more common, becoming standard at this point. But that's definitely something that we should be considering.

Also ... when something doesn't go right, or I have a situation that I need some support with, [consider] that I may not be comfortable going to my supervisor. Are there processes in your organization that employees can use to report incidents that they ... need support with, or [when] they have an interaction with a colleague that they need some mediation with? Is [the] process to obtain that type of support or action clear ... available and known by most of your staff?

The answer to that is hopefully yes. But if the answer is no, in your instance, what are some things that we can put in place to create a process or to just be more transparent of what the process actually is?

When it comes to decision making in organizations, this is another area where we can consider how information is shared and the volume of information shared that makes sense for folks [who] are going to be impacted by decisions.

So, I'm sure all of you have had an experience at some point in your career, where someone in a more senior role ... made a decision, and it impacted your job on a day-to-day basis. And you had no say or input in that decision. That's not a great feeling. If you've been there, and for those of us [who] are in decision-making roles, sometimes we make a decision and it has unintended impact or unintended consequences because we didn't necessarily do as thorough a job as we could have of investigating: What are the consequences or ... impacts to other stakeholders or ... colleagues?

And so, as much as possible ... and we'll come back to this one a little bit later ... decision-making practices [from our assessments] can be more transparent in most organizations from our assessments ... It doesn't take as much effort as you might think, in some cases. So, we'll give you some practical examples [of] what to do.

When it comes to updates and sharing progress on different initiatives within your organization, this is another area that ... is super easy and helpful for transparency and updates ... A number of my clients that I work with are doing great work. They are creating strong compensation practices ... strong performance management systems [and] thinking about how they can develop their talent, retain them and make them feel like they're contributing to a bigger mission or purpose. But they don't necessarily do a great job of communicating the progress of all the change and all the great things that they're doing internally, and sometimes it gets lost in translation.

And while we may have a great system — a great process or a thing that we're working on — if nobody knows about it, it's not necessarily helpful [in impacting] things like employee engagement, morale or trust within an organization ... Wven just the small act of communicating: "Hey, we're working on performance management and improving it," [helps] and every quarter having some updates on new things that have changed or become available to your team members — ... are some ... things to consider.

Anytime you do a survey of staff experiences within an organization, it is best practice to consider how this information will be shared back to stakeholders. [Whenever] you completed a survey, I'm sure you've wondered, in some cases, what happened to that information and how did it get used?

One of the first ways ... we often collaborate with our clients is to ... [take] stock of this information to think about what we're going to action — [this] is definitely important. But even the simple act of saying, "We heard what you stated," and being able to share that back with our constituents is an important step in that process.

[Organizational finances is] another [topic] that often ... is ... contentious; in some cases. [It's] another area where we can be more transparent. Do your team members understand how well their department [is] doing in relation to other departments? Do they understand how the organization as a whole is faring from a financial standpoint?

Interestingly, I would have assumed in the past, as a novice at some point ... way back many years ago, that [organizational finances] wouldn't be a big deal for nonprofits because we have to publish our [Form] 990s. We ... make financial information available publicly, including the highest paid salaries in the organization. But I think this longstanding practice of financial and monetary information being held private sticks with us, even ... today.

So the more ... our staff can understand the [organization's] operating environment, the more they can ... draw connections to, "Well, what does my salary raise going—or my salary or merit increase going to be this year, if we're doing really well financially?" What are the expectations there? Same is true in the opposite direction. If we're not faring well financially, might I anticipate a lower merit increase this year or might I anticipate organization cost-savings strategies to be put in place, and vice versa? And what can I do individually, as an individual contributor, to help improve our financial well-being?

Once we start to draw the connections between all these things, people start to understand that their individual contributions ... have an impact on the bottom line, even if it's an indirect or small one. Over time, teams and larger groups ... have a major impact as we all know.

Also, [consider] looking at places like retention and turnover reports ... Understanding [the] demographics [for the folks that come into our organization] is important, but what about the folks that leave? And why are they leaving? So, both having an understanding of, are there certain trends with demographic shifts within an organization with us being able to retain or not retain certain populations, is definitely a consideration, and something we'd like to investigate and report back.

And then [consider] ... themes of, what are the reasons people leave our organization? Is it because ... there's [a] lack of growth opportunities? Is it because they don't feel supported by the manager in terms of professional development access? Is it because of pay?

Whatever the reasons are, we need to be able to know what [they] are and action them ... There aren't necessarily reasons for us to, again, hide or put that information into a little box and hide it away. When [hiring managers] ... get certain types of feedback, it's helpful for them to be able to understand: What ... [can we] do differently to improve retention potentially on our teams?

... DEI value statements are also great ... to use internally and externally, to let your internal stakeholders and team members [to] understand how your organization will approach advancing diversity, equity and inclusion within the context of how you operate. But also [convey DEI value statements] externally ... Think about how your stakeholders are impacted by your efforts to be a more inclusive and equitable organization, [and] with how you consider service delivery [and] support you provide to them. So, a DEI statement is often a grounding factor both internally and externally for a lot of work that transpires.

When you think about messaging, this is ... an internal and external consideration. But [also consider] what are the things that are highlighted by your organization, and by your leadership team — in emails ... social media posts ... public statements [and] on your website?

All of those places where information is shared about your organization or about the things that you're engaging in ... are instances where you can control the narrative of, "This is what we're doing and why." And ... [provide] additional information that might be useful ... to those various stakeholder groups.

[There are other places that we can continue to go,] but I think this is a good comprehensive list ... [The last here] is supplier diversity ... Many organizations ... have supplier diversity initiatives that they are embarking on. And the more information you can share — internally and externally — about that [the better, by asking]: What criteria [are you] looking at? What are some of [your] considerations and goals ... around supplier diversity? And then, how do you actively [improve and ensure] that you have a diverse pipeline of suppliers you partner with? These are all instances where, again, more information is better, and it also signals to other organizations that, "Hey, maybe I should consider offering my services to your organization, now that you have this particular program that's targeting an organization like mine," potentially.

Steven, any additions to this list that you would make?

Steven Krzanowski: ...This is pretty comprehensive, and it aligns with [much] of what we [saw] in the poll from participants.

I always say, anywhere ... you can be transparent, be transparent. And there's a lot of upside to it. And transitioning into the next slide here, we have [another] poll. This will be our last poll for today ... For those of you who may have joined a little late, we're using menti.com. So please go to menti.com and use the code 6549 9322.

And our question for you all is, what barriers exist that prohibit our organizations from practicing transparency?

And, again, if you're unable to access the Menti poll here, feel free to enter some of your thoughts in the chat box. We'll give folks a few minutes to answer.

Antonio Cortes: Steven, while we're waiting for that, can you double-check to see which one is populated on the site currently, to make sure it's the correct one?

Steven Krzanowski: It's showing me this one, the barriers, is that — I hope that's what others are seeing.

Antonio Cortes: We'll find out shortly if we get some responses coming in.

All right, and while we sort through that, Atokatha, if there's another question, we're happy to field that now.

Atokatha Ashmond Brew: Yes, there is Antonio.

When an organization owns its faults, how quickly should [it] remedy the error after acknowledging it?

Antonio Cortes: That is a good question. My consultant hat, my first response is, always, it depends. Because [of the incident,] the context of your organization's ability to effectively respond in a timely manner is a consideration. [Another question is if] ... responsiveness or a change [is] needed.

So, my default response is that [there are many] things to consider. But in general, I would say as a rule of thumb, once it is acknowledged, as soon as it's feasible and reasonable for an organization to ... [respond] to something that was raised as an issue, is ideally when it should be actioned off.

So, a practical example: If we do a compensation study and we find that ... a group of employees ... [is] under market salaries where they should be. We may or may not be able to practically take action on that as an organization based [on] our financial state.

And so, acknowledging ... "Hey, we've done this process, we identified some things that need some attention," and then [presenting] a timeline of when we'll ... be in a position to rectify that and share the rationale. So when we talk about transparency, the transparency of the full situation and ... the transparency of ... the plan for action, even if it has a stretched-out timeline.

What I've found, in my experience, is that the more information that employees — and people in general — have about what's going on and the reason why a solution is taken and why the timeline is what it is, the more receptive they tend to be to that action, even if it's not as soon as [they'd] like it to be. But, again, at the end of the day, you may also find that once you start working on your rationale and explaining that, you probably could take action sooner on some things, rather than later. So, sometimes you have to grapple with that reality as well.

... Steven ... I'd love your thoughts on this one too, this is a really good question.

Steven Krzanowski: Yeah [we have] some great points here. One of the things that I think is important is, even if you don't have the answers at that moment and you need to reflect on the next steps ... saying, "Our leadership is pausing, we're meeting internally with our stakeholders to make sure that we're coming up with a response or a strategy that meets the needs of our stakeholders," or whatever the issue may be, right? But communicating that, and showing that, we're all human, right? Sometimes when mistakes are made, [own] them. But then, like Antonio [said,] provide what that timeline will look like and stick to it.

And that is one thing that you can do ... to not only be transparent, but to maintain trust, is to really focus in on the timeline and how you—what is your response going to be, and that cadence.

Antonio Cortes: And here on the screen, we have some great examples of barriers that basically get in the way of organizations being able to effectively practice transparency.

So, time is a big one. Bureaucracy, right? Recognize that in some organizations, it takes a long time for things to get through, approved and shared back. Past practices, this is the way we've always done things. [How about] institutional cultures of silence ... ? This is just the situation and the environment ... we operate in, and it is what it is ... Hierarchy, lack of trust, power dynamics, privacy issues, leadership, specifically, individuals, potentially, apathy, lack of time or resources or capacity to manage communications, clear expectations. So those are [many] things.

And on the next slide, we've also identified some explicit areas where ... things get in the way of ... being as transparent as we [would] like about certain things. [For] example, being insensitive to "in" and "out" groups within an organization.

And then, as you think about organizations becoming more diverse, which ... is ... a natural thing over time, right? ... Generational shifts will happen.

And with that, a lot of additional demographic diversity is going to show up in organizations as we go. And what does that mean for our culture and how we are inclusive to new groups that may not have been part of our organization before? And sometimes that lack of intentionality or thoughtfulness when it comes to bringing new folks into the organization, it's lost in the process. And so, if we form these "in" and "out" groups, we may have instances where certain people don't feel as welcome or as included as others.

There's also just the general idea of what inclusion looks like as an organization in terms of internal actions.

... Diversity is pretty easy to accomplish. In my experience, if you set up strong processes to have diverse recruitment pools, you can ultimately, over time, get to [hire] a multitude of diverse candidates or candidate groups, and ... having them in your organization ... So, that's diversity, it's just the presence of people that have different backgrounds and experiences.

But including people [with] different backgrounds, experiences and ways of thinking is not always as easy, right? In some cases, myself being an industrial organizational psychologist, I see things in a particular way. If I'm in a group of medical physicians or doctors, sometimes we have a different opinion on a couple of things because of our perspectives, approaches and fields; it happens. And ... the same is true across professions.

And so, that aspect of, how do we make sure that [we have] an inclusive environment? That could potentially be a moving target over time, as more and more people join your organization. So, being intentional about being on top of that as much as possible is important.

Microaggressions is another area of consideration. Microaggressions are those commonplace, daily verbal or behavioral slights that are typically unintentional but come across in our communication or ... behaviors with each other. The most common one that I'm the perpetrator of is responding to large groups of people as, "You guys." I've done this a few instances over the years where I've said "you guys" to a group of women. And recognizing that it's a very small thing. It's very unconscious. It's not intentional. I don't say things to necessarily hurt or harm people. But those experiences sometimes stick with people over time, and especially if they are on the receiving end of those, those over time become things that get in the way of us being comfortable, raising issues around transparency or being comfortable being transparent.

Another one is, this is a great one to translate to recover from mistakes, what happens when things don't go right? What do we do about that, and how do we take action?

So, thinking about the fact that owning it is the beginning of the process but taking action is definitely the sustaining piece for us to build beyond that. As Steven [discussed] earlier, it's an important thing that we need to ... continuously work on. And so, even though we make mistakes, it's not the end of the situation. We can take action to rebuild.

Fear of repercussions and retaliation is definitely another consideration.

Internal and external environments are also things that have to be navigated as part of building transparency. So, when you think about internal, you will be considering things like staff expectations of what's realistic. You may also think about your staff survey experiences. And, again, being transparent about those. You may be thinking about organizational systems, specifically your people systems ... retention, hiring practices, all the things we've discussed. That's all part of the internal environment.

Additionally, with the external environment, when you think about all those other aspects that we had highlighted on the last slide in thinking about your external stakeholder groups and what information is shared or not shared and how ... you solicit feedback from them, those are definitely points of consideration.

Then, the last item that we'll highlight here is around bias. And recognizing that ... this was one that that you all raised — was, I'll frame it a little bit differently, we've always done this this way. And we have a bias towards doing things the way they've always been done. That sometimes gets in the way of being transparent, because in the past, we didn't talk about these things or ... have this information available.

Again, thinking about organizational financial health or compensation practices and policies, just because it was in a particular way or handled in a particular way in the past, does not necessarily mean we can't change it. So having that bias sometimes gets in our way of seeing a different way of doing things.

And on the next slide here, I want to acknowledge, too, just briefly, that there is risk involved with this.

I don't want to lie to you and say that this is all just roses and unicorns like my youngest daughter loves. Sometimes you have to get that reward of having a more informed, more engaged workforce. We have to risk a little bit of something.

And sometimes that means we have to navigate criticisms when things aren't going well or we may have to recognize that sometimes we get defensive about those criticisms, rather than taking that as feedback that we can use to become more effective or better with transparency. [It's about] taking accountability and making sure that we are actioning things that we can and ... think we [will] provide a good ROI on time and investment. And then, making sure that individuals [are responsible] for those things to ensure they are getting done.

You may also have to navigate social media ... The more transparent you become about information in your organization, sometimes, again, when information is learned that is not the most favorable ... it can land on social media via, let's say ... LinkedIn or Glassdoor reviews of your organization. Interestingly, [we find] that the more transparent organizations are and the more willing they are to take action when needs are raised, that shows up on social media ... So, everything from transparency and equity in compensation to how managers support their teams to how leadership shows up. Those are places where you may also encounter that information coming in from current or former employees.

Something that we ... can risk here is getting stuck. And the concept of trying to get everything perfect or right when we do it the first time is something that, occasionally, will get in the way of us actually being able to make some progress. And so, as you think about how your organization might become more transparent, either in communication or processes, try not to get stuck in that place of, "It has to be perfect. It has to be done exactly ... right the first time." Very few things, when it comes to human beings, is perfect or done right the first time. So just keep that in mind.

And the last thing that ... gets in the way or that we are risking is the unknown or their fear of "what if." And that's a tough place to be. But knowing that, if you have your intentions in the right place, and you're doing your due diligence of obtaining feedback from, again, stakeholders who are impacted by decisions, those positive intentions and thoughtfulness of process will often lead you to a better place, as long as you're continuously absorbing that feedback and trying to incorporate that into your approach.

Then, when it comes to leadership ... this is where it starts. And I won't go through all these bullet points because I ... want to get to our case study here. But leadership is often where transparency can originate ... if that makes sense. And so, it comes from the top.

And so, if our senior leaders in an organization are saying and committing that they're going to come up and begin to have more transparency in decision-making processes, as appropriate, to incorporate different stakeholder groups, as they consider making significant organizational decisions, as they begin to communicate more effectively across the organization, as they think about their role in modeling transparency, all of those things are important to ensure that the organizational culture becomes more receptive and in alignment with being as transparent as possible.

And then, the last bullet point is actually what I want to hit home on — the consistency of how leadership shows up is important to, going back to Steven's point around, trust and just showing up in an authentic manner. So definitely, leadership is an important consideration here.

Steven, what do you think here? I think, I want to cover this one, but do you think we should shift to the case study after this one?

Steven Krzanowski: Yeah ... that sounds great.

Antonio Cortes: OK, perfect. So this last piece here is when you think about how to improve transparency, there's a number of things that you can action. And, these are just five considerations here, that, as we say transparency, I want you to operationalize it ... a little bit and say, "Well, what does this mean? When I leave this conversation and go back to my job, what ... will I do differently to ensure that I am trying to be as transparent as possible within my span of control?"

One of the first things you can focus on is the method, volume, and frequency that you communicate through. So, in order to be transparent, it's essential to communicate effectively. And communication starts with individuals and can gradually build up a more transparent culture. So, as an example, if I'm on my team and I'm sharing information on, "Hey, I'm struggling with this particular client engagement, and this is what I did to solve it." Sharing that information ... at a parallel level with my team members [will] help them understand, "Well this works or this doesn't. And I don't necessarily have to rethink the wheel on this one."

The same is true across the organization. So, the more communication ... you can have about different things that are happening that are impacting different teams in the organization, having open lines of communication through multiple mediums is ideal to ensure that transparency is embedded in that.

Sharing information. I talked earlier in this conversation around policies and practices and how documenting information is important. But ensuring that [information] is also accessible to your broader staff base is the second piece of that.

The third item I want to highlight is sharing the rationale. Oftentimes, this is a piece that's missed in decision making. And so, sometimes we have the outcomes of decisions and sometimes we have the starting point of where we were before the decision was made, but we don't have the in-between of what we considered: the financial position of our organization ... considered the external environment ... the impact to staff and sharing all those things collectively and how they impacted your decision making. Sometimes it's necessary to share the rationale for why things are done, especially when they're significant organizational decisions. But the rationale is also a key piece.

The fourth is to consider how to shift your organizational culture. We talked in a few instances about the roles that individuals such as leaders play, the need to be consistent with your approach, and over time, again, the more that you support and show up and say, "We're transparent as an organization in these ways," and show up consistently over and over again, your people managers will start to model that behavior ... Then, your team members and all that will also begin to model that behavior and then [you'll] expect it as an organization. And so, it becomes embedded into our organizational culture and, over time, will shift how we approach it.

... Then, the last piece is feedback loops and ensuring that we have an ongoing volume of feedback from our teams that are ... flowing up through the organization, and then [integrating that information] into decision making. And then, going back down in the other direction to ensure that even though ... you can't take all the feedback ... you receive, you have to make some decisions along the way. But, understand ... that there is a process of how those decisions are made and what information to incorporate versus not. The process is just as important as the information and decisions themselves. So, feedback is vital to getting that done.

So, Steven, I'll turn it to you, and I'd like to get to the case study here and hear a little bit from Melissa.

Antonio Cortes: That sounds great, Antonio. And just so everyone knows, we have two slides that we're not going to cover, but [they] will be in the expanded deck. So when you download a copy of ... today's session, they will be included and it's on accountability, power-sharing and decision making.

So let's dive in here and introduce Melissa Forburger. She is the Senior Vice President at Association Management Strategies Incorporated (AMS), [providing] leadership and human resources expertise to AMS and its clients since 2015. Melissa's career has been dedicated to the nonprofit industry working for association management companies and at a standalone association. She's been intimately involved in both organization and client growth, financial oversight, people management, grants management and operations management. Melissa has worked closely with 15 boards of directors, countless committees, and works and partners with volunteer leaders to advance their [organization's mission]. Melissa has served as a mentor to over 25 young professionals during her career and maintains close relationships with many of them today.

As a graduate of Virginia Tech with a Bachelor of Arts in Communications, Melissa holds the Certified Association Executive (CAE) credential from the American Society of Association Executives, and is a Certified Professional (SHRM-CP) through the Society for Human Resource Management (SHRM).

So, Antonio, and everyone, I'd like to welcome Melissa. And Antonio, do you want to get us started with our first question for Melissa?

Antonio Cortes: Yeah, and just for additional context, too, we've worked with AMS and Melissa's team for a while now in different capacities and ... have found them to be a great example of how an organization approaches diversity, equity and inclusion work throughout a variety of considerations, whether it be HR or people experience. So, ... we would love to hear a little bit from Melissa today about [that journey].

So, Melissa, first question. As an organizational leader, what prompted your diversity, equity and inclusion journey? ... Can you give us ... a description on how it's evolved over time?

Melissa Forburger: ... Thanks, Steven and Antonio. I appreciate being here today. So, AMS [is] an association management company. We manage small trade associations. In late 2019, we did a five-year action plan where we looked at the next stages of what we wanted to do. And one of the things ... we budgeted for and included was a DEI plan starting in 2020 ... We decided to invest in it and ... work [on] doing it. We went through [the] process of going to an RFP. We selected Nonprofit HR as our partner, and then started to do that process in mid-to-late 2020. That included surveying our staff, working with a team and [developing] a DEI committee.

... We're almost two years into it and [it] ended up being ... even more than we thought it was going to be. We ... knew the things we thought we would go into as ... anyone does with that, but it's really evolved over time ... The other thing is ... we're ... hoping to propel it to something that we can help our association partners with too, in the work that we do with the different boards and committees ...

Antonio Cortes: So, I want to go down one path here ... I know you have a DEI committee in place. Can you talk about [the] evolution of how you identified the need for a committee? What were some of the things that you considered prior to launching that group?

Melissa Forburger: Great, thanks ... We did a survey that Nonprofit HR [conducted for] our team, and we were really glad to see that 96% of our staff replied to the survey, [giving] us their touchpoints of where they were feeling on their DEI journey. Through that, we were able to say, "OK, here are the stages we want to do." And we knew one thing that we wanted to do was to create a DEI committee, and we intentionally wanted that to be done [by] the members of our team.

We have 35 employees and our leadership on our team is not very diverse. We intentionally didn't want the leadership to [run] the committee. So, Nonprofit HR worked with us. We developed a committee [of about 10 individuals]. We made sure we had representatives from different teams, [with] different areas of expertise within the company, different levels of experience and different representations along the DEI lines.

They worked together and developed their own charter of what they wanted and what AMS wanted. They would present to the staff and leadership about what that looked like. They helped us develop a DEI mission statement, and then they ... really went gangbusters and ... took it to the next level. They developed DEI chats and educational series and really ramped up what they were doing.

The biggest thing that we wanted it to be ... was something that comes from our staff and ... team and not from leadership. While they were coming to leadership, and saying, "Here's what we're doing," it was more just for our leadership to say, "OK, that sounds good," or "Do you need financial resources for that?" ...

And the other thing is, we wanted to make sure that it was a safe space where people could feel comfortable talking about DEI issues. Obviously, in 2020, there was a lot of social injustice happening in the world because of the pandemic, we were all kind of propelled into doing more things like we are today over the screen. And we were engaging more and trying to develop the relationships to continue to have these conversations.

Steven Krzanowski: Melissa, as a follow-up question, while you were talking, you mentioned that you all have a DEI statement. How did you [create] that statement and how do you use it?

Melissa Forburger: The committee developed the statement, they worked together, wanting to touch on the different ways of DE&I. They developed it ... presented it to leadership and the staff, incorporated it, including some infographics and included it on our website. They took it a step further and included DEI and ... our approach in the client work that we're doing, too — how we look at things. [We try] to incorporate those themes throughout our client work.

And then, again, just really working with the staff and the team on incorporating those into what we're doing — blogs, [we published] a blog ... about the release of that. Anytime the DEI committee does any work, they present to the full staff: ... "Here's what we've done, here's what we're working on," and get feedback along the way ... from the team to see if there's [anything missing].

Antonio Cortes: Thanks, Melissa, it's always great to hear the amazing work that [the] committee has done in such a short period of time.

OK, so today's workshop session is explicitly about transparency. [From your own vantage point,] can you talk ... about the importance of transparency [in] decision making ... and how ... your approach to creating more transparency [has] changed as part of your DEI journey?

Melissa Forburger: Yeah, I think that's something — we've done a survey through our company, through an HR system that we have that's surveyed for a while, and I think communications and transparencies, one that we've heard from there. We took that to the next level with DEI of, "OK, we're hearing this, we're hearing this feedback. How are we incorporating that? And how are we making sure that we're letting employees tell us and provide feedback?"

And one of the things that we heard from our feedback was, what's going on with salaries? How do I know that my salary is what it is, and it's comparable to others in the area that I'm being paid fairly and equitably? We actually engaged, and did, a salary survey review of all of our salaries this year. And we're able to put that together and present [it] to the team, [saying]: ... "We've gone out to compensation, we've looked and we've said, 'This is where you are, based on your position, and where you are there,'" to be transparent about that, so that the team is aware.

And, also, a part of that is, we incorporated a new performance management system that we had through our online database, our online HR system. And that was something where we wanted to ... provide an equitable process because we know [managers can sometimes] be subjective in how they're doing things. And so, we spent a lot of time really talking ... with the team about ... how we're going to be doing this so it's transparent, so that one manager isn't doing something different than the way that another manager is doing it.

Everyone had to be accountable [for] the same steps and processes that they were doing. And then, we just finished a round of surveys [for] our team. [We] just finished our evaluations in April and said to the team, "Can you let us know what you thoughts [are] about the process?" We asked managers, from their perspective, what they thought of it, and asked employees too.

And one of the things that we've learned in this whole process is [that] transparency is [a] constant. I don't think you can ever be transparent enough. [There are] things we still have to continue to share with our employees to get their feedback and chat with them about. That's just one thing that we found, we've got to continue to be transparent in the process.

Steven Krzanowski: I love that and you talked ... about this, but could you share a little bit around what feedback looks like at different levels at AMS?

Melissa Forburger: Yeah. So, feedback can be anything from a survey, talking with your manager, talking with HR ... Pre-pandemic — we used to have just a monthly staff meeting and as we realized everyone was kind of disengaged, we started having a weekly staff meeting. And then as life was coming back to normal, we thought, "Oh, maybe we don't need to do this anymore." We actually surveyed the team, "What do you think?" And they said, "No, let's have the meeting, even if it's only for five minutes, let's touch base."

And ... one of the biggest ways that we looked for their feedback [on] ... being involved in transparency is that ... in the spring of 2021, when people were saying, "How [do] we go back?" We surveyed the team to say, "Well, what do you want to do?" We really left it up to our team.

[We asked], "You've been functioning remotely for a year, what do you think?" And we really let them drive that message for us. We did it pretty early. In the past, if you were somebody [who] worked remotely, it was somebody in a more senior level. It wasn't somebody who had just come to the organization. And after we [had] been successful in that process, we said, "Well, let's get that feedback from them."

And we did that through a committee that [we] put together, similar to our DEI committee, [with] representation all throughout the company, where people [can] provide their input and say, "This is what I would like to see," or "This is what I don't like" ... committee has evolved and is continuing to get feedback from employees, as we've been doing this for a year, [addressing what] we need to do. What information aren't you getting now that we're working remotely? The things you used to get standing at the water cooler, how can we continue to share that information while remote?

Antonio Cortes: Thanks, Melissa, and I appreciate you reaffirming my feedback loops on one of those earlier slides that I shared and showing that in practice. I'm curious, Atokatha, do we have any questions for Melissa from the audience?

Atokatha Ashmond Brew: We do. Here's one.

Who leads the DEI committee? Did a staff member volunteer to lead or did the group self-select? And do they rotate leadership?

Melissa Forburger: ... At the time, [we] did a call for several committees ... that employees signed up for. They had the option of selecting if they were interested in being chair and the situation it was two co-chairs. They were two junior members of the team, they co-chaired it. I sat on the team [representing] HR ... in case they needed feedback from something. We're just finishing a cycle now, where all of our committees are re-upping and that's one where we have folks that are volunteering in that place, as well.

Antonio Cortes: Awesome. Any additional [questions] Atokatha, specifically for Melissa?

Atokatha Ashmond Brew: Yes, there's another one.

How has leadership in the organization changed ... their engagement with the staff DEI committee? I'm curious to know more about how leadership is engaged and if it's framed as a staff-centered DEI committee.

Melissa Forburger: If it's framed as a staff-centered DEI committee? ...

Atokatha Ashmond Brew: Yes, that was the question.

Melissa Forburger: We've had times where the DEI committee has presented to leadership. One of the things that we wanted to incorporate for 2022 was to do some manager training.

That's some feedback we've gotten from ... different surveys: Not all managers manage the same ... [Within the] survey ... questions we asked ... one of the things that we instituted was a microaggression training for managers, which was great. We did the session and it was very well received ... The DEI committee got the feedback from it. And they've actually now come back and said, "We want to have the whole office have that training, not just the managers from that."

 ... The leadership team ... [thinks] of it as a staff-run committee. Partially, not wanting to feel like the management has control over that committee. [Rather] they're helping us guide the organization. Now, if they came and said, "Well, we want to do this initiative," and it costs more than we can possibly imagine, we may need to budget for that or work through that there.

But we've really tried to put that in the area of employees handling that. And I think that's one of the ways that we've pivoted in this transparency. Before, it was probably pretty old school, where leaders were the ones always running the committees because they were the first to volunteer and maybe weren't given that opportunity before. And now, with our new cycle of committees that are coming up, actually, no one from leadership is managing any of those committees. Those are being run by different members of the team.

Antonio Cortes: It's always just exciting and interesting to hear about your team's experience. I, personally, I'm definitely biased. I think the AMS staff is just an amazing group of people. And so, I'm not surprised at just the amazing progress that they've made over a period of time.

Melissa, I have one last question for you before we open it back up for questions from the audience ... I talked about risk earlier, and I'm curious now, what do you think is the business case for transparency? And what are some of the tradeoffs that you should probably — we should probably — consider here?

Melissa Forburger: Well ... with risk, there's transparency. But sometimes, if you're transparent ... there are some worries [about] being too transparent. Are we showing too much information?

You know what? That's been a challenge ... that [we] overcame in the beginning. I'm sure there was a little bit of pushback of, "Well, gosh, we've never shared this information before," and I think the answer was like, "Well, why not?" So, I think that's a little bit of [a] challenge.

... The risk for some of our staff members was that we let them be vulnerable and talk about [uncomfortable issues] and things we, as a company, had not discussed before. I think one of the great things [that your team did], Antonio ... is you talked to us about this theory [of] "ouch and oops." If the group was talking about something ... we could apologize for it, as we were going through it.

And you referenced it in your slide here, we definitely still have situations where somebody will say something or post something, and they realize they may have hurt someone's feelings. And what I've seen that's been great is that they've stepped back ... and said, they reached out and said, "Hey Melissa, I'm really sorry. I said this, I didn't mean to offend you," taking that down or walking back through that. And I do think that's something where people are doing it immediately, and I feel like the staff has felt comfortable coming and saying, "I was offended by this," or "I don't like this," or "Do that." So, I think that's something that we've seen there.

... We learned that there were things we needed to change in some of our decision-making processes about hiring and promotional practices and compensation practices and staff recruitment. And we're continuing to do those.

 I don't want to say that there's not [risk]. There's risk, but I feel like the teams [have] ... said, "Well, there's no risks. We're ... going to try it all and we're going to do it all." But I think the risk is we continue to evolve and change as we build the process because we're constantly learning, as you add new staff members and new people come on and learn different things about their backgrounds and what is important to them, what's of value to them, and some of our clients. We have some clients that are ... very typically, all white, male organizations. So, we've had a challenge for sure. And that's the next level of what we want to do, is how we can help them incorporate that into their process there.

So, I'm not sure if [I] totally [answered] that question.

Antonio Cortes: No, you definitely hit it on the head ... and even thinking forward what does this look like as we continue to advance it externally? Because that's where the rubber meets the road, and that's where folks are like, "Hmm, I didn't know that you all were working on this particular area," and what does that mean for those organizations? So, I think that's exciting stuff, and [I'm] looking forward to hearing more about that as it evolves.

Atokatha, I'm not sure if [there are] additional questions for Melissa or ones that Steven and I can field, but we're happy to open it up at this time with the few minutes we have left.

Atokatha Ashmond Brew: Hi, yes, and lots of questions have come in ... Some may be sprinkled in here for Melissa, but I'll just shoot through as many of them as we can. Here's one.

How do you handle pay transparency when you have [many] outliers from [the] acquisition of employees who may have threatened to leave and their pay was increased way out of grade in order to keep them?

Antonio Cortes: ... Steven, [do] you want to take that one or [do] you prefer me?

Steven Krzanowski: Why don't you start Antonio, and then I'll provide some backup?

Antonio Cortes: This is a real thing, right? I want to first acknowledge that.

This is a thing that happens; it's sometimes a situation that you are ... put into. If you're a new HR director, and this is something that you've inherited in terms of loose processes over the years, [with many] exceptions being made, I would go back to what I said earlier about, what ... the timeline [is] for correcting something?

[It's about] being honest, transparent, and factual about what is possible within reason and ... thinking about the fact that you want to work closely with your compensation team and a compensation expert to help figure out ... the best way forward ... Recognizing practically, you have to navigate your financial situation as an organization, and [ask]: How much of can you absorb quickly? But at the end of the day, you definitely, ideally ... Want to partner with experts to help design a process and to then roll out and then communicate to staff, saying, "In the next 12 months, we hope to even out some of these inequities in compensation," and what does that look like? And, it might come in phases. It might come in different situations.

But I think at the end of the day, transparency is part of the process of getting to a place where things are equitable. And sometimes we just have to own the situation that we're in as an organization. And we don't necessarily all have the knowledge or experience of how to address those types of complex situations, which are definitely emotional, they can be frustrating for a lot of the individuals involved. But having an expert partner is ideal, if you can obtain one, to help you figure out, what's the most logical way to get this done? What does that timeline look like, [is it] a practical and doable for the organization?

Let's see.

Steven, anything you would add?

Steven Krzanowski: I just want to re-emphasize the equity piece, because I think that is so important in communicating. So, when you have bands that are in place and even if there are outliers, having an explanation around why those are outliers, that's transparency. And, unfortunately, there will always be folks [who] leave your organization for various reasons, right? But as long as you are centering equity in work and in your explanations ... that provides [much] clarity for folks.

Atokatha Ashmond Brew: OK, here's our next question.

How do you create a safe space by establishing ground rules that the group agrees on? Any particulars on how to create a safe space?

Steven Krzanowski: I don't think you can ever have a safe space. But ... we can have brave conversations with one another. And one of the things that I highly encourage folks to do, as they're starting to engage with one another around topics of diversity, equity, inclusion and justice, is to come up with a set of ground rules that are unique to them, right? These are shared principles that you can all adhere to, right?

And, when you can create that type of buy-in at that level ... you [can] really engage in more meaningful conversations with one another. But I think it really needs to [reflect] the group in setting the tone for what ... those guidelines will be? And then also, if someone makes a mistake, how are you calling them out or in the experience? And how are you utilizing it as a learning experience for folks?

Anything that others would add?

Antonio Cortes: I think you captured it, Steven. Internally, we call these brave spaces and we have also used that language [often] with our clients.

At the end of the day, sometimes we have to have some difficult conversations. Having a level, fair space for us to air out those grievances when they exist and having conversation and dialogue about it is the key to having a good starting point as a foundation. We may not solve everything today, but at least we can get clear on some of the things that [need] attention or ... some action.

And so, if we can at least start there, I've found that to be more productive than avoiding information. I found it to be true across organizational contexts too. So practically, I take that approach with my former roles I've had with partner organizations in saying, "We have these really complex issues that we're trying to figure out together.

Let me give you all the information I think is useful to you to make your decisions in the most effective way that will accommodate and intersect with this information." And so, transparency is key, even in those contexts as well.

Atokatha Ashmond Brew: Thanks. Here's another question.

We are a smaller nonprofit, and [we collect] demographics of our applicants, pools, race, gender, ethnicity, et cetera. Is this something you suggest doing or that larger organizations are already doing?

Antonio Cortes: Yeah, great question. I can kick us off and say that it's not necessarily a question about size.

Larger organizations tend to have more capacity to collect and use this data differently. But even small ... nonprofits have the ability, in most cases, either via their existing systems or through other processes they can implement fairly inexpensively or very simply. But, yes, this is definitely something that we're seeing: an increasing process ... of understanding the trends in our hiring process.

So specifically, think about the recruitment pool. As that pool goes through your hiring process, how does it shift? How does it change? Are we seeing that there is a potential unconscious bias [based on] who our recruiters are putting to the top of the list, so to speak? Are they gravitating towards people with similar names? Are they gravitating towards people with similar educational backgrounds? Et cetera, et cetera.

You can start to pinpoint places in your hiring or recruiting process where there's a potential breakdown or need for more investigation on what's going on here in this particular situation with regard to your recruitment ... and hiring pool.

So, it gives you a starting point of investigation to say, are we in a good place? Or is there some potential needed to implement more structure or processes in our hiring or recruitment practices to allow us to have a less biased process? And, Steven, I don't know if you'd want to weigh in here on this one too.

Steven Krzanowski: Yeah, in addition to not only recognizing bias, I think it's important — folks are always wanting, organizations are always wanting, to hire diverse talent. We're all being asked that question. And, if you are not collecting the data to show that you have diversity in your recruitment process, then you may not be able to end with diversity, right in the process.

So, I highly encourage folks to collect the data but use it solely [to ensure] that you have a strong representation in the pool of candidates. And, if there are opportunities where you see that it's inconsistent, add additional processes ... Have a benchmark where [you] want to have X number of diverse candidates at the onset before we even start reviewing applications, right? And that can help set the stage for a successful recruitment and hiring process.

Atokatha Ashmond Brew: Great. It looks like we have time for one, maybe two more quick questions. Here's one, I think it's for Melissa.

How is the DEI committee ... recruiting new staff or new participants?

Melissa Forburger: One of the things we've done with new employees that have started is we talked to them about the different committees that are there. And, we've had people that definitely join midcycle. One of the things our DEI committee did is we also have to use something called Vonage, which is similar to Slack or any of these chat channels.

We created, what we have, a DEI digest where we post DEI-related things such as pride month or maybe something that's happened in history, or if there are things, unfortunately, that are happening in the world, we've talked about that. And we've picked up a few members because they have gotten engaged in the conversation and they've reached out to one of our chairs and said, "Hey, I'm interested in being involved in that piece there." So, we keep it open and people can come.

We've also had one or two that have had to jump off just based on client workload, and they just don't feel they can keep up with that.

Atokatha Ashmond Brew: Thank you, Melissa. It looks like — I thought we would have more time for another question, but I do want to give us an opportunity for final thoughts from the panel before we wrap up. So, I'm going to turn it over to you three to let the audience know if there is anything, any points, that you'd like to leave behind for them to consider as they move forward with this work that you all have discussed today.

Steven Krzanowski: I can start. First, thank you all so much for participating in this conversation. It's super important. And one of the things that I highly encourage folks to do is explore accountability, and what does that look like? And if you [can] have a DEI committee or a board that holds your organization accountable to transparency, it's an easier way to continue to make sure that you're maintaining the culture that you're hoping to create ... that could also be developing a scorecard to make sure that you are accountable or embedding it into your strategic priorities and initiatives, but really looking at ways that you can consistently embed some of these principles that we've discussed today. And practice makes perfect, right?

Antonio Cortes: Melissa, I'll let you go first, if you'd like.

Melissa Forburger: I would just also say, if there's something you're trying to think about transparency, why aren't you sharing that information? I mean, what's the real reason? What's the harm? Why aren't why aren't you sharing that information? I think in the ways that some old-school nonprofits are set up, it just felt like you couldn't do that. And then, if you're concerned about budget-related items for getting involved in a DEI program or doing that, [there are] lots of ways that you can trim that and select that, that works within a budget of your organization and you can do that over the course of time, too, because there's a lot of things you can do pretty inexpensively. And it pays off for sure.

Antonio Cortes: I totally agree.

And, I would say that starting is the ideal thing to do. We covered [many] different areas and things to consider in today's session because we can't address everything, but we figured out where we can start. What are some pieces that we can begin with? Is it our performance management? Is it with compensation? Is it professional development? Is it just making sure people understand that we have policies and practices in the first place and that they're documented and where to go if they might need them at some point?

There [are] always ways that we can continue to evolve and grow with transparency, and getting started is the best thing to do if you haven't already. And then thinking, as you go and evolve and feel good about some of the changes you're making in your organization, what are some ways you can continue to advance that? Because there's always more to do, there's always different ways we can approach a situation. And just keeping that in mind, it's a process that takes time and can evolve over time too.

Atokatha Ashmond Brew: Thank you, Antonio. Thank you, Melissa. Thank you, Steven, for such a great conversation. That's all the time we have today for this program. And we hope you found it to be valuable. We have many more events coming up. Check us out at nonprofithr.com/events, and register. Please be sure to complete the feedback survey that will pop up once the webcast has ended.

If you'd like more information about available services or support from Nonprofit HR, please email us at info@nonprofit.com, or visit us online at nonprofithr.com. Again, thank you so much to our presenters today.

Have a great afternoon.