

[Organization Name]

Enhancing Board Inclusivity

Final Report

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Dr. David McCarty-Caplan

McCaplan Consulting Group



(773) 682-2060



davidmccartycaplan.com



Los Angeles, CA

| MCCAPLAN

Marketing Strategy, Research &
DEI Consulting

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Executive Summary

This Final Report presents an overview of key findings from the [organization] Board of Trustees Inclusivity and Engagement Project and outlines recommendations for action intended to further improve inclusivity and engagement within the [organization] Board of Trustees.

Data Collection & Stakeholder Engagement

Findings described below were derived from three forms of data collection: (1) a survey of [organization] Trustees; (2) in-depth interviews with select trustees and staff; and (3) focus groups with various collections of trustees and staff. Each of the 28 trustees completed the quantitative survey. Sixteen trustees/staff completed a 1-on-1 interview. And 5 focus groups were conducted with various trustees/staff. The purpose of these data collection processes was to gain insight into trustee and staff perspectives related to board inclusivity, engagement and functioning. This report begins with a summary of results gathered from the quantitative survey, and concludes with a summary of key themes that emerged through analysis of the qualitative data gathered during interviews and focus groups.

Following these methods of data collection, an Advisory Group composed of 10 trustees and staff was engaged in a collaborative process of reflection and discussion about the quantitative and qualitative findings. The Advisory Group met for two 2-hour sessions, where they were presented with project findings and participated in a facilitated collaborative brain-storming process intended to clarify important aspects of the project results, and elicit data-informed ideas about recommendations for action. This process of engaging key stakeholders knowledgeable of the board's history and activities was an integral part of developing the recommendations for action provided in this report.

Key Findings

Analysis of the quantitative survey identified a number of important factors related to trustee engagement and inclusion. These findings include:

- 100% (28) of trustees agreed-strongly agreed that the board reflects a sense of mutual care
- 81% (21) of trustees feel a strong sense of belonging within the board
- 57% (16) of trustees feel the board is accessible to all people
- 54% (15) of trustees feel some aspect of their identity limits their board engagement
- 42% (11) of trustees feel time spent on generative responsibilities is 'too little'

Content analysis of the interviews and focus groups revealed five primary themes within the qualitative data: (1) alignment of values and purpose; (2) reflections on privilege and power; (3) process and product tensions; (4) Jewish identity and board membership; and (5) Board and staff relationships. Exploration of these themes reveals there remain a number of important areas for growth within the board, particularly with regard to addressing racial microaggressions, redressing time-related board engagement limitations, building buy-in and support structures for ongoing equity and inclusion work, and improving relationships among trustees as well as between trustees and [organization] staff.

Recommendations for Action

This report concludes with description of four Key Recommendation Areas, intended to support [organization] Trustee inclusion and engagement: (1) training and education; (2) structural development; (3) inclusivity and relationships, and (4) ongoing evaluation. Within each of these areas, specific examples and/or suggestions for

action are provided. It is hoped that these recommendations will provide a substantive starting point for the ongoing equity and inclusion work of the [organization] Board of Trustees.

Conclusion

The [organization] Board of Trustees has made significant strides in improving diversity, inclusion and engagement within its membership in recent years. There is evidence of a unique and impressive culture among trustees of mutual care, openness to growth, and eagerness to contribute to the board's development in meaningful ways. And yet, there remain important limitations to the depth of the board's efforts related to inclusion and engagement that require ongoing consideration and action. It is hoped that with the existing strengths of the board, and reports such as this, that the [organization] Board of Trustees will continue to pursue greater equity, inclusion and engagement by exemplifying the consistency in commitment, humility, and proactivity that is necessary to create meaningful organizational change.

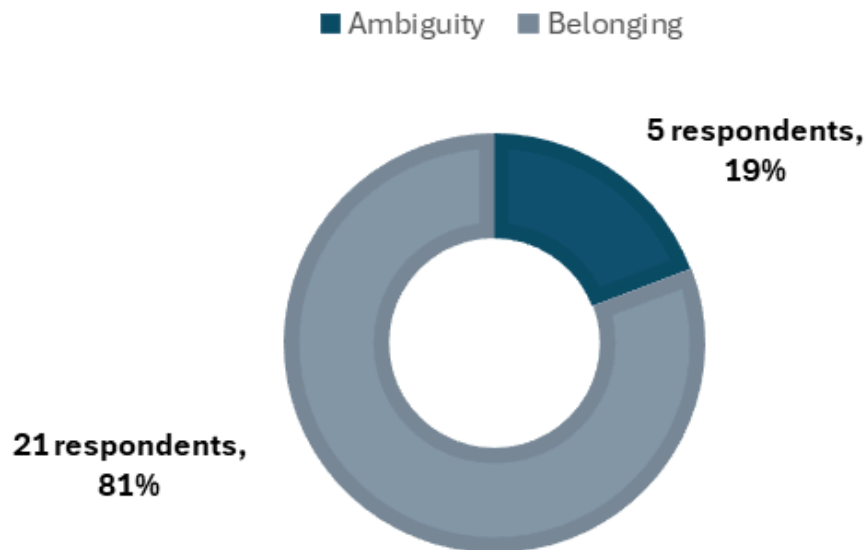
Sense of Belonging

For this report, the concept of 'sense of belonging' was measured using the 10-item [Belonging Barometer](#), a composite measure that determined a single score for 'belonging' for each respondent. This measure was tailored to the specific context of the [organization] Board of Trustees, and included items designed to measure factors in a given community context such as; emotional connection, feeling welcomed and included, relationship satisfaction, and authentic self-expression. Scores on this measure could range from 1-5, with scores in the lowest third (1-2.33) indicating a sense of 'exclusion,' scores in the middle third (2.34-3.66) indicating a sense of 'ambiguity,' and scores in the top third (3.67-5) indicating a sense of 'belonging.'



Data gathered from this measure among [organization] Trustees¹ indicated:

MOST TRUSTEES FEEL A STRONG SENSE OF BELONGING



No respondent scores fell into the 'exclusion' category

- The average score for belonging across respondents was 4.1, and scores ranged from 3.30 - 5.0, indicating a generally high sense of belonging

¹ This variable reflects the experiences of 26 participants, as 2 did not complete all 10 of the Barometer questions

Findings from the 10-items within the Belonging Barometer indicated:

- Trustees scored lowest, on average, on their sense of feeling like an ‘insider’ who understands how the board functions (*mean* = 3.7); and feeling like their relationships with other trustees are as fulfilling as they would like (*mean* = 3.9)
- Trustees scored highest, on average, on their sense of feeling they were not treated ‘less than’ other board members (*mean* = 4.5), and their sense of feeling welcomed and included (*mean* = 4.4)

Tenure & Time

The tenure of trustees was dispersed as follows:

Tenure	Frequency	Percent
1-3 years	13	46%
4-6 years	6	21%
7+ years	9	32%

This evaluation explored issues of time across a variety of domains as they relate to trustee responsibilities and experiences. Findings on these items reveal:

Time spent on committee responsibilities

- 17 respondents (63%) felt time spent in this domain was ‘just right’
- 7 respondents (26%) felt time spent in this domain was ‘too much’

Time spent on overall board responsibilities

- 18 respondents (67%) felt time spent in this domain was ‘just right’
- 5 respondents (19%) felt time spent in this domain was ‘too much’

Time spent on the primary responsibilities of the board (fiduciary, strategic, generative, learning, socializing)

- A majority of respondents felt time spent on these responsibilities, across domains, was ‘just right’
- 11 respondents (42%) felt time spent on generative responsibilities was ‘too little’
- 10 respondents (39%) felt time spent on learning was ‘too much’
- 9 respondents (35%) felt time spent on socializing was ‘too little’
- 9 respondents (35%) felt time spent on fiduciary responsibilities was ‘too little - way too little’
- 8 respondents (31%) felt time spent on strategic responsibilities was ‘too little - way too little’

Board Engagement & Inclusion

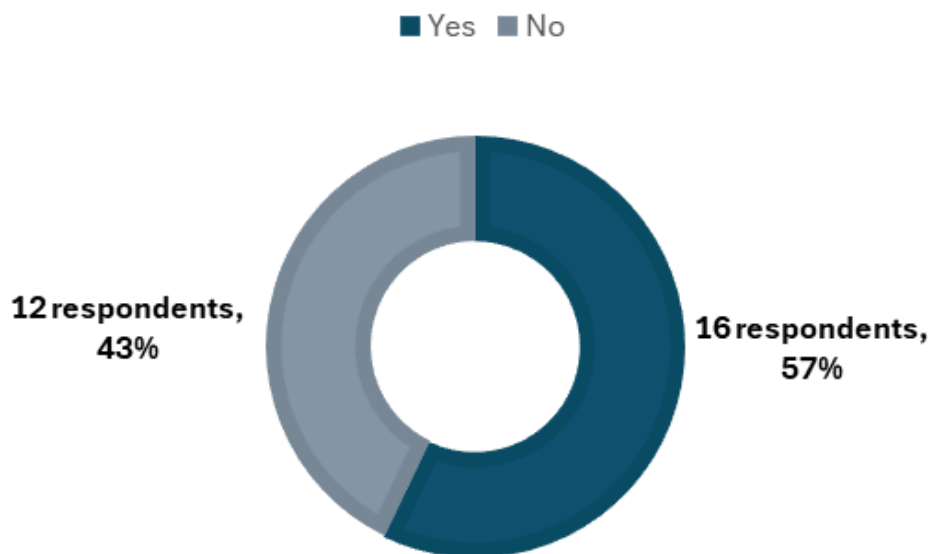
Board Inclusion of Diverse Identities

Respondents were asked how they felt the board was doing to include people of a variety of identities.

- 19 respondents (74%) stated inclusion of LGBTQ identities was 'good-very good'
- 16 respondents (62%) stated inclusion of people of diverse ages was 'good-very good'
- 15 respondents (58%) stated inclusion of BIPOC identities was 'good-very good'
- 11 respondents (43%) stated inclusion of people with disabilities was 'poor-very poor'
- 8 respondents (31%) stated inclusion of people of diverse religious identities was 'poor-very poor'
- 6 respondents (23%) stated inclusion of people with diverse economic backgrounds was 'poor-very poor'

Respondents were asked if board membership was accessible to everyone/all identities. Data indicated:

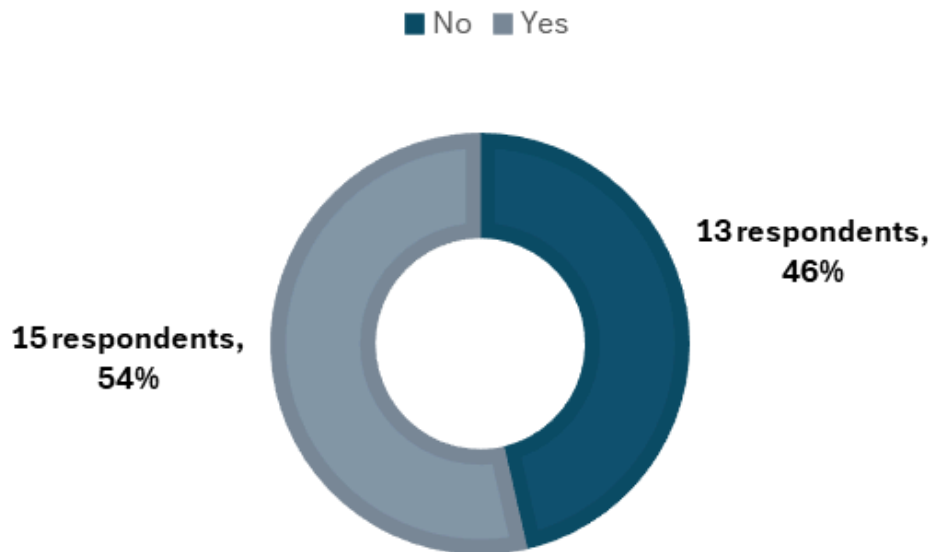
A MAJORITY OF TRUSTEES FEEL THE BOARD IS ACCESSIBLE TO ALL PEOPLE



Identity as a Barrier to Board Engagement

Respondents were asked if they felt their engagement with the board was limited in any way due to their individual identities. Data indicated:

A MAJORITY OF TRUSTEES FEEL THEIR IDENTITY LIMITS THEIR BOARD ENGAGEMENT



- Factors that were identified as self-perceived barriers to board engagement include; BIPOC identity (2), religious identity (1), religiosity (3), LGBTQ identity (1), economic background (2), educational experience (1), and age (5), and 'some other demographic factor' (6)

Board Culture & Functioning

Board Culture

- 28 respondents (100%) agreed-strongly agreed that the board reflects a sense of mutual concern/care
- 24 respondents (92%) agreed-strongly agreed board inclusivity is an organizational asset
- 22 respondents (85%) agreed-strongly agreed the board actively recruits from underserved communities
- 19 respondents (73%) agreed-strongly agreed the board consistently applies inclusive decision making
- 11 respondents (42%) agreed-strongly agreed the board regularly critiques issues of power and privilege

Board Functioning

- 26 respondents (100%) agreed-strongly agreed there is at least 1 trustee they could go to for support
- 22 respondents (85%) agreed-strongly agreed that their board engagement is fulfilling
- 21 respondents (81%) agreed-strongly agreed that board expectations are reasonable
- 20 respondents (77%) felt they have opportunities to serve in ways that interest them 'sometimes-often'
- 15 respondents (57%) felt some trustees dominate conversation 'sometimes-often'

Emergent Themes

For this report, emergent themes were identified through applying Thematic Content Analysis to data gathered from the 16 individual interviews, and the 5 focus groups conducted with [organization] Trustees and staff members that were completed as part of this project. This method involves a process of analysis and reflection that first applies codes to important segments of narrative language in each interview or focus group, and then organizes/categorizes these codes into themes identified as particularly salient across the entire qualitative dataset. In the current evaluation, 5 primary themes were identified: (1) alignment of values and purpose; (2) reflections on privilege and power; (3) process and product tensions; (4) Jewish identity and board membership; and (5) Board and staff relationships.

Alignment of Values & Purpose

This theme refers to language that referenced strong sentiments of value-alignment or inspiration felt on the part of trustees within their experience on the board or organization. In many cases this theme emerged in discussion of motivations for joining [organization], and frequently included specific mention of charismatic [organization] leadership that was the starting point of the [organization] journey for many interviewees. Other aspects of this theme included consistent identification of the resonance of [organization]' organizational mission, and a sense of connection to board engagement as a way to express Jewish values (Tzedaka, Tikkun Olam etc.). This theme also encompassed statements of deep respect and appreciation for others; specifically regarding the skills, intelligence, collegiality, and kindness of the board/staff as a whole. There were consistent statements among interviewees that many feel a deep sense of mutuality, and often a recognition that (even with its challenges), the [organization] board is in many ways exemplary in comparison to other board experience trustees have had.

Reflections on Privilege & Power

This theme can be understood as language that explored or described issues of power or privilege within the context of the [organization] Board within three sub-themes of race, economic, and time-based challenges. With regard to race, many white trustees noted a recognition of their cohort's historic power and privilege in [organization], and a desire to learn and improve to become more understanding, inclusive, and affirming of perspectives of others. Many interviewees mentioned a positive recognition of the board's efforts to diversify membership in a variety of ways. However, mention of race-related micro-aggressions witnessed or experienced by interviewees were also common. And a few people spoke at length about a feeling that there is a difference between a racially diverse board, and structures and practices of a board that reflect anti-racist principles. Furthermore, there was some language within this theme that expressed a questioning of or resistance to the perspective that it is valuable for the board to engage in ongoing in-depth diversity, equity, inclusion and racial justice (DEIRJ) work.

Regarding economic issues within this theme, language identified consistent mention of economic resources as they relate to board membership or engagement. While some stated they felt no sense of economic inequity within the board, others noted that there appears to be an evolution within board membership from what was once a more 'fundraising board' to a more 'working board.' Related to this change, there appears to be some uncertainty and discomfort around how a person's economic stability may or may not impact their capacity to engage with [organization] (international travel, board meetings etc.), or the more ambiguous discomfort that might arise from the high degree of economic privilege reflected by some trustees.

Time was a final aspect of privilege and power that was commonly mentioned. There appears to be some overlap between this domain and economic issues, as the issue of time privilege was often mentioned in the context of retirement or work responsibilities. The most significant aspect of time-related issues was consistent mention of the tension younger trustees or trustees with full-time employment experience with regard to balancing board responsibilities. There appears to be broad interest in thinking creatively about how to expand ways in which

trustees can meet their responsibilities, beyond the existing structures/methods, that might be more accessible for those with less-flexible schedules.

Jewish Identity & Board Membership

This theme refers to commonly expressed curiosity and/or tension about where Jewish identity fits into discussions of board inclusivity and diversity. Many interviewees noted the positive way in which Jewish identity or values contributed to a sense of unity or alignment among the board, with some expressing that their engagement with board activities is where they 'feel the most Jewish.' There was also a wide range of sentiments related to the question of whether or not diversification/inclusion efforts within the board should explicitly seek to include more non-Jewish trustees in the future. While some of these sentiments expressed a concern about maintaining the 'Jewish identity' or culture of the trustee group, most reflected positively on the possible value of expanding the board to more non-Jewish trustees; particularly if focused on bringing in people with skills or experiences that the board is in need of. Expanding the board in this way was most commonly expressed in the context of considering creative ways for the board to more proactively include representation from communities served by [organization]. Almost all conversations that touched on this theme included mention of a perceived need to have direct conversation about this topic amongst the board.

Process & Product Tensions

This theme includes language that addressed support of or resistance to the way the board engages in DEIRJ work. Most interviewees noted the value or appreciation of the board's efforts in this domain. For many trustees, the structured and consistent manner in which the board has engaged in this work over the past few years has been illuminating and encouraging. And many interviewees noted that part of why they feel fulfilled as a trustee/staff is because of the relational bonds or quality time they get with one another. However, a few interviewees expressed some dissatisfaction with the amount of time being devoted to relational work (process), and would rather focus more on the work that they believe needs to be accomplished (product). There appears to be some overlap, here, with time tensions described above. Additionally, and perhaps most importantly, there was some reflection from interviewees that suggested a sense that while the board overall expresses a stance of being open to self-reflection/analysis related to DEIRJ work, there remains a discomfort or resistance to truly dig into deep parts of these conversations that would challenge trustees/staff to acknowledge and address limitations, blind spots, and where structural growth remains necessary.

Board & Staff Relationships

This theme included any language that expressed a reflection on the quality and/or scope of interactions between the [organization] Board and staff. There was consistent mention within this theme of concerns about racial microaggressions experienced by staff, coming from trustees. There were also a few statements that suggested there exists a tension between staff and the board, due to such uncomfortable interactions or a lack of positive relationships or communication between the two groups. There were also contrary expressions of strong relationships between trustees and staff, and a number of trustees expressed great appreciation of and admiration for [organization] staff. Some interviewees expressed a desire for more points of contact and improved relationships between staff/trustees, but also noted a concern about overburdening staff, and a sense of recognition that the staff does a lot of work in service to the board. There also was a common reflection that the issue of board/staff relationships may not be a topic that is within the scope of this board inclusivity project.

Recommendations for Supporting [organization] Trustee Inclusion and Engagement

The recommendations provided within the four areas below reflect extensive [organization] stakeholder input (trustees and staff) gathered through survey data, interviews, focus groups and collaborative workshops. Recommendations are all intended to support increased engagement and inclusion amongst [organization] Trustees, and are accompanied by descriptions, supportive examples, and brief rationale.

Key Recommendation Areas



Recommendation Area 1: Training & Education

Data gathered through this project suggest the potential value and impact of providing [organization] Trustees with ongoing training and education opportunities related to specific aspects of diversity, equity and inclusion concepts and skills. It is recommended that [organization] Board leadership work to identify the resources and qualified personnel necessary to address the topics described below, and work with all trustees to develop a bank of resources/facilitators, and an explicit schedule of when these activities will take place.

Core Element 1: Examine Organizational Power and Privilege Through Critical Theory

Many trustees and staff emphasized issues of power and privilege they feel limit their positive engagement with the board. Because these barriers to engagement mostly reflected experiences with racial, economic and time-based challenges, providing training specifically designed to examine and explore these topics through culturally responsive methods grounded in critical theory could be a powerful method of improving trustee engagement².

Some examples of training topics or theoretical approaches that may be particularly useful include:

- Understanding and combating unconscious bias and microaggressions
- Deconstructing white supremacy culture in organizations through anti-racism or Critical Race Theory
- Exploring concepts of intersectionality and cultural competence
- Applying queer theory or Family Impact Analysis in pursuit of organizational equity

Core Element 2: Develop Allyship Capacity in Support of Historically Marginalized Communities

² Some resources or trainings on these topics already exist within [organization], so identifying where/what they are, and starting with these is likely to be a good place to begin.

Because many trustees identified a sense of limitation in their board engagement due to a wide array of marginalized personal identities, providing opportunities for trustees to identify and develop specific ways to support and affirm such communities could be a transformative way for trustees to take an active role in fostering a sense of inclusion and belonging for all board members. It is particularly valuable for individuals who are not part of a given marginalized community to develop practical skills that allow them to ‘show up’ in support of others, and actively ensure that the burden of inclusion and equity work does not only fall on members of historically marginalized communities. Including skill-based training focused on allyship can be a practically valuable supplement to knowledge or awareness-building training such as those recommended above.

Core Element 3: Facilitate Creative and Interactive Learning Opportunities

While it is clear that engaging in learning opportunities is a fundamental responsibility of the [organization] Board, many trustees and staff note a sense of limited time for board activities, and that the board engages in ‘too much’ learning. Thus, it seems particularly valuable that the board review how it conducts these learning moments, and endeavors to provide more creative, engaging, and enjoyable methods of learning for trustees in the future. Some possible ways this could be accomplished may include:

- Creating a schedule of learning activities/resources (books, videos, films, music, art etc.) that reflect many forms of expressing knowledge, and are accessible to many learning styles
- Developing a model of peer-to-peer leadership for learning opportunities, where trustees rotate taking a ‘facilitator’ role for a topic/content, and help guide the rest of the trustees through the learning process
- Working to include experiential learning opportunities, where trustees can participate in or attend an activity in person, and connect the experience back to [organization] committee or full-board activities

Recommendation Area 2: Structural Development

To supplement the training and education efforts described above, it is recommended that the [organization] Board of Trustees continues to develop organizational structures and policies that foster greater engagement and inclusion of all trustees. Below are three ways such structural development could be approached that could be impactful ways of reducing existing challenges with board engagement identified through this project.

Core Element 1: Include Multiple Engagement Style Options Across All Activities

Many stakeholders identified a tension between the responsibilities of being a trustee, and various aspects of their day-to-day lives; such as other work or family responsibilities. And while most trustees and staff also expressed a commitment to their trustee role, and respect for one another as professionals and colleagues, some feel a sense of guilt or frustration when they cannot participate in board activities in a way that makes sense to them, or fits their existing needs. Therefore, a way to address these challenges would be to commit to providing alternative methods of participating in all board activities. Developing these options will take time and effort, but some examples might include:

- Building asynchronous participation options into all committee meetings or projects
- Designing multiple methods of engagement for any given task/activity/product; such as conversational, small group, written, or video-based ways of contributing

Core Element 2: Develop and Implement a Restorative Conflict/Repair Model

Data collected from this project revealed the particular issue of tension, frustration, or harm experienced by trustees and/or staff that occasionally arises through interpersonal interactions in [organization] settings. The most common example of this is the issue of racial microaggressions experienced by people of color within [organization]. Data and conversations around this topic, however, also revealed that there is some ambiguity about how such instances are or should be handled within the context of the board. For this reason, it appears there is great value in the idea of identifying and implementing a specific model of organizational conflict and repair to structure how such moments could be appropriately addressed in a way that centers accountability, interpersonal dialogue, and healing. Given the organizational mission, values, purpose and personnel of [organization], a model grounded in concepts of restorative justice/repair would likely be a strong fit for this context. One way to get this process started is to develop a sub-committee centered on organizational conflict/repair, whose objective would be to examine various restorative approaches to organizational conflict, select a preferred model, and develop a plan for implementing this model into the structure of the [organization] Board.

Core Element 3: Build ‘Process’ Objectives Into All Measurement of Success

Because this project identified a tension between ‘product’ and ‘process,’ it is recommended that efforts are taken to build process objectives into all [organization] Board task forces, committees, projects, etc. Process objectives are clearly defined, measurable outcomes that can be designed to center relational, interpersonal, and/or self-reflective work that are often a central aspect of organizational DEIRJ initiatives. By building such metrics into how success is defined, it is possible to build greater buy-in for [organization]’ DEIRJ efforts, as it will not only signal organizational commitment to these aspects of board activities, but also help trustees understand why ‘process’ is valuable, and clarify the goals of these efforts. If the concept of developing process objectives is unfamiliar to [organization] Board leadership, identifying a third party organizational evaluator, or professional experienced in culturally responsive program design could help guide this effort.

Recommendation Area 3: Inclusivity & Relationships

Many stakeholders engaged through this project suggested a variety of ways that the [organization] Board of Trustees could improve its degree of inclusive practices, or interpersonal relationships. These suggestions directly address a number of issues identified through this project’s data analysis; particularly with regard to expanding who is included in [organization] Board activities, and improving interpersonal relationships both among trustees and between trustees and staff members.

Core Element 1: Create a Board Advisory Council

Data gathered through this project revealed a common interest in discussing or exploring how to expand the board to include more non-Jewish people. These expressions often explored the idea of how the board could include more people who are representative of, or members of communities served by [organization]. While there are a number of logistical problems that might make traditional board membership difficult for people outside of the United States, many trustees seem interested in the idea of developing a form of a Board Advisory Council that would be comprised of carefully selected individuals either from communities served by [organization], or from grantee organizations of [organization]. The function of this group could be to regularly provide insight into [organization] activities across the globe, or feedback on aspects of board activities that relate to [organization]’ program delivery.

Core Element 2: Improve Trustee Mentorship Program

A number of trustees recommended re-invigorating and improving the existing trustee mentorship program. Literature on these types of programs, particularly when focused on providing support to newer trustees, or trustees from historically marginalized populations can have a significantly positive impact on sense of belonging and improved interpersonal relationships. Because a mentorship program already exists in this context, this is a highly recommended suggestion, as it would be a relatively low-cost, high-reward action to take to improve engagement and inclusion.

Core Element 3: Expand Trustee and Staff Interaction/Collaboration

Considering data that suggests there exists both tension between trustees and staff, and a desire to improve on these relationships, it is recommended that specific steps be taken to expand ways in which [organization] trustees and staff interact. Stakeholders who addressed this issue provided a number of ways this could be accomplished, such as inviting staff members that have close relationships with grantees to board meetings when grantees are guests. There are also ways in which a ‘buddy’ or mentor program could be developed that helps build 1-on-1 relationships and understanding between staff members and trustees. While these ideas have potential to improve interactions between staff and trustees, it is imperative that they be designed in a way that does not drastically increase the burden of time or work that staff members have, in service to the board.

Recommendation Area 4: Ongoing Evaluation

While the [organization] Board of Trustees Inclusivity and Engagement project is an encouraging indicator of the board’s commitment to DEIRJ efforts, stakeholder input gathered through this project and literature on organizational equity and inclusion suggests the need to regularly re-evaluate, and improve on these efforts over time. It is highly recommended that [organization] continue their outstanding efforts in this domain through specific and ongoing practices of evaluation.

Core Element 1: Conduct a Policy Analysis Grounded in Critical Theory

Some stakeholder input emphasized a recognition of the need to go beyond increasing diversity of the people who make up the board, to explore structural changes that could be made to improve organizational equity and inclusion. One important step towards such structural changes can be made through policy analysis grounded in a critical theory related to equity and/or inclusion (e.g. Critical Race Theory, Anti-Oppressive Theory). This process would include a qualified policy analyst designing and implementing an evaluation of [organization] Board policies, through a specific lens intended to highlight issues and opportunities related to how well organizational policies support inclusive trustee engagement. This type of information, coupled with already-completed efforts like the [organization] Racial Equity Audit, and this Board Inclusivity and Engagement Project can be a complementary step towards a holistic organizational approach to supporting diversity, equity and inclusion across all facets of [organization].

Core Element 2: Develop an Equity and Inclusion Evaluation Plan

To ensure the findings of this Board Inclusivity and Engagement Project contribute to sustained commitments and actions designed to foster diversity, equity and inclusion within the [organization] Board of Trustees, it is important to continue to provide resources and attention to this topic in the future. This can be accomplished effectively by developing an evaluation plan that specifically maps out points of time in the future when questions of trustee engagement and inclusion are re-visited, so as to examine where improvements have been made, what strategies/activities have worked and what has not worked, and where growth still needs to be supported. To ensure that this process is done reliably, it is recommended the board develop a specific strategic evaluation plan that covers a period of at least 5 years.