



# **DEIJ in Action:**

**A Diversity, Equity, Inclusion, and Justice  
Guide for the Chesapeake Bay Watershed**

**Prepared for  
the Chesapeake Bay Watershed Region**

**May 2019**

Sponsored by:



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# Executive Summary

## Introduction and Purpose

In May 2017, the Chesapeake Bay Trust (CBT), the Chesapeake Bay Funders Network (CBFN) and the Choose Clean Water Coalition (CCWC) launched a significant, collaborative initiative to assess the state of diversity, equity and inclusion (DEI) among organizations working on environmental issues in the Chesapeake Bay Watershed and to develop a DEIJ Guide with recommendations for how organizations working on environmental issues and the funders who support them, can increase DEIJ within their organizations. (Note, the project started with a focus on DEI during the assessment phase, and later expanded to DEIJ which includes justice. When referring to work conducted during the assessment phase, this guide will use the term “DEI.” When referring to work going forward, this guide will use the term “DEIJ.”) This effort represented the first assessment effort of its kind within the Chesapeake Bay Watershed restoration community. The impetus for launching this initiative grew out of several DEIJ efforts already being led by these three organizations to address a recognized lack of diversity, equity, inclusion and justice in our environmental community, and a desire to assess the readiness of their grantees and member organizations to advance DEIJ.

The primary purpose of the DEIJ Guide is to provide a path forward on DEIJ for organizations working on environmental issues in the Chesapeake Bay Watershed. While this guide is not as granular as a ‘how to’ document, we hope the recommendations included herein will serve as a pathway with which to advance DEIJ strategies within individual organizations and regionally. More importantly we view this document as a living document that will be updated over time and will serve to enhance the culture of assessment of our own community, leading to continuous improvement for the funding entities, non-profits organizations, local governments, and ultimately the residents of this region. Many recommendations include a specific focus on DEIJ as it relates to communities of color and race-based disparities; this focus is intentional due to our nation’s history of race-based discrimination and the related split between the environmental movement and the environmental justice movement.

At this time CBT, CBFN, and CCWC have committed to operating as a learning community and to advancing the learning of others in this space to promote a more equitable watershed restoration movement. This guide codifies these efforts and allows for each member of the Chesapeake Bay community to either begin or continue efforts to address issues of diversity, equity, inclusion, and justice. With progress in mind we look forward to continuing to develop DEIJ efforts together.

## Planning Process

To conduct the DEI readiness assessment and inform the recommendations, the project team:

- developed an assessment framework,
- conducted training workshops with CBFN and CCWC,
- facilitated roundtable discussions with CBFN, CCWC and environmental justice leaders,
- conducted a survey of funders (including 25 respondents from 15 organizations) and organizations working on environmental issues (including 199 respondents from 122 organizations),
- and facilitated a dialogue with conference attendees at the 2017 and 2018 Choose Clean Water Conferences.

The information gathered from these activities is summarized in the set of findings below and formed the basis for the recommendations included in this plan.

## DEI Challenges and Opportunities

Based on outcomes of the readiness assessment, the project team identified the following priority challenges and opportunities to be addressed by the DEIJ Guide:

## *DEI Values*

1. Participants generally believe:
  - DEI is valuable to environmental work;
  - That their organizations are working proactively towards diverse partnerships; and
  - DEI is valuable to advance their organization's mission, help reflect and serve diverse populations, and broaden the organization's base for advocacy
2. Organizations have a gap between the high value placed on DEI and their ability to advance DEI outcomes.

### *Advancing DEI Outcomes within Organizations*

3. Organizations often lack an explicit commitment to DEI in their policies and operations.
4. Organizations expressed a need to increase their internal diversity of underrepresented groups.
5. Organizations expressed a need to increase their DEI capacity at all levels of the organization (e.g., board, senior management, staff, and volunteers).

### *Advancing DEI Outcomes in Environmental Work*

6. Organizations expressed a need to engage underrepresented groups more fully.
7. Organizations lack capacity to increase partnerships with diverse and underserved communities.

### *Advancing DEI Outcomes through Grantmaking*

8. The grantmaking process tends to not explicitly and consistently incentivize or fund the promotion of DEI.
9. Grantmakers tend not to directly fund environmental justice organizations or work.

## **Recommendations for Advancing DEIJ in the Chesapeake Bay Watershed Region**

This guide outlines a series of recommendations for advancing DEIJ, which are organized into the following focus areas.

### **Advancing DEIJ Outcomes within Organizations**

1. Institutionalize DEIJ within your organizational culture.
2. Increase diversity among board and staff.
3. Increase DEIJ capacity at all levels of the organization (e.g., board, senior management, staff, and volunteers).

### **Advancing DEIJ Outcomes in Environmental Work**

1. Build long-term relationships with underrepresented communities to address community identified needs.
2. Increase capacity for partnerships with diverse and underserved communities.

### **Advancing DEIJ Outcomes through Grantmaking**

1. Build support and clarity for DEIJ grantmaking goals, evaluation, and process.
2. Build the internal DEIJ capacity of environmental grantees.
3. Build the capacity of low-capacity groups to receive grants directly.
4. Prioritize funding for projects that advance benefits to and equitable partnerships with communities of color and underserved communities (over projects that simply advance engagement of these communities).

### **Regional Investments to Amplify DEIJ Outcomes**

1. Build the capacity of smaller community-based organizations.
2. Build the internal DEIJ capacity of funders and organizations working on environmental issues.
3. Build relationships with environmental justice and social justice community-based organizations to inform and guide further DEIJ actions.
4. Make the case that DEIJ advances watershed restoration.

## Developing a DEIJ Action Plan

This guide concludes with a step-by-step process for individual organizations to develop a DEIJ Action Plan building from the recommendations and strategies in the guide. Each step in the process is described in detail, including tools and templates that can help with each step. The action planning process emphasizes conducting the *internal organizational* DEIJ work first. Successful DEIJ outcomes depend on adopting both the *administrative* changes to policies and metrics, along with *cultural* changes within the organization needed to embrace DEIJ as a value integral to the organizational mission.

The action planning guidance includes the following foundational principles:

### DEIJ Process

- ✓ Start with the inner work.
- ✓ Include staff from all levels, especially younger staff, in decision-making about DEIJ.
- ✓ Ensure your board is on board. And, more broadly, address potential resistance/hesitation to DEIJ at any level proactively.
- ✓ Solicit feedback and engage underrepresented groups in all phases of priority setting and decision making within organizations, funders, and related collaboratives (may include feedback from stakeholders outside your organization, as appropriate).

### DEIJ Actions

- ✓ Evaluate your mission for alignment with DEIJ.
- ✓ Integrate DEIJ into priority setting and organizational operations.
- ✓ Set DEIJ goals that are actionable and measurable.
- ✓ Set a cycle for evaluation and reporting on progress.

In addition, the action planning guidance includes a summary of the recommendations and strategies in this guide along with classifications indicating (1) whether each strategy addresses diversity, equity, inclusion and/or justice and (2) the level of complexity. The levels of complexity were assigned using the following classification system:

1. These strategies are either foundational activities or require a lower level of DEIJ capacity within the organization.
2. These strategies may require a moderate level of effort or resources, as well as a moderate level of DEIJ capacity within the organization.
3. These strategies require a higher level of effort or resources, as well as a higher level of DEIJ capacity within the organization.

The classifications for level of complexity are intended to serve as a guide, recognizing that some strategies may span levels of complexity or be more or less challenging for different organizations. Each organization that uses this action planning guidance will undoubtedly have their own unique starting points and DEIJ priorities, and should tailor their organization's action plan accordingly.

## Chapter 1: Introduction and Call to Action

### Purpose and Background

In May 2017, the Chesapeake Bay Trust (CBT), the Chesapeake Bay Funders Network (CBFN) and the Choose Clean Water Coalition (CCWC) launched a significant, collaborative initiative to assess the state of diversity, equity and inclusion (DEI) among organizations working on environmental issues in the Chesapeake Bay Watershed and to develop a DEIJ Guide with recommendations for how organizations working on environmental issues and the funders who support them, can increase DEIJ within their organizations. (Note, the project started with a focus on DEI during the assessment phase, and later expanded to DEIJ which includes justice. When referring to work conducted during the assessment phase, this guide will use the term “DEI.” When referring to work going forward, this guide will use the term “DEIJ.”) This effort represented the first assessment effort of its kind within the Chesapeake Bay Watershed restoration community. The impetus for launching this initiative grew out of several DEIJ efforts already being led by these three organizations to address a recognized lack of diversity, equity, inclusion and justice in our environmental community, and a desire to assess the readiness of their grantees and member organizations to advance DEIJ.

The initiative seeks to build upon the work of other national DEI leaders in the watershed, environmental and foundation fields by providing insight into the specific challenges and opportunities facing funders and organizations who are working to restore clean water to the Chesapeake Bay watershed. While many resources have been influential, perhaps the most significant touchstone is the 2014 report released by Green 2.0 which addresses the state of diversity in the environmental sector (NGO’s, government, philanthropy) at the national scale. See the textbox below for a summary of the key findings of this report.

#### The State of Diversity in Environmental Organizations (2014)

In 2014, the Green 2.0 Initiative conducted an assessment of diversity in the environmental sector at the national scale. The groundbreaking and comprehensive report “The State of Diversity in Environmental Organizations: Mainstream NGOs, Foundations & Government Agencies” establishes three main factors that prop up an “overwhelmingly white ‘Green Insiders’ Club” within the environmental field:

1. *The Green Ceiling.* Despite increasing racial diversity in the United States, the racial composition in environmental organizations and agencies has not broken the 12% to 16% “green ceiling” that has been in place for decades.
2. *Unconscious Bias, Discrimination, and Insular Recruiting.* Confidential interviews with environmental professionals and survey data highlight alienation and “unconscious bias” as factors hampering recruitment and retention of talented people of color.
3. *Lackluster Effort and Disinterest in Addressing Diversity.* Efforts to attract and retain talented people of color have been lackluster across the environmental movement.”

The report also identifies six factors that make diversity initiatives successful: “(1) Adequate and stable funding, (2) Adequate and committed leadership, (3) Adequate organizational buy-in, (4) Ability to communicate across race, class, gender, and cultural lines, (5) Institutionalizing diversity, equity, inclusion goals, and (6) Translate diversity training into action.”

Sources: Taylor, Dorceta. 2014. Green 2.0 Highlights Handout. Pages 1 & 4. Online: [https://www.diversegreen.org/wp-content/uploads/2015/10/Highlights\\_Green2.0\\_FINAL.pdf](https://www.diversegreen.org/wp-content/uploads/2015/10/Highlights_Green2.0_FINAL.pdf). Accessed 15 February 2019.



The primary purpose of the DEIJ Guide is to provide a path forward on DEIJ for organizations working on environmental issues in the Chesapeake Bay Watershed. While this guide is not as granular as a 'how to' document, we hope the recommendations included herein will serve as a pathway with which to advance DEIJ strategies within individual organizations and regionally. More importantly we view this document as a living document that will be updated over time and will serve to enhance the culture of assessment of our own community, leading to continuous improvement for the funding entities, non-profits organizations, local governments, and ultimately the residents of this region. Many recommendations include a specific focus on DEIJ as it relates to communities of color and race-based disparities; this focus is intentional due to our nation's history of race-based discrimination and the related split between the environmental movement and the environmental justice movement.

At this time CBT, CBFN, and CCWC have committed to operating as a learning community and to advancing the learning of others in this space to promote a more equitable watershed restoration movement. This guide codifies these efforts and allows for each member of the Chesapeake Bay community to either begin or continue efforts to address issues of diversity, equity, inclusion, and justice. With progress in mind we look forward to continuing to develop DEIJ efforts together.

## Planning Process Overview

To assess the state of diversity, equity, and inclusion in the Chesapeake Bay Watershed and to develop a DEIJ Guide for the Chesapeake Bay Watershed Region, the project team:

- Developed a DEI assessment framework based on best practices in the field.
- Conducted DEI training workshops with the Chesapeake Bay Funders Network and the Choose Clean Water Coalition steering committee to build capacity for these discussions within the organizations.
- Designed and conducted a DEI Readiness Assessment to gather and analyze information about the current state of DEI practice in the watershed and the challenges and opportunities faced by foundations, NGOs, environmental justice groups and others working to advance environmental goals. This included engagement with a variety of perspectives on DEI in the Chesapeake Bay Watershed, including:
  - Roundtable discussion with CBFN funders
  - Roundtable discussion with CCWC members and steering committee
  - Roundtable discussion with representatives of the environmental justice community and representatives from underserved and marginalized communities within the Chesapeake Bay Watershed
  - DEI Assessment survey of funders (including 25 respondents from 15 organizations) and organizations working on environmental issues (including 199 respondents from 122 organizations)
  - Dialogue and feedback with conference attendees through sessions at the 2017 and 2018 Choose Clean Water Conferences.
- Developed this DEIJ Guide based on the priority challenge and opportunity areas identified by the DEI Readiness Assessment.

For a more detailed description of the project timeline and additional tasks and capacity building activities that took place throughout the process, see Appendix 1.

## Important Terms

Before undertaking the planning process, the group worked together to define key terms that are the focus of the assessment and planning effort. The project team agreed to define key terms as a first step to ensure each term within DEIJ has a unique meaning and different implications for action. The selected definitions are viewed as part of

a “Living Glossary,” meaning that the project team acknowledges that definitions change and grow over time as the people using them change and grow. This framing is intended to allow the flexibility needed to continue learning and refining a shared language as the work continues.

These terms include:

- *Diverse/Diversity* – The demographic mix of a specific collection of people, taking into account elements of human difference. (e.g., racial, and ethnic groups, income, spectrum of built environment settings (rural to urban), faith communities, LGBTQ+ populations, people with disabilities, gender, relationship to the natural environment)
- *Equity* – Improving equity is to promote justice, impartiality and fairness within the procedures, processes, and distribution of resources by institutions or systems. Tackling equity issues requires recognition of the underlying or root causes of disparities within our society.
- *Inclusion* – Refers to the degree to which diverse individuals are enabled to participate fully in the decision-making processes within an organization or group. While a truly “inclusive” group is necessarily diverse, a “diverse” group may or may not be “inclusive.”
- *Underserved* – Populations who receive inadequate or inequitable services, who experience quality-of-life disparities, and who by design have little power or influence over outside decisions that impact their daily quality-of-life.

Note: Marginalized communities have been referred to by a variety of terms over the years, including but not limited to: disadvantaged, at-risk, underserved, under-engaged, underrepresented, overburdened, overlooked, and untapped. Each term has grown out of a different context and tries to get at a slightly different aspect of the experiences of these communities. However, depending on context some terms (regardless of intent) could be viewed as pejorative by the community. Therefore, context is important when determining what term(s) to use and ideally the community itself can best identify what term to use that best describes their experiences. For this reason, it is important to view definitions as part of a “Living Glossary” that is updated both as the field of DEIJ evolves and in response to local context.

In addition, over the course of this two-year project, continuing conversations in the Chesapeake Bay Watershed non-governmental organization community have expanded “DEI” to “DEIJ” with concept of justice becoming more central to this work. Therefore, the group added the following definitions to the list of important terms:

- *Justice* – the quality of being just, impartial, or fair.<sup>1</sup>
- *Social Justice* – equal access to wealth, opportunities, and privileges within a society.<sup>2</sup> This may mean addressing the present-day impacts of past inequities in order to achieve equity going forward.
- *Environmental Justice* – the fair treatment and meaningful involvement of all people regardless of race, color, national origin, or income with respect to the development, implementation, and enforcement of environmental laws, regulations and policies<sup>3</sup>, and refers to “decisions [that] support sustainable communities where people can interact with confidence that their environment is safe, nurturing, and productive...”<sup>4</sup>

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<sup>1</sup> Merriam-Webster: <https://www.merriam-webster.com/dictionary/justice>

<sup>2</sup> Pachamama Alliance: <https://www.pachamama.org/social-justice/what-is-social-justice>

<sup>3</sup> U.S. EPA: <https://www.epa.gov/environmentaljustice/learn-about-environmental-justice>.

<sup>4</sup> Bunyan Bryant, PhD., Professor Emeritus, former Director of the Environmental Advocacy Program at University of Michigan School for Environment and Sustainability.

## Priority Challenges and Opportunity Areas

Based on outcomes of the readiness assessment, the project team identified the following priority challenges and opportunities to address in the DEI Plan:

### *DEI Values*

1. Participants generally believe:
  - DEI is valuable to environmental work;
  - That their organizations are working proactively towards diverse partnerships; and
  - DEI is valuable to advance their organization's mission, help reflect and serve diverse populations, and broaden the organization's base for advocacy
2. Organizations have a gap between the high value placed on DEI and their ability to advance DEI outcomes.

### *Advancing DEI Outcomes within Organizations*

3. Organizations often lack an explicit commitment to DEI in their policies and operations.
4. Organizations expressed a need to increase their internal diversity of underrepresented groups.
5. Organizations expressed a need to increase their DEI capacity at all levels of the organization (e.g., board, senior management, staff, and volunteers).

### *Advancing DEI Outcomes in Environmental Work*

6. Organizations expressed a need to engage underrepresented groups more fully.
7. Organizations lack capacity to increase partnerships with diverse and underserved communities.

### *Advancing DEI Outcomes through Grantmaking*

8. The grantmaking process tends to not explicitly and consistently incentivize or fund the promotion of DEI.
9. Grantmakers tend not to directly fund environmental justice organizations or work.

For a more in-depth description of the outcomes of the DEI Readiness Assessment, please see Chapter 2. For the DEI Readiness Assessment survey, findings presentation, and summary memo, see Appendices 2-4.

## Call to Action: Embracing Organizational Change

Although environmental organizations often place an emphasis on the *external work* of community organizing and environmental outcomes, DEIJ leaders in the field have found they are more successful with their DEIJ goals if they lay a solid foundation of *internal organizational* DEIJ work first. In addition, successful DEIJ outcomes depend on embracing both the *administrative* changes to policies and metrics, along with *cultural* changes within the organization to embrace DEIJ as a value integral to the organizational mission.

Diving straight into evaluating what “diverse” communities or organizations to target for grants or partnerships can lead to short-term outcomes if done respectfully, but this approach will not fundamentally address the long-standing disparities and inequities institutionalized in land use policies and environmental organizations within the Chesapeake Bay Watershed. Transformational, lasting change on DEIJ issues will come from doing the sometimes difficult “internal work” first (or at least simultaneously) rather than jumping ahead to start with the environmental work or the grantmaking work.

Developing a DEIJ Action Plan for your organization can be a meaningful way to prioritize complementary phasing and an effective balance of investments that advance DEIJ outcomes within your organization as well as DEIJ outcomes in your environmental or grantmaking work. Chapters 3-5 of this guide are intended to provide a fairly comprehensive set of recommendations in each category. Due to time and resource constraints, most organizations using this guide will need to prioritize a subset of these actions with which to start – this subset of actions can be

captured formally in a DEIJ Action Plan. As you go through the process of developing your plan, keep in mind the following foundational principles:

### **DEIJ Process**

- ✓ Start with the inner work.
- ✓ Include staff from all levels, especially younger staff, in decision-making about DEIJ.
- ✓ Ensure your board is on board. And, more broadly, address potential resistance/hesitation to DEIJ at any level proactively.
- ✓ Solicit feedback and engage underrepresented groups in all phases of priority setting and decision making within organizations, funders, and related collaboratives (may include feedback from stakeholders outside your organization, as appropriate).

### **DEIJ Actions**

- ✓ Evaluate your mission for alignment with DEIJ.
- ✓ Integrate DEIJ into priority setting and organizational operations.
- ✓ Set DEIJ goals that are actionable and measurable.
- ✓ Set a cycle for evaluation and reporting on progress.

## **How to Use this Guide**

This guide includes recommendations for individual organizations working on watershed issues, funders, and regional networks. Use the checklist provided here to determine which chapters are most relevant to your organization.

- Chapter 2: DEI Readiness Assessment Findings* (page 10) – recommended for all organizations using this guide; lays the groundwork for understanding the current state of DEIJ values and outcomes among funders and organizations working on watershed issues as well as why this guide places significant emphasis on the primacy of internal DEIJ work for creating positive organizational and environmental change.
- Chapter 3: Advancing DEIJ Outcomes within Organizations* (page 16) – recommended for all organizations using this guide; offers significant detail on how to institutionalize DEIJ within your organizational culture.
- Chapter 4: Advancing DEIJ Outcomes in Environmental Work* (page 31) – recommended for all organizations working to restore clean water in the Chesapeake Bay Watershed. This includes foundations, as this chapter offers significant detail on how your grantees can conduct environmental work with a DEIJ lens.
- Chapter 5: Advancing DEIJ Outcomes through Grantmaking* (page 38) – recommended for all funders. Some organizations working to restore clean water may also wish to review this information to better understand the conversation about funder priorities related to DEIJ.
- Chapter 6: Regional Investments to Amplify DEIJ Outcomes* (page 46) – recommended for all organizations (both funders and organizations working on watershed issues) who are involved in DEIJ thought-leadership and collaborative efforts at the regional level.
- Chapter 7: Developing a DEIJ Action Plan for Your Organization* (page 49) – guidance on how to assess the recommendations of this guide and work with your board and staff to develop an action plan specific to the needs of your organization.

As you read, you may wish to use a simple notation system to capture your initial reactions to each recommendation and its relevance to your organization. The summary table provided in Chapter 7 could be used for this purpose.

There are multiple on-ramps to this work. The recommendations themselves are not organized as sequential steps and could be implemented simultaneously. Some actions may offer more benefit if started before others, so the bulleted considerations and action steps that follow each recommendation offer a loose suggestion of sequencing. Chapter 7 provides a series of steps so each organization can develop their own roadmap and DEIJ Action Plan with the recommendations, actions, and sequencing that will offer the most DEIJ value to their work.

## Chapter 2: DEI Readiness Assessment Findings

Chapter 2 of the DEIJ Guide is recommended for all organizations using this guide. It lays the groundwork for understanding the current state of DEIJ values and outcomes among funders and organizations working on watershed issues as well as why this guide places significant emphasis on the primacy of internal DEIJ work for creating positive organizational and environmental change.

The DEI Readiness Assessment gathered responses from individuals and thus offers some, but not necessarily the full perspective on the organizational status. Based on the participant responses, the DEI Readiness Assessment found that the Chesapeake Bay Watershed Region strongly values diversity, equity, and inclusion. Respondents generally believe:

- DEI is valuable to environmental work;
- That their organizations are working proactively towards diverse partnerships; and
- DEI is valuable to advance their organization's mission, help reflect and serve diverse populations, and broaden the organization's base for advocacy

However, the assessment also found that many organizations in the Chesapeake Bay Watershed Region are having trouble with operationalizing DEI, both within the structure of their organizations as well as in their environmental work. There is a significant gap between the value placed on DEI and the ability of funders and organizations working on environmental issues to advance DEI effectively. The more detailed findings are summarized below, and the full summary documents – including graphs of the results – can be found Appendices 3-5.

### Understanding the gap between DEI values and outcomes in the Chesapeake Bay Watershed Region

#### Ready for Change: The Chesapeake Bay Watershed Region is poised to tackle DEI

Respondents to the survey shared a strong belief in the value of DEI for their organizations and for environmental work.

- Over 92% of funders and organizations working on environmental issues believe in the value of DEI to advance environmental work.
- Over 86% of funders and organizations working on environmental issues believe their organization values DEI.
- Respondents tend to perceive their organizations as working proactively at developing partnerships with diverse or underserved communities.
- 93%+ of organizations working on environmental issues believe DEI can advance their organization's mission, help reflect and serve diverse populations, and broaden the organization's base for advocacy.
- 74-79% of organizations working on environmental issues believe DEI can improve the quality of their work life, improve hiring and retention of diverse staff, and broaden the organizations' opportunities for fundraising.
- 77-86% of funders believe DEI can advance their organization's mission, help reflect and serve diverse populations, and improve hiring and retention of diverse staff.
- 55-65% of funders believe DEI can improve the quality of their work life, broaden the organizations' base for advocacy.

- 38% of funders believe DEI can broaden the organization's opportunities for fundraising.
- For both funders and organizations working on environmental issues, respondents who did not agree or strongly agree with the statements above tend to either be neutral or indicate uncertainty about whether DEI would advance these outcomes.

Responses from the assessment participants demonstrate a high value on diversity, equity, and inclusion. This is good news! Furthermore, in areas where positive response rates are lower, respondents tend to indicate uncertainty rather than having deeply entrenched beliefs against the value of DEI.

### **Understanding the Challenge: Summary of some of the key disconnects between values, mechanisms, and outcomes**

Respondents to the survey shared numerous ways in which operationalizing their DEI values is difficult. Highlights include:

- Only 50-54% of organizations working on environmental issues and 23-36% of funders believe that their organization has an "authorizing environment" to support DEI and that their day-to-day priorities and programs reflect DEI goals.
- Only 22% of organizations working on environmental issues and 9% of funders believe that their organization has an effective process in place to monitor DEI progress.
- Most respondents do not believe their organization reflects the region's diversity at the board, senior management, or staff/volunteer/contractor levels.
- Respondents tend to believe their senior management has a higher capacity for DEI than their board; however, for both senior management and boards, respondents see a gap between their support and intent for DEI and the lack of skills and tools needed to advance DEI.
- Most respondents do not believe their organization is effective at recruiting, supporting, retaining, and/or promoting staff, volunteers and/or contractors from diverse backgrounds.
- Most respondents do not believe their organization's staff, volunteers and/or contractors have the skills and tools needed to advance DEI.
- Most organizations working on environmental issues struggle with finding the time, funding, or organizational support to develop diverse partnerships.
- Most funders struggle with lack of applications from diverse/underserved communities.
- Funder responses also indicate that more can be done to promote the prioritization of DEI applications as well as reduce barriers in the grantmaking process for organizations that serve underserved communities.
- When considering funding priorities, organizations working on environmental issues would prioritize DEI funding in the following order:
  1. Support relationship building and authentic community engagement in diverse and/or underserved communities.
  2. Directly invest in diverse and/or underserved communities.
  3. Develop organizational/internal DEI.
- 33% of organizations working on environmental issues and 25% of funders perceive a disconnect between establishing DEI partnerships and achieving their organization's mission.

These results indicate that while belief in DEI values may be strong, operationalizing DEI can remain an immense challenge. Both with internal culture and external mission-related work, many organizations in the Chesapeake Bay Watershed Region are struggling to successfully align their operations with their values when it comes to increasing and advancing DEI. These results underscore that it is not enough to value DEI or have good intentions regarding advancing DEI. Making positive change and achieving DEI outcomes requires something deeper.

## Examining Trends across Different Groups of Respondents

The Chesapeake Bay Trust conducted an analysis of the DEI Readiness Survey results that disaggregated the data based on respondent demographics in order to identify whether responses for certain topics differ across the types of respondents. For the full disaggregated data analysis, see Appendix 5. This analysis revealed the following insights:

### General

- Generally, responses rarely differed based on ethnicity of the respondent, but did differ based on age, gender, management role, and to some degree socioeconomics.
- Responses differed consistently based on the staff diversity of the respondent's organization, but not based on organization size or organization focus (environment only versus environment plus other issues).

### Demography

- Younger respondents indicated more than older respondents that DEI helps their organization advance their mission, but older respondents feel their organizations are more inclusive, better at supporting diverse staff, and more valuing of DEI.
- Women indicated a little more strongly than men that DEI practices are important and strengthen their organizations. Interestingly, men report that their organizations have more people of color on staff than women do, and older men indicated most strongly that their organizations are inclusive, welcoming, and representative of demographics of the region.
- Responses indicated no "great divide" in opinions between people of color and non-people of color.
- Respondents who self-report as lower income people of color responded differently than upper-income people of color and non-people of color on several issues: They responded that their organizations provide fewer tools and value DEI less. Self-reported lower income respondents indicated more concern about the DEI/mission connection in general.

### Organization Type

- Respondents (from both funders and organizations working on environmental issues) at organizations with a more even distribution of people of color within the staff indicated they have more tools and that their organization is working a little harder on DEI issues.
- Individuals from more diverse organizations working on environmental issues indicated the DEI/environment connection to be less of a challenge. Funders were the opposite: staff from more diverse funders indicated that the DEI/environmental connection is a greater challenge.
- Respondents from larger organizations indicated their organizations are a bit less welcoming and less open to feedback, though more likely to see DEI as strengthening of their mission.
- Organizations strictly focusing on environmental issues are perceived to hire less people of color than those that include other focus areas.

### Role within the Organization

- Staff members indicated slightly more programmatic importance in DEI work than board members.



- Board member respondents tended to indicate their organizations are working better at DEI, value DEI more, and are more inclusive than junior staff did, and more senior-level individuals indicated fewer challenges pertaining to DEI/environment connections.

The biggest driver of differences was how diverse staffs are: Tools might be developed for non- or less-diverse staffs, both to become more diverse in the future, and, in the meantime, to find stronger connections between environment/mission and DEI work and accomplish DEI goals in general.

### **Listening to Leaders from Environmental Justice Communities**

A facilitated roundtable discussion was held on November 27, 2017 for District of Columbia, Maryland, and Virginia Environmental Justice (DMV EJ) Coalition members as well as grassroots advocacy groups, environmental justice (EJ) organizations and neighborhood/community leaders. The purpose of the roundtable was to learn more about barriers to effective partnerships around environmental health between these leaders and CBFN/CCWC.

The roundtable engaged members of the Chesapeake Bay Watershed Region who were not likely to have been engaged through the DEI Readiness Survey and other roundtable conversations with CBFN and CCWC membership. Note that the summaries of barriers, opportunities and solutions below represent the perspective of these participants. These perspectives were immensely helpful in informing the recommendations of this guide found in Chapters 3-6.

#### **Barriers to connecting with funders and potential partners**

Participants identified common challenges and barriers to developing effective partnerships with CBFN and CCWC.

Primary barriers to joining CCWC include:

- not seeing an alignment between CWCC (mission and framing around environmental issues) and priorities of the environmental justice groups
- lack of awareness of CCWC
- cost concerns
- language barriers

Primary barriers to pursuing funding with the CBFN focused on the following categories in order of importance:

- grant application/qualification challenges
- grant management challenges
- relationship challenges

#### **Opportunities and Solutions**

Participants also discussed opportunities and solutions that could improve their relationship with funders and with the Coalition and help bridge the gaps and challenges identified earlier.

Some participants were familiar with CBFN and CCWC. These participants noted that CBT/CBFN's regional collaborative capacity building model might become a significant step forward in growing local capacity. They believe the results have been good and worth watching.

Key recommendations from participants for building on this work going forward include the following (note that while recommendations are divided roughly between CBFN and CCWC, some recommendations might apply to both or could be opportunities for partnering):

### *Recommendations for CCWC:*

- *Trust-building:* Work on building trust.
- *Advertise benefits of CCWC membership:* Work on describing what the benefits of membership in the CCWC are for local community groups.
- *Develop new, intentional partnerships with grassroots groups:* Make an effort to learn and partner with local community groups who are working to address water related issues.
- *Support creation of a resource hub approach:* Create a resource hub (or multiple hubs) across the region where lower capacity organizations or community groups can get support.

### *Recommendations for CBFN:*

- *Expand the roundtable conversation by investing in spaces for funders to hear directly from grassroots groups:* Grassroots groups need a sit-down with funders to have a deeper discussion about the challenges and opportunities that the non-big brand environmental and community-based groups experience trying to access funding.
- *Provide multi-year funding for grassroots groups:* Achieving different (equitable) outcomes will require different inputs than the model funders have used in the past. If funders are going to do this work the right way, they must fund the people who know how to do the work and who have credibility, not the big-brand groups. Provide larger, multi-year funding that enables groups to do the work that communities know they need to do to impact the environmental/quality-of-life issues they have prioritized.
- *Fund community-trusted, proven grassroots leaders and organizations directly:* These leaders should not have to go through a grant mechanism when applying for \$5-10K; provide multi-year funding for outreach, education, and staff. This will increase efficiency for these organizations.
- *Support capacity building and mentoring:* Set-up a mentoring program between larger environmental groups to help smaller environmental/EJ groups grow their capacity. (Some participants disagreed with this approach since it's easy to be taken advantage of.)
- *Streamline and standardize across funders:* Streamline and standardize grant application and reporting requirements to make it more accessible to more community-based/grassroots groups.
- *Fund three levels of capacity needs:*
  - *Individual organization capacity* (e.g. training, educational awareness, helping these institutions get up to speed in areas where they do not have expertise)
  - *Institutional capacity* (e.g., provide funding for staff development and general operating support, not just for activities; to be efficient these organizations need to have resources; sometimes they are not efficient because it's just one individual – applying every year and doing the bean counting and doing the work)
  - *Programmatic capacity* (e.g., offer multi-year funding for programs as opposed to funding isolated activities; this will increase the impact of the funding)
- *Develop new, relevant metrics for success:* Established metrics for programmatic success often undercounts successful public education, advocacy and community organizing. Funders don't appear to generally value organizing and community mobilization.
- *Define "partnership" from a DEI standpoint:* Consider how funders can begin to directly compensate local leaders and local expertise that is often extracted by big brand groups but goes undervalued when local

groups apply for funding directly. Value community knowledge and expertise. Figure out a way to financially support those who are working to create transformation at the most local level (e.g., by requiring MOAs that explicitly document an agreement regarding what resources will go directly to fund local expertise).

- *Ensure diversity and inclusion in decision-making processes:* Create a process for greater transparency and diverse representation in decision-making.

### Looking Ahead

The DEI Readiness Assessment included a tremendous amount of information gathering through surveys and discussions. The assessment findings provide valuable information on the general status of DEI within funders and organizations working on environmental issues. The remainder of this guide outlines detailed recommendations and strategies for organizations working on watershed issues, funders, and watershed networks to address these findings.

## Chapter 3: Advancing DEIJ Outcomes within Organizations

Chapter 3 of the DEIJ Guide is recommended for all organizations using this guide. It offers significant detail on how to institutionalize DEIJ within your organizational culture.

This chapter focuses on the “inner work” necessary for organizations to achieve their DEIJ goals. As each organization commits or re-commits to taking action on DEIJ as an integral part of their environmental and grantmaking work, they may also consider what is needed to achieve transformative and meaningful outcomes beyond the administrative policies and metrics and grapple with the meaning of DEIJ within their own organization. This includes:

- Understanding the existence of a significant gap between intention and outcomes in DEIJ in the Chesapeake Bay Watershed Region.
- Committing to pursuing transformational, lasting change on DEIJ issues by “doing the internal work” first (or at least simultaneously) instead of jumping ahead to start with the environmental work or the grantmaking work.
- Being willing and able to grapple with tough topics that your organization may not normally discuss directly, such as the historical and present-day context and causes of current disparities (e.g., race, class, geography) and the formative impact of power and privilege on different types of organizations operating in the environmental sphere.
- Working to reduce barriers to resources and opportunities for those who have had less access.
- Fostering, valuing and amplifying diverse and traditionally less prominent perspectives within the organization and with external audiences.

DEIJ work can be deeply personal and transformative and push you and your colleagues to examine and re-consider deeply held beliefs or institutional practices that have heretofore been taken for granted. The growing pains that come with this work must be navigated with respect, determination, and a clear focus on achieving the end goal – a healthy Chesapeake Bay Watershed and a healthy and just Chesapeake Bay Watershed Region.

Focusing first on the internal organizational work lays a solid foundation to support the external DEIJ watershed outcomes. The internal work is both administrative in terms of setting policies and metrics, and cultural, in terms of doing the work to embrace DEIJ as a core value across the organization. By starting with an emphasis on the inner work, you afford your staff, board, volunteers, and donors the opportunity to examine their individual and collective assumptions and expectations about DEIJ and build a shared understanding about how DEIJ can infuse both the internal culture of your organization as well as the important mission-related work you do together.

### Recommendation 1: Institutionalize DEIJ within your organizational culture.

#### A. Form a DEIJ committee or task an existing decision-making body with responsibility for setting and implementing DEIJ goals and strategies.

- **Ensure the committee has authority from the board or president/director to pursue specific tasks:** Develop a specific scope of tasks for the committee to pursue, including examination of traditional organizational process, policy and culture, and set up regular check-ins to report findings and recommendations to the board or president/director to ensure accountability and an organizational commitment to implementation.

Many organizations may find that they enter DEIJ work with leadership (board and/or executive leadership) that is representative of traditional power and privilege structures. If this is the case, consider how leadership can step away from some decisions and empower the committee to suggest a direction for the organization for achieving DEIJ goals.

- **Ensure the committee has the resources needed for success:** Without resources, the committee's work and outcomes will be limited. Resources could include: adding line items in the organizational budget to direct financial resources to this committee for trainings and other capacity building needs, ensuring equitable pay or rebalancing of work responsibilities for members of the committee (to carry out this additional work), and dedicated funds to bring in a consultant if needed.
- **Ensure diverse representation on the committee:** Analysis of the DEIJ Survey results revealed that junior staff often have different perspectives on DEIJ than senior staff and board members. A DEIJ committee (or any significant decision-making body) may benefit from representation from junior staff in addition to senior staff and board members.

Additional types of diversity that may be important to consider on your committee include: racial and ethnic diversity, age, gender, position within the organization, and professional expertise. For larger organizations or organizations with more than one location, geography could also be considered to ensure input from different offices.

When seeking participation from groups who are typically underrepresented in decision-making, such as people of color, do not assume that individual staff or board members from those groups will automatically want to serve on this committee. Recognize that these individuals may often be asked to serve in similar capacities related to diversity, and be respectful of the level at which they feel capable of participating at this time.

- **Consider internal vs. external representation on the DEIJ committee or on a Community Advisory Committee:** Some organizations may wish to develop a DEIJ committee composed primarily or entirely of representation from within the organization. Others may wish to include perspectives from outside the organization (e.g., from communities served, partner organizations, volunteers, funders). Those who wish to keep their DEIJ committee as an internal body could consider establishing a community advisory committee of experts from different backgrounds who could help organizations carry out their mission in geographic areas or with populations they wish to better serve.

When seeking participation from representatives outside your organization, be respectful of the time commitment and contributions you are hoping to gain from their participation and provide equitable compensation. When determining equitable compensation rates, consider the living wage (currently considered \$15/hour nationally) as a starting point; however, be aware of your local context. Appropriate compensation will vary significantly based on cost of living and other factors.

Creating a venue for external advisors can empower frontline community leaders, who are heavily invested in environmental justice issues, to become more invested in partnering on watershed and environmental restoration issues. This approach can help build a pipeline of leaders who are connected to your organization and to the resources and environmental benefits in which your organization is investing. It can also demonstrate that environmental organizations are supportive of leaders in spaces outside of their typical scope.

- **Ensure inclusion of diverse perspectives in DEIJ thought leadership and decision-making:** Increasing the diversity of a committee does not automatically ensure that all perspectives are weighed equally in developing thought leadership and making decisions. Aim to develop a culture of inclusion that embraces the questions and insights raised by participants who might not typically be included in thought leadership and decision-making settings at your organization.

- **Ensure the committee is working at the center, not the margin:** The committee will be able to make the most progress by focusing on the heart of the organizational work in addition to developing administrative policies and metrics, such as aligning your organization’s mission with DEIJ as described in the next recommendation. The committee could play a central role in development of a strategic plan or other long-range planning for your organization. Consider empowering the committee to bring specific recommendations to the board.
- **Invest in relationships and team-building:** The DEIJ committee (and the Community Advisory Committee) will be tackling exciting, but often challenging, discussions. Encourage members of these committees to get to know each other well, work to build trust and learn to value each other’s experience and intentions. Taking time during committee meetings to connect through team building exercises and over meals can be a valuable way to build rapport and effectiveness of the committee over the long-term. Refer to Recommendations 1C and 2E for additional trust-building strategies that may apply.

### Resources for Promoting Inclusion

The resources below offer some guidance on increasing inclusion within your organization.

- [Guidelines for Respectful Discussion](#) (GLSEN): These guidelines can be used as a starting point for ground rules that promote inclusive and respectful discussions.
- [The Diversity and Inclusion Revolution: Eight Powerful Truths](#) (Bourke & Dillon, 2018, Deloitte Review, issue 22): This article describes the amplified benefits of building a workplace culture of diversity and inclusion.
- [Examining Successful and Failed Collaborations for Lessons in Addressing Power Imbalance](#) (The Intersector Project, 2015): This article describes how to infuse a culture of diversity and inclusion into the cross-sector partnerships your organization is engaged in.

### Case Study: Healing Our Waters — The Great Lakes Coalition Equity Advisory and Action Committee

The Healing Our Waters-Great Lakes Coalition has formed an Equity Advisory and Action Committee. This committee “advises the governance board on equity initiatives, provides guidance to staff on strategic development, and serves as a resource for member organizations to advance equity goals. Members of the committee help select content for the annual Great Lakes Restoration Conference and partner with state leaders to find messengers with compelling stories to share with members of congress.”

For more information: <http://healthylakes.org/equity-committee/>

## B. Integrate DEIJ into the organizational mission.

- **Evaluate and articulate the connection between DEIJ and your organization’s mission and vision:** To embed DEIJ into the fabric of an organization, identify and understand the connection between DEIJ and your specific mission/vision. DEIJ strategic plans and investments aligned with the vision and born out of the need to advance the mission will be more effective in driving transformational organizational change. Similar to sustainability, DEIJ work is an *add in* to an organization not an *add on and thus needs to be woven into the fabric of day-to-day practices and documents.*

For some organizations, there may be a natural fit and alignment, but for many organizations this action step may be a heavy lift. If some colleagues struggle to connect DEIJ values with success as an organization, then more facilitated dialogue and training may be helpful, as described in Recommendation 3.

It is ok for this step to be a cyclical process and to recognize points of growth. For example, your organization may have adopted diversity on an administrative level, but just be starting to explore inclusion, equity, and justice as an organizational value. Addressing the connection between DEIJ and your mission, is

an opportunity to look at each component of DEIJ separately and consider how it relates to what you do. This allows your organization to develop a DEIJ lens for that work.

- **Acknowledge your organization’s history, but don’t let it inhibit your future:** In addition to evaluating your organization’s mission and vision, it is critical to understand and acknowledge the history of your organization and its relationship to DEIJ. A frank examination and recognition of strengths, weaknesses and other defining characteristics can help your board and staff develop a shared understanding of what factors have contributed to your DEIJ successes and challenges to date. These conversations can also lead to expanded possibilities for advancing DEIJ moving forward.

Given the history of race-based discrimination and exclusion in the United States generally and, as a byproduct, within the environmental movement specifically, this effort may be most productive with an external facilitator with expertise in DEI and environmental justice to help launch and navigate an often-challenging set of discussions.

- **Adopt a revised mission or policy statement on DEIJ:** Identify how DEIJ could be more directly integrated into your organization's mission and vision. Some organizations may decide to develop a DEIJ statement that formally articulates the connection between the existing mission/vision and DEIJ. Other organizations may decide to revise their mission to explicitly address DEIJ as an integral part the work.

When a firm commitment to advancing DEIJ is clearly articulated, this provides clarity for your organization which will then be better positioned to commit staff time and financial resources towards implementation. Additionally, keep in mind that a DEIJ statement can be refined over time in order to respond to changing context, priorities, and organizational culture.

After adopting a revised mission or policy statement, your organization next needs to connect these statements to their organizational values and build a culture of trust that allows for shared learning around DEIJ, as well as a culture of accountability for those who do not align with these values. This is discussed further in Recommendation 1C.

### **Resources: Embedding DEIJ into a Mission Statement or Policy Statement**

Examples of a mission and policy statement that reflect DEIJ:

#### [Nathan Cummings Foundation](#) Mission Statement:

“The Nathan Cummings Foundation is a multigenerational family foundation, rooted in the Jewish tradition of social justice, working to create a more just, vibrant, sustainable, and democratic society. We partner with social movements, organizations and individuals who have creative and catalytic solutions to climate change and inequality.”

#### Excerpts from the [Sierra Club](#) DEI Statement and FAQ:

“This is just the beginning of a long journey for Sierra Club; by centering our key principles of equity, justice and inclusion in every aspect of our work, we aim to transform ourselves and build a healthy, welcoming and sustainable community that celebrates people from all walks of life.

Our commitment to equity, inclusion and justice will impact our partnerships by broadening them, rather than limiting them. This commitment is already driving us to think more deeply about who should be at the table when decisions are made, and to approach relationship building with environmental justice organizations and other partners from across issue areas with more intention and thoughtfulness. Sierra Club's vision for healthy, democratic, just and clean communities align us with a wide range of organizations, issues and leaders. As we deepen our investments in this work, possibilities for solidarity and collaboration across issues and movements will continue to unfold. Sierra Club does and will continue to choose partnerships based on shared values, making sure not to partner with organizations that take positions on, for example, immigration, that do not reflect our organizational values. Sierra Club will also continue to partner with traditional conservation organizations and other folks with whom we have long-established relationships.”

### C. Build a culture and an atmosphere of trust, and develop a shared language for discussing DEIJ.

- **Invest in developing a shared language about DEIJ that helps people talk with each other effectively:** When DEIJ has not been an integral part of an organization's culture, staff and board members may find themselves struggling to articulate their thoughts and ideas in terms that everyone can understand.

It may be valuable to develop a "living glossary" that defines key terms in your organization's approach to DEIJ. Framing these definitions as a "living glossary" acknowledges that definitions change and grow over time as the people using them change and grow and can allow your organization flexibility to continue learning and refining your shared language as the work continues.

Starting with existing definitions is an important baseline that still allows your organization to identify how the definitions apply to you. See the resources text box for some examples of similar tools other organizations have created. For example, your organization may adopt a common definition of diversity (such as the one used in this guide) while also defining what diversity means in your own context. This contextual definition of diversity will feed into Recommendation 2B – setting metrics for diversity specific to your organizational needs. Hands-on training opportunities and working sessions facilitated by DEIJ experts can be helpful in establishing these definitions.

After the glossary has been created, make sure it is easy for staff, board, and volunteers to access. Include the glossary in orientation of new hires, and revisit it periodically as needed to ensure that definitions get updated as new learning occurs.

- **Understand the history and meaning of the environmental justice (EJ) movement and the principles of environmental justice:** Spend some time familiarizing yourself and your colleagues with the history of the environmental justice movement, which gained momentum alongside the mainstream environmental movement. Seek to understand why these two movements operated in different spheres, established completely different areas of focus, and developed a different language for defining and discussing environmental threats and opportunities.

Understanding the principles of environmental justice developed by more than four hundred EJ leaders at the 1991, First National People of Color Environmental Leadership Summit provides an essential foundation for developing inclusive, equitable, and just environmental partnerships with communities of color and underserved communities. Understanding the viewpoints, terminology and principles used by these experienced leaders will help your organization grow its capacity to understand, honor and support the leadership of these communities.

- **Visit sites and communities where environmental injustices have taken place in your area:** Take time to visit, listen and meet with community leaders in neighborhoods or areas that have experienced disproportionately high environmental impacts. In years past, environmental justice groups led "Toxic Tours" to help those unfamiliar with environmental conditions in Environmental Justice, Tribal and low-income communities gain a first-hand view of their daily lived experience. These tours or site visits have been major educational tools to teach that which even the most passionate narration and powerful case studies could not adequately communicate. This is a perfect opportunity for relationship building, experiential learning, breaking down of silos, and visualizing what inequity and injustice look like. It is common practice to compensate tour leaders or make a donation to the group/organization leading the tour. Their time is valuable, too.
- **Create a safe space and take time to talk about and understand DEIJ collectively:** Convene facilitated discussions on both the organization's internal DEIJ culture and DEIJ in your external environmental work. If possible, consider using a neutral facilitator and establish ground rules to allow everyone within your organization to fully participate. (See the resource text box earlier in this chapter for sample ground rules.) Facilitated discussions might focus on the dual goals of (1) understanding the range of perspectives on DEIJ



within your organization and (2) raising your collective understanding and comfort level with talking about DEIJ with each other going forward.

Consider that the experience of junior staff may be different than the experience of senior staff at your organization, as indicated by the outcomes of the DEIJ Readiness Assessment described in Chapter 2. Providing a space for junior staff to talk about DEIJ issues without senior staff present can help ensure that power dynamics do not stifle communication and innovation.

In addition, recognize that not everyone will be happy about undertaking these discussions about DEIJ. Create an atmosphere where staff and board members can express their misgivings without fear of being judged. When approached with sensitivity, these in-person discussions can inform and open the door to ongoing DEIJ efforts.

- **Create multiple feedback mechanisms to increase comfort:** Talking about DEIJ can be exciting. It can also be difficult, as people share diverse experiences, opinions, misgivings, concerns ideas and priorities. For example, as mentioned above, junior staff may not always feel comfortable expressing their opinions in the presence of senior staff.

Provide an atmosphere where multiple feedback mechanisms exist for staff to share their thoughts, experiences, and ideas for identifying DEIJ challenges and advancing DEIJ outcomes. In-person conversations could be very difficult and off-putting for some, and people need to have a safe space to be able to say if they are uncomfortable with advancing DEIJ in organizations where this has not been identified as a priority heretofore. Other people may be on board with advancing DEIJ but still need outlets other than in person discussions to collect and share their thoughts effectively. Additionally, in larger organizations, implementing more than one feedback mechanism can ensure that staff feel heard via a tool that best fits their style.

Common feedback mechanisms for staff and board could include:

- ✓ Facilitated discussions
- ✓ DEIJ trainings
- ✓ Lunch speakers or webinars that dive into a particular topic on DEIJ and internal culture and include time for staff debrief and discussion about how that topic applies within your organization.
- ✓ Surveys and written feedback opportunities
- ✓ Workplan evaluations
- ✓ Staff evaluations and staff development
- ✓ Anonymous feedback loops

#### Sample Living Glossaries

- [Power Moves Glossary](#) (National Committee for Responsive Philanthropy)
- [Diversity Toolkit: Building Principles of Diversity, Equity, Inclusion, and Justice in Organizations](#), pages 4-5 (Choose Clean Water Coalition, May 2018)
- [Glossary of Bias Terms](#) (Center for Diversity and Inclusion, Washington University in St. Louis, 2019)
- [Diversity Glossary](#) (Yale School of Forestry and Environmental Studies)

## Environmental Justice

- [Principles of Environmental Justice](#) (First National People of Color Environmental Leadership Summit, 1991)
- [Proceedings of the First National People of Color Environmental Leadership Summit](#) (United Church of Christ Commission for Racial Justice, 1992)
- [Environmental Advocacy: Working for Economic and Environmental Justice](#) (Bryant, Bunyan, PhD, Ann Arbor, MI, 2002)
- [The Road to Executive Order 12898 on Environmental Justice](#) (U.S. EPA, 2014)
- [A Brief History of Environmental Justice](#), video (ProPublica, 2019)
- [The History of Environmental Justice in Five Minutes](#) (Palmer, Natural Resources Defense Council, 2016)
- [Draft Environmental Justice Primer for Ports: The Good Neighbor Guide to Building Partnerships and Social Equity with Communities](#), pages 4-5 and 36-37 (U.S. EPA Office of Transportation and Air Quality, 2016)

## D. Develop a DEIJ Action Plan or Strategic Plan.

- **Conduct a readiness assessment of your organization's internal DEIJ culture and DEIJ in your external environmental work:** An assessment provides a baseline understanding of how your organization is performing on DEIJ and the varied understandings and perspectives staff, board and volunteers have regarding DEIJ. A readiness assessment could incorporate a number of elements depending on time, resources, organizational culture, and the number of people you wish to engage. It could include:
  - ✓ DEIJ Survey of board and staff
  - ✓ Facilitated discussions with board and staff (see also considerations outlined in Recommendation 1C)
  - ✓ One-on-one interviews with board or staff
  - ✓ Solicitation of feedback from volunteers, clients, grantees, and partners

For a sample assessment, see Appendix 2.

- **Recognize your organization's specific barriers and opportunities relative to DEIJ:** Evaluate the outcomes of the readiness assessment to understand the specific barriers and opportunities of your organization. Indeed, some of these barriers and opportunities may be directly related to your organizational history, as well as your location within the watershed, etc. Developing shared understanding and agreement between board and staff on these issues provides a solid foundation before moving on to set DEIJ goals.
- **Develop specific overall DEIJ goals:** The DEIJ goals developed by your organization can be informed by best practices, respond to the challenges and opportunities your organization faces relative to DEIJ, and advance your organization's mission and vision. Consider how your DEIJ goals address the following outcomes:
  - ✓ Diversifying the organization (staff, board, volunteers, contractors, etc.),
  - ✓ Shifting the internal culture of the organization,
  - ✓ Partnering directly with leadership from underserved and diverse communities, and
  - ✓ Ensuring the environmental work you do benefits underserved and diverse communities.

A sample framework for DEIJ goals is provided in the resources box below. This framework was developed based on national best practices and is intended to be tailored to fit the specifics of your organization and your desired DEIJ outcomes.

### Resources for Developing DEIJ Goals, a DEIJ Action Plan or a DEIJ Strategic Plan

Refer to Appendix 6 for a sample DEI Audit Framework that could be used as a template for developing a framework for DEIJ goals for your organization. As you tailor this framework to fit your organization's needs and develop goals for each part of the framework, consider the following:

- Depth vs. breadth of impact in your goals – for example, some organizations may wish to set broad goals for increasing diversity across the board, while others may choose an approach that is more tailored to specific considerations.
- Identify both incentives and accountability measures for each of the goals and set up a review cycle for measuring progress.
- Define roles and responsibilities for each goal. You may also wish to include a summary of each department and/or role to show that each piece of the organization has a part to play in advancing DEIJ within the organization.
- Determine how to best capture these goals for maximum impact. Some organizations may find it helpful to capture these goals in a single document – a DEIJ Action Plan. Other organizations may find it most effective to incorporate these goals directly into an existing strategic plan or into workplans for projects and/or staff. To maximize learning about DEIJ, consider developing a standalone DEIJ action plan or strategic plan to gain a deeper understanding of what DEIJ means to your organization, and then weave the key recommendations into the larger organizational Strategic Plan during the next scheduled update of that document.

### E. Include DEIJ initiatives in your budget, staffing, and fundraising strategies.

- **Budget:** Incorporate DEIJ actions and strategies, especially those included in your DEIJ Action Plan (Recommendation 1D) explicitly in your organization's budget. The budget is a document that reflects your organization's priorities, so including actions like DEIJ training as a separate line item and expanding budgets for existing programs that are being modified to include DEIJ actions will ensure there are resources to attain the adopted goals.
- **Staffing:** Staffing for DEIJ could include:
  - ✓ Consider writing DEIJ into all job descriptions across the organization. This allows DEIJ measures to be included in staff annual performance reviews.
  - ✓ Consider hiring DEIJ-focused staff as your body of DEIJ-focused work expands. Depending on the size of your organization and where you are in the process, the DEIJ position could be scoped as a coordinator, manager, or director.
- **Fundraising:** Fundraising for DEIJ specifically can be challenging. When thinking about how to support your organization's DEIJ work, consider these general tips:
  - ✓ To show your commitment to DEIJ as a priority, find ways to direct existing funds toward the work before reaching out to donors for additional support.
  - ✓ Engage existing donors who have signaled an emphasis on DEIJ. (Note: Seek to understand how DEIJ may be impacting their grantmaking. For example, some may be very interested in providing additional support for DEIJ work with existing grantees while others may be looking to shift support to environmental justice efforts.)
  - ✓ For existing donors who have not explicitly prioritized DEIJ, reach out to understand what areas of DEIJ support they might consider funding. Look for ways to influence current funders to advance or prioritize DEIJ.

- ✓ Expand your horizon! There are many foundations and donors advancing social justice and equity who could be valuable partners in your journey. Reach out to them as well!

## Recommendation 2: Increase diversity among board and staff.

### A. Research DEIJ organizational barriers, opportunities, and best practices on diversity in the environmental field.

- **Learn from existing research:** Recent academic research has focused on identifying the state of diversity in the environmental field, barriers to increasing diversity, and effective strategies for overcoming these barriers. Review the resources identified below and discuss key findings from these reports with your board and staff.
- **Learn from personal experiences of your staff and board:** Ask current staff and board members about their experiences with diversity and inclusion within your organization to help identify what your organization already does well, barriers to increasing diversity, and opportunities for improvement. Depending on your context and goals, you might choose to conduct an anonymous survey to promote honest feedback or you might prefer to facilitate an in-person discussion to provide an opportunity for participants to learn from each other's experiences.
- **Get specific about barriers and opportunities:** Based on what you have learned, name specific barriers your organization is facing as well as specific opportunities to address them.

#### Resources for Understanding the Green Ceiling

Common barriers to increasing diversity at environmental organizations can include an organizational culture of exclusion, lack of competitive compensation, few opportunities for advancement, and lack of DEIJ messaging and initiatives. In their seminal 2014 report, Green 2.0 found that the percentage of people of color working in environmental organizations is disproportionately lower than that of the U.S. population. Despite making up 36% of the population, the diversity composition of environmental organizations has not broken the 16% "green ceiling."

To better understand the current state of diversity in environmental organizations and explore strategies for overcoming some of the hurdles to increasing diversity, explore the resources available from Green 2.0:

- [Green 2.0 website](#)
- [The Green Insiders Club](#) handout
- [The State of Diversity in Environmental Organizations: Mainstream NGOs, Foundations & Government](#)

### B. Set goals for increasing the diversity of your organization.

- **Identify specific goals and priorities:** Refer back to your organization's newly developed definition for "diversity" established under Recommendation 1. Based on that definition, identify specific goals and priorities for increasing representation of underrepresented groups.

Consider that while there is value to many kinds of diversity, you may find there are specific underrepresented groups that your organization would benefit from focusing on initially. For example, if your organization is also working on developing equitable partnerships with a particular community, you may wish to increase representation from that community on your board or staff. In other cases, it may be beneficial to set goals related to the percent persons of color or percent women represented on your board or staff. Select the goals that make sense for you and will strengthen your organization the most now.

- **Be accountable using incentives, accountability measures and a review cycle:** Identify both incentives and accountability measures as relevant for each of your diversity goals. Define roles and responsibilities for achieving these goals and set up a review cycle for measuring progress (perhaps annually).

### C. Create a pipeline of candidates.

- **Invest in long-term pipeline development for the environmental field:** Invest in training or internship programs that grow the skills of young people from underrepresented groups who are interested in a career in the environmental field. For example, developing a partnership with different kinds of groups and with Historically Black Colleges and Universities (HBCUs) (e.g. Bowie State, Cheyney State, Delaware State, Howard Univ., Morgan State, UMES) with environmental programs or interests can help institutionalize new pipelines for these students to gain experience in their field of choice and build connections that can lead to jobs after graduation.

To move this forward effectively, your organization may need to develop a written strategy for pipeline development that includes consideration of a process for identifying candidates, diversity/staffing goals, funding for the positions, staff time dedicated to managing the recruitment, application and hiring processes, and staff time dedicated to supervising and investing in the trainees once hired.

- **When possible, hire homegrown talent:** Prioritize selection of your training or internship graduates for staff or board positions at your organization.
- **Build relationships with other organizations working on DEIJ issues and the environment:** This can help create a pipeline of candidates for diversifying your board.

#### **Case Study: Chesapeake Conservation Corps**

Through the Chesapeake Conservation Corps program, which was created by the Maryland Legislature in 2010, the Chesapeake Bay Trust connects young adults (ages 18-25) to a paid, one-year term of service at environmental non-profits or government agencies in the Chesapeake Bay region. In recognition of underrepresented populations in environmentally focused careers, the Chesapeake Bay Trust hires organizations that have strong connections in historically marginalized communities to facilitate admission of people of color to the Corps program. All participants gain environmental and leadership experience and prepare for a future in green careers.

Considerations for building a sustainable pipeline through this kind of program should include:

- ✓ Living wage during employment with the program.
- ✓ Intentional recruiting from the program.
- ✓ Tracking applicants who were not accepted into the program and connecting them with other environmental organizations looking for job candidates.
- ✓ Broadly advertising this program through ethnic media, with career offices at Minority Serving Institutions, and with groups working in EJ communities.

For more information: [Chesapeake Conservation Corps](#)

### **Case Study: RAY Fellowship Program**

The Roger Airliner Young (RAY) Conservation Diversity Fellowship Program seeks to connect young leaders of color to career pathways in the conservation field. This program, managed by the Environmental Leadership Program, matches recent college graduates with member organizations for a year-long competitively paid fellowship. Fellows gain work experience in their field of choice and are matched with mentors who can help the fellows build their professional networks.

Member organizations include: the Environmental Defense Fund, Environmental Leadership Program, Greenpeace, Natural Resources Defense Council, Ocean Conservancy, Oceana, Point Blue Conservation Science, and The Nature Conservancy. The partnership is open to new members.

For more information: [RAY Conservation Diversity Fellowship Program](#)

## **D. Expand your networking, advertising, and selection process.**

- **Network and advertise intentionally to attract diverse candidates:** You can increase the pool of diverse candidates using some simple techniques such as:
  - ✓ Cultivate relationships and advertise positions in venues that are likely to generate diverse candidates for staff and board positions. See the resources below for ideas about where to advertise.
  - ✓ Position your organization competitively to attract diverse candidates by describing your commitment to DEIJ and its relationship to your mission and values.
  - ✓ Describe how the job responsibilities relate to advancing DEIJ through environmental work.
  - ✓ Include the anticipated salary and benefits in the job description.
- **Understand and address implicit bias in the selection process:** Many hiring processes create an implicit bias toward replicating the organization as it currently is. For example, hiring people you know or hiring from schools and groups well known to you. To get different results, the process must be changed to address these unintentional forms of bias. See the resources below for additional information.

### **Resources for Finding Diverse Candidates**

A common misconception in the environmental field is that there are few qualified people of color in the hiring pool. In fact, it is more often the case that environmental organizations are not including language or information in job postings that will help attract diverse candidates and/or are not advertising in the best venues.

Local venues for advertising open positions include: local and regional job fairs, community colleges and Historically Black Colleges and Universities, affinity group organizations (e.g. DMV EJ Coalition listserv, young ethnic professionals organizations, community organizing networks).

A few examples of national resources for recruiting include: the NAACP Environmental and Climate Justice Program, the University of Michigan School for Environment and Sustainability's Diversity, Equity and Inclusion Initiative, and the Green Leadership Trust.

For additional resources on finding and hiring diverse candidates, see the Hiring section of the Choose Clean Water Coalition's [Diversity Toolkit](#) (pages 13-18).

### Resources for Addressing Implicit Bias in the Hiring Process

- Diversity Derailed: Limited Demand, Effort and Results in Environmental C Suite Searches (a report by Maya A. Beasley, PhD. For Green 2.0, 2018)
- [How Unconscious Bias Can Impact the Hiring Process](#) (Indeed, 2018)
- [How to Tackle Unconscious Bias in Hiring and Open the Door to Great Talent](#) (Indeed, 2018)
- [Addressing Implicit Bias in the Hiring Process](#) (Orem, 2018)

#### E. Create a culture of trust and responsiveness around DEIJ issues raised by staff.

- **Raise awareness about the significant challenges faced by underrepresented board and staff members:** Underrepresented candidates are not drawn to organizations that are lacking in diversity themselves. In the environmental sector, people have frequently experienced being the “one person of color at a time,” being tokenized, and have often experienced cultural hostility expressed as normal organizational culture. Even organizations that have committed to increasing diversity, may not have achieved a culture of equity and inclusion for new members.
- **Increasing diversity is only effective if new members feel comfortable and are encouraged to stay, flourish and advance:** It is not uncommon for organizations who have made a commitment to increase diversity to find that they then struggle to retain those staff over the long-term. If this is a challenge you are facing, consider whether your organizational culture may unintentionally be contributing to attrition and turnover. Strategies such as creating affinity groups and safe spaces for new staff to offer feedback can help address this challenge.
- **Creating a culture of trust and responsiveness takes internal work:** As described in Recommendation 1C, there are lots of ways to create a culture of trust and responsiveness around DEIJ. The important thing is to stick with it and demonstrate that feedback leads to action. Changing the internal culture of an organization is a long-term commitment that requires intentional cultivation of new habits and practices of inclusion, equity, and growth. Prepare the board and staff for expectations about the time this work takes and seek commitment to see the process through to benefit the organization over the long-term.

### Recommendation 3: Increase DEIJ capacity at all levels of the organization (e.g., board, senior management, staff, and volunteers).

#### A. Build the capacity of your board to understand and address DEIJ.

- **Identify your board’s capacity building needs and build their comfort with discussing DEIJ issues:** You may already have a good sense of the range of perspectives and comfort levels your board members bring to discussions of DEIJ. Or you may need to spend some time assessing their readiness for DEIJ through a readiness assessment as described in Recommendation 1C and increasing their comfort level with discussing DEIJ freely as described in Recommendation 1B.

If you aren’t sure what your board members think or what needs they might have, don’t be afraid to ask. For boards who are new to DEIJ, a survey could be an effective, low-risk way to assess perspectives and needs. For boards who have been engaged in DEIJ work for some time, an in-person conversation to discuss and self-assess their own needs might be effective. Choose a strategy you think will work best for your board.

- **Conduct a demographic assessment of the board in order to increase diversity:** Refer to the diversity goals established under Recommendation 2B. Conduct a demographic assessment of the board to



understand your baseline, and move forward with increasing diversity according to your goals. (Consider conducting this in conjunction with the survey recommended above.)

- **Invest in building capacity and buy-in through relationship building with leaders in the field:** Progress in DEIJ will depend largely on your board's understanding and buy-in of DEIJ. One way to build this understanding and support is to identify opportunities for them to engage in the larger regional and national conversation about DEIJ in environmental funding and not-for-profit work. For example, the board could:
  - ✓ Attend the annual District of Columbia, Maryland, Virginia Environmental Justice Coalition (DMV EJ Coalition) conference sponsored by the University of Maryland School of Public Health to engage with regional environmental justice leaders directly.
  - ✓ Invite speakers (e.g., CCWC DEIJ Advisory Committee members, Green Leadership Trust members, funders actively advancing DEIJ, DMV EJ Coalition members) to board meetings. Some boards who are just starting down the DEIJ path may benefit from a speaker who can discuss the importance of DEIJ work and why it needs to be prioritized. Other boards may wish to identify a speaker who can help them dig deeper on a particular topic of interest such as developing effective DEIJ partnerships.
  - ✓ Participate in national conferences such as the White Privilege Conference or Facing Race to connect with national leaders addressing DEIJ issues in a variety of fields nationwide.
- **Commit to setting aside time on the board's agenda to engage proactively with DEIJ on a regular basis:** As you begin implementing DEIJ strategies, ensure that your board's agenda includes time for updates and discussion of these strategies and related DEIJ initiatives. Prioritizing time for this work signals the significance of DEIJ to achieving the mission and vision of the organization.
- **Consider who champions DEIJ on your board:** Some boards may wish to have a chair of DEIJ who is a part of the board and connects the board with the work of the DEIJ committee formed as part of Recommendation 1A. In other instances, depending on how the DEIJ committee is composed and structured, other relationships between the board and the committee may make sense.
- **Manage board transitions with an emphasis on building and/or transferring knowledge of DEIJ:** As your board grows, ensure that DEIJ considerations are a part of transitions. These transitions may be opportunities for strategically expanding your board's diversity, seeking out members with DEIJ skills or perspectives not yet represented, and/or passing leadership and responsibility for DEIJ initiatives between board members. Carefully steward the investments you have made in expanding the DEIJ capacity of your board during these transitions to ensure continuity of institutional knowledge and growth in new opportunity areas. To assist with this continuity, make DEIJ a part of the on-boarding process.

## **B. Build relationships with and highlight organizations that do DEIJ well.**

- **Build your network at the staff and/or board levels:** Identify key DEIJ practitioners (organizations or individuals) you would like to learn from and prioritize the necessary time and/or resources for engaging with them. In some instances, this may look like one-on-one relationship building; in other instances, you may wish to formally invite them to come and engage with a group at your organization.

Ask them what they have done that works well and how have they overcome challenges. Share where you are stuck and ask for feedback. Examine the models they have used and determine how those models could be adapted to your own organization's needs.
- **Provide just compensation:** Remember that it is respectful to provide compensation to DEIJ practitioners when you are asking for a significant amount of their time and expertise. Many practitioners coming from underserved communities and communities of color are often overlooked as speakers or experts in the field.



Providing just compensation by budgeting resources to pay DEIJ speakers affirms your organization's commitment to equity and justice.

- **Help raise the profile of organizations and models that are working well:** In addition to building your own organization's network, ensure you are looking for opportunities to lift up the practitioners you are learning from. Nominate them for awards, speaking opportunities at conferences, inclusion on national and regional lists of practitioners, etc.
- **Support your own partner organizations in growing in DEIJ:** As you gain more knowledge and expertise, encourage your organization's partners to look for ways to incorporate DEIJ in your joint projects and in their own organizations. Pay it forward by passing on what you have learned to others and building momentum for DEIJ in your existing networks.

### Resources for Relationship Building

The following shortlist of national environmental organizations and funders are working to advance DEIJ. Connecting with staff at these organizations is a great way to build your network of DEIJ practitioners.

- California Endowment's [DEI in Investing Activities](#) report and [4<sup>th</sup> DEI Audit](#)
- Clean Water Action's Diversity Workgroup
- [Green Leadership Trust](#)
- [Nathan Cummings Foundation's Climate and Inequality Initiative](#)
- [Sierra Club's Equity, Justice and Inclusion Initiative](#)

## C. Invest regularly in DEIJ training, capacity building support and resource needs.

- **Assess DEIJ training and resource needs annually to inform budgeting:** Engage diverse perspectives within your organization to assess training needs, especially across ages and positions within the organization (e.g., junior staff, senior staff, and board). Assess training needs annually in alignment with the budget cycle. The organizational readiness assessment in Recommendation 1D may provide a good first opportunity for assessing training needs (to eliminate assessment fatigue), or the training needs assessment could take place separately as appropriate.

Training priorities may include:

- ✓ individual professional development opportunities,
- ✓ purchasing resources that advance DEIJ for specific programs or initiatives,
- ✓ collective DEIJ training opportunities.

Invest in training and growth of your organization as an ongoing commitment. Depending on your initial assessment of training needs, you may find that most of your staff or board would benefit from a collective 101 training and then overtime increase the depth and breadth of training so that staff and board members are growing into 201 and 301 conversations.

- **Utilize collective training to create shared understanding:** Investing in group training can be a wonderful venue for generating shared understanding between board and staff (or between older and younger employees and board members). Requiring or incentivizing attendance at group trainings can provide opportunities for relationship building between board and staff, bonding between colleagues who do not often get to work together, and development of shared understanding across multiple perspectives within the organization. This in turn can develop the trust and momentum needed among staff and board to really move DEIJ initiatives forward sustainably over the long-term.

Examples may include:

- ✓ Webinars

- ✓ In-person group trainings
- ✓ On-boarding for staff and board members.

### **Common DEIJ Training Needs**

Awareness building and skills building needs for board, staff and volunteers mentioned during the roundtable discussions and in other feedback include:

- Tools for overcoming fear and anxiety with this work.
- Cultural competence training. What awareness and skills do staff need to operate in a culturally competent manner when building relationships across a culturally diverse landscape?
- Cultural humility training. What posture and tools can an individual and an organization adopt to advance partnership building with communities of color and underserved communities? How can a posture of “cultural humility” be institutionalized effectively?
- Community engagement training. How do you effectively engage rural populations vs. urban/suburban populations? How do you engage underserved/underrepresented populations within your organization including the spectrum from volunteer to leadership roles?
- Strategies for effective partnerships between funders and communities of color / underserved communities about how grantmaking can shift based on the needs of diverse communities and how to remain aligned with grant requirements while being flexible enough to meet these needs?
- Funding DEIJ work on policy or social justice topics without triggering “advocacy” 501(c)3 limitations.

## Chapter 4: Advancing DEIJ Outcomes in Environmental Work

Chapter 4 of the DEIJ Guide is recommended for all organizations working to restore clean water in the Chesapeake Bay Watershed. This includes foundations, as this chapter offers significant detail on how your grantees can conduct environmental work with a DEIJ lens.

This chapter focuses on strategies for organizations to achieve their DEIJ goals through their mission-related environmental work. Many organizations engaged with DEIJ may find that they are already engaged in one or more of these types of initiatives. In this chapter, more-so than Chapter 3, the recommendations are organized in a loose sequential order to help readers think through the process of building equitable, long-lasting relationships and partnerships that advance DEIJ. However, as with any relationship building process, this work tends to be cyclical and may not follow a prescribed order. Approach the recommendations in this chapter with the goal of organically growing and strengthening existing DEIJ efforts in your environmental work and tackling new initiatives as your organization has capacity. It is best to start small and do a few things well to gain momentum.

### Recommendation 1: Build long-term relationships with underrepresented communities to address community identified needs.

#### A. Identify underrepresented groups in your service area, understand local context, and evaluate the impact of your current outreach and engagement outcomes.

- **Map the story of your watershed or service area:** Develop a map or series of maps that help tell the story of your watershed, its history, communities, and your environmental work. Looking at aggregated environmental and social data can lead to new insights about the impact of your work and opportunities for expanding outreach and partnerships.

Maps could include:

- ✓ Watershed boundaries,
- ✓ The history of the watershed as the life force of the many Indigenous peoples who once flourished in this region.
- ✓ The historical role the Chesapeake Bay Watershed (it's rivers, streams, creeks, and tributaries) played as a functional component of the Underground Railroad assisting those escaping the institution of slavery.
- ✓ The historical and present-day role of the watershed's fisheries and other natural resources as an economic engine for the region.
- ✓ Present-day demographics such as income, race/ethnicity, vulnerable populations such as children and seniors,
- ✓ Present-day land use, environmental conditions, and health outcomes,
- ✓ Locations of past or present-day environmental justice issues, and
- ✓ Locations of your organization's outreach, partnerships, projects, and investments.

In addition to mapping locations of your environmental work, it may also be helpful to analyze or map the demographics reached by each initiative, since site-based initiatives such as education in public schools sometimes serve populations that look different than the immediately surrounding community.

It is important to consider two related factors when beginning to map the story of your watershed:

1. Communities of color, Indigenous and low-income communities should not be responsible for educating outside organizations – these organizations need to put in the time and effort to gather publicly available information and better understand the story of their watershed, including the environmental justice issues faced by communities of color and low-income communities.
2. Outside organizations need to respect and honor the knowledge and lived experiences of communities of color, Indigenous and low-income communities, and the way they tell their own stories. Provide an opportunity for underrepresented communities to share their own stories and history. Learning the stories and history (e.g. Blacks of the Chesapeake) known to underrepresented and underserved communities is foundational to relationship building and provides a much deeper understanding of community experiences not captured in publicly available data or histories. See Recommendation 1C for further discussion.

In other words, do the work you can to educate your organization up front, and then seek opportunities to listen and learn from underserved communities.

- **Identify who you are not yet reaching effectively:** As you look at the maps and demographic information you have collected, do the environmental benefits your organization seeks to implement appear distributed equitably across all groups in the watershed? If there are inequities in impact, consider how this might influence your priorities for future work.
- **Learn the history of the community(ies) you are interested in reaching:** As you identify communities that you do not have a relationship with or that you currently serve but do not have true partnerships with, make an effort to learn more about the history of those communities. This might include understanding land use legacy, past and present environmental conditions, and the impacts of housing segregation policies, learning about points of pride and success in the community, and getting to know what community institutions (past and present) have provided critical community leadership.
- **Understand how current policies and programs impact the community(ies) you are interested in reaching:** Present day policies and programs often continue to disproportionately impact communities of color and low-income communities. Familiarize your organization with current environmental impacts on these communities.

## Mapping Resources

### *Online Data and Mapping Tools:*

- [U.S. Census Interactive Mapping Tools](#) (U.S. Census Bureau)
- [Environmental Justice Screening and Mapping Tool](#) (U.S. EPA)

### *Local Data Mapping Resources*

- Local, regional and state planning agencies
- Health departments and hospitals
- Local residents who can share lived experiences of environmental, health and land use conditions, etc.

### *Mapping and Storytelling Examples:*

- [Black Heroes of the Bay](#) (Chesapeake Bay Foundation, 2018)
- [Blacks of the Chesapeake](#) (Vince Leggett)
- [Harriet Tubman Underground Railroad National Historic Park](#) (National Park Service)
- [Reclaiming the Edge: Urban Waterways and Civic Engagement](#) (Smithsonian Anacostia Community Museum, 2012)

**Case Study: Incorporating Equity into Environmental Policy and Initiatives**

The report [Planning for Climate and Energy Equity in Maryland](#) (Skeo, 2015) demonstrates how equity can be infused proactively into environmental policy. Developed for the Maryland Environmental Health Network and the Town Creek Foundation, this report identifies how the same policies that seek to reduce carbon emissions in the State of Maryland by the mandated 40 percent before 2030 could also address the disproportionate impacts of climate change on Maryland's most vulnerable communities. The report provides a model for capturing equity recommendations as well as an equity review of Maryland's 2013 Greenhouse Gas Reduction Act Plan.

**Resource: Community Engagement Best Practices**

The Partners for Places grant program, managed by the Funders Network for Smart Growth and Livable Communities, offers guidance on best practices for community engagement in their [Proposal and Award Guidance](#).

**B. Evaluate your own capacity for relationship building with new constituencies and set goals.**

- **Identify and prioritize the communities where you would like to expand outreach:** Identification of these communities may be largely based on the mapping exercise above but could also include prioritization based on existing relationships, context-specific opportunities and the goal of equitable distribution of environmental benefits.
- **Evaluate your capacity:** Be honest with yourself about your organization's current capacity in terms of budget, staff time, existing relationships, training needs, etc. It is better to start small and be successful than to overextend your staff and create expectations in a target community that you cannot meet.
- **Set realistic goals focused on relationship building, and identify resources:** Set realistic goals for relationship building that could lead to expanded outreach and engagement, building a volunteer base, etc. Remember that building personal connections and trust with a new community takes a significant amount of time and face-to-face contact. Make sure that you are providing staff with the resources and support to achieve your goals and focus goal-setting on relationship building up front rather than on specific outreach and engagement targets or implementation of specific programs.

**C. Build long-term, personal relationships in the communities being served in a genuine way.**

- **Learn about community needs and priorities:** Take a learning posture as you enter a new community. This might include:
  - ✓ Spend time talking with community leaders about the community's needs and priorities. What is their vision for the advancement of their community goals?
  - ✓ Attend community meetings, events, and activities. What cultural differences do you notice from communities your organization has built relationships with in the past? How might your approach to relationship building evolve in response?
  - ✓ Understand how the community thinks about and talks about the natural and built environment. What terms and concepts do they use that are different from or similar to those used by your organization?
  - ✓ Connect these conversations back to the research you did in Recommendation 1A and check what you learned from your mapping analysis and historical research with community leaders – does the information you gathered match their lived experiences or are there gaps or nuances they can share with you?

- **Share about your organization’s mission/vision, initiatives, and resources:** As you invest in relationship building, share about the focus of your organization’s work. Be honest about areas where you have expertise, resources, professional networks, etc. and areas where you have questions or will need to learn from the community in order to be effective. Tell the story of why your organization got engaged with DEIJ issues and how you came to identify this community as a place where you want to build or strengthen relationships. If there have been past interactions with the community that have not gone so well, acknowledge that and ask questions about how your organization can improve. Transparency, authenticity, and honesty are key to trust building.
- **Commit to the long-haul:** One pitfall that organizations can fall into when building relationships is allocating less time and resources than needed to build personal relationships based in trust. Another pitfall is “parachuting” in and out of communities when it is convenient to your initiative. Building relationships takes a lot of time and should not be limited to the timeframe of one project. For this reason, it is best to really take your time when completing your capacity evaluation in Recommendation 1B. It is better to build a long-term relationship in one community and do it well than to attempt relationship building with multiple communities, which could result in burn- out of your staff and creating expectations that you cannot meet in the communities you’ve begun to get to know.

**Case Study: Flood Experience Mapping (Freeport, IL)**

In Freeport, Illinois, the East Side Neighborhood and the local government were experiencing strained relationships due to tension over the impact of flooding and floodway regulations on this historically black community. Because FEMA floodway regulations had disproportionately impacted this community for years, housing values had plummeted and investment and services in the East Side had declined significantly. Enforcement of these regulations fell to the local government causing immense strain between local government representatives and community residents.

Discussions about solutions to stormwater impacts had been at an impasse for years, when the U.S. EPA decided to try a new approach. Neutral facilitators provided by EPA led community residents in a flood experience mapping exercise with local government staff observing. Residents were able to share information about the location and perceived source of flooding in their community. The resulting map is not a technical analysis but instead captures the experience of local residents.

The mapping exercise, which respected the expertise of residents, built trust and understanding between residents and local government staff, and it opened the door to conversations resulting in consensus on recommendations for municipal investments in green and grey infrastructure to stem longstanding flooding.

For more information: [East Side Revitalization](#) (U.S. EPA, 2013)

### **Case Study: Connecting Community Needs to Watershed Resources (South River Federation)**

South River Federation (SRF) recognized that one of their main challenges in connecting with diverse and under-resourced communities in their watershed was learning how to demonstrate the relevance of their work. Many low-income communities have day-to-day needs that are more pressing than watershed protection. SRF was challenged with how to find the right ways to use to communicate about their work and what resources they have available.

By starting with a Community Needs Assessment dialogue, SRF could enter the Bywater community in a listening role and consider how their own resources and interests related to existing community interests. The Community Needs Assessment dialogue included facilitated discussion about the community's history, assets, challenges and needs.

One meaningful insight from the dialogue was that longtime residents were historically connected to the natural features of the area. New housing developments over the last several decades have limited the Bywater community's access to nature by privatizing remaining natural spaces. This historic connection to nature revealed a shared interest in access to nearby natural and outdoor spaces that led SRF and community residents into deeper dialogue about the way SRF resources for watershed protection could be used to meet present-day community needs. Together, dialogue participants identified job creation as one possible avenue for shared work on watershed protection and community reinvestment.

Case study adapted from: [Expanding the Circle: Strategies to Authentically Engage Under-Resourced Communities to Improve the Chesapeake Bay for All](#) (CBFN, 2017)

#### **D. Allow these relationships to guide development of outreach, engagement and project priorities that meet community needs.**

- **Work together to identify connections between community needs and your organization's areas of expertise:** Sometimes the connections between community needs and your organization's work will be obvious, and sometimes it may take some creativity and joint brainstorming to identify the right fit. Focus on identifying areas of mutual interest and benefit, rather than imposing outside goals regarding outreach and engagement on a community.
- **Identify outreach and engagement goals that support meeting community needs:** Once you have identified these connections, your organization will be able to identify outreach and engagement goals that appropriately support the project you have identified together. Although the process of identifying outreach and engagement goals as an outcome of relationship building and conversation may take more investment and effort than identifying these goals up front, the resulting goals will be stronger, more realistic and aligned with efforts that will be more likely to succeed.

### **Recommendation 2: Increase capacity for partnerships with diverse and underserved communities.**

#### **A. Build support within your own organization to commit to equitable partnerships with diverse and underserved communities.**

- **Evaluate current partnerships:** Develop a map of your organization's current partnerships and collaborations. This map could be a geographic map to illustrate physical locations or could be done through bubble maps that illustrate relationships, power imbalances, etc.



Questions to consider could include:

- ✓ Do your partnerships reflect your organization's commitment to DEIJ, or do you primarily partner with organizations that are similar to your own?
  - ✓ What gaps and opportunities do you see based on the locations of these partnerships?
  - ✓ What partnerships are working smoothly and effectively, and what partnerships have room for growth?
- **Build understanding of key equity and justice concepts:** Committing to equitable partnerships requires that your staff and board:
    - ✓ Have a shared language for talking about equity and exploring what equity looks like in the context of your organization's partnerships. (See Chapter 3, Recommendation 1C and the resources text box below)
    - ✓ Understand the history and meaning of the environmental justice (EJ) movement and the principles of environmental justice. (See Chapter 3, Recommendation 1C)
    - ✓ Understand the history of communities you are interested in partnering with. (See Chapter 4, Recommendation 1A)

Review the recommendations referenced above, and spend time exploring the equity resources below.

- **Commit to equitable partnerships:** Based on what you have learned about environmental justice and equity, develop an organizational commitment to equitable partnerships that support other leaders' efforts who are already doing the work in communities of color and underserved communities.
- **Build in support:** Commit staff time and resources to pursue equitable partnerships.

#### Resources on Equitable Partnerships

- [Building Equitable Partnerships for Environmental Justice Curriculum](#) (University of California, Davis, and University of Michigan, Ann Arbor, 2018)
- [Draft Environmental Justice Primer for Ports: The Good Neighbor Guide to Building Partnerships and Social Equity with Communities](#), pages 12-15 (U.S. EPA Office of Transportation and Air Quality, 2016)
- [The Intersector Toolkit](#) (The Intersector Project)

#### Case Study: Partnership Mapping

The Pittsburgh Food Policy Council has developed an online members directory that demonstrates the relationships between their members. To view this example, visit: [Pittsburgh Food Policy Council Members Directory](#).

### B. Set shared goals for partnership.

- **Focus on relationship building first, and then develop shared goals for partnership and collaboration:** As your relationship with underrepresented communities matures (see Recommendation 1C for additional detail), consider formalizing an equitable partnership. Successful partnership goals will evolve out of strong relationships and represent shared, mutually beneficial aims. Build shared experiences, relationships, and trust between your organization, environmental leaders, and underrepresented communities.
- **Center the partnership on community-identified needs and priorities:** Ask, what are your community's needs and priorities? How can we help and support your work in meeting these goals?



- **Follow best practices for equitable partnerships, such as:**
  - ✓ Learn from grassroots leaders how to be effective in their communities and compensate them for this mentorship.
  - ✓ Talk about what an equitable partnership would look like to both organizations, and write it down! Formalize partnerships through a memorandum of understanding (MOU) and principles of engagement.
  - ✓ Commit to working through challenges in the relationship together. This may mean refining an MOU or the principles of engagement when challenges arise.
  - ✓ Pursue joint applications for funding that benefit and build the capacity of both organizations.
  - ✓ If your organization has a vendor or contractor procurement policy, consider prioritizing locally-owned vendors and contractors from the neighborhoods so that resources are maximizing benefits to the target community.

**C. Provide support to bridge the resource gap between “mainstream or established” organizations and community-based organizations and partners.**

- **Be sensitive to and address resource imbalances:** Partnering with leaders in underserved communities often means partnering with unpaid volunteers or with organizations whose resources and time are stretched extremely thin. Provide your staff with the support to address these resource imbalances in a sensitive manner. This could include:
  - ✓ Providing your staff with flextime, in order to attend meetings at times convenient to community leaders (e.g., evenings and weekends), instead of restricting meetings to “standard business hours”.
  - ✓ Supporting the additional time and resources it takes to schedule meetings at locations convenient and culturally accessible to community leaders (e.g., located in the community, at venues seen as community-friendly and accessible via public transportation).
  - ✓ Support staff in pursuing funding and capacity building that lift up partner organizations and strengthen their capacity to partner effectively with their community and with your organization.
- **Understand and use relevant messaging:** Communities of color and underserved communities may think about and talk about the built and natural environment differently from the language and messaging more established environmental and watershed organizations commonly use.
  - ✓ Encourage your staff to explore these differences up front as they develop partnerships.
  - ✓ Support staff who want to develop outreach materials and other resources that use the language most familiar and comfortable to community leaders.
  - ✓ Be willing to engage with community-based organizations who are messaging one way to funders and another to their communities. This may mean allowing your staff to take additional time to define shared goals and terminology in an MOU, so that everyone is clear about the best language to use and that both organizations are on the same page about how to message appropriately and consistently to varied audiences.

**Case Study: Supporting Staff Needs by Adapting Your Office Culture (Blue Water Baltimore)**

When Blue Water Baltimore staff were resistant to working “after hours” to meet with communities, the organization decided to allow for flex time and a more supportive work environment for staff. This small, but intentional policy shift led to a larger shift in the culture of the organization. Because staff felt supported in their work-life balance needs, they were able to better serve the communities to which they were assigned by scheduling meetings at times that worked well for community residents.

## Chapter 5: Advancing DEIJ Outcomes through Grantmaking

Chapter 5 of the DEIJ Guide is recommended for all funders. Some organizations working to restore clean water may also wish to review this information to better understand the conversation about funder priorities related to DEIJ.

This chapter focuses on strategies for funders to achieve their DEIJ goals through grantmaking. These recommendations include process-oriented strategies for expanding and institutionalizing your DEIJ grantmaking as well as recommendations for what to fund.

Part of your organization's process will need to include clarifying your DEIJ grantmaking goals. Some funders may choose to fund in each of the three major categories recommended below and others may choose to prioritize one category over the others to increase their impact. Consider coordinating with like-minded funders regionally to ensure that the Chesapeake Bay Watershed Region as a whole has access to all three types of funding. Additional opportunities for regional collaboration can be found in Chapter 6.

### Recommendation 1: Build support and clarity for DEIJ grantmaking goals, evaluation, and process.

#### A. Build support and clarity for DEIJ grantmaking goals within your organization.

- **Build support and capacity for DEIJ within your foundation:** Encourage staff and board to participate in training that helps them examine their power, privilege, and role as gatekeepers of resources in relation to their grantees and the communities they support.

If DEIJ is a new concept for your organization, consider what your additional internal capacity building needs are using the recommendations in Chapter 3. You may also wish to use some of the resources listed in Chapter 4, Recommendation 2A to build awareness about equity and environmental justice.

- **Clarify DEIJ grantmaking goals:** Grantmaking is a powerful tool for growing the practice of DEIJ in the Chesapeake Bay Watershed Region. Because there are so many different aspects to advancing DEIJ – both internal to grantees and external through their environmental work, establish clear expectations about what your organization wants to accomplish so that the applicants know:
  - ✓ how and why DEIJ metrics are linked to broader environmental goals
  - ✓ what types of DEIJ measures and commitments make them competitive in the application process, and
  - ✓ what types of DEIJ outcomes are expected as a result of funded work.
- **As needed, set new targets and measures of success for funding DEIJ work:** Traditional funding has focused on funding projects with measurable environmental outcomes to the exclusion of worthy projects that require DEIJ investments up front. As discussed earlier in this guide, investing DEIJ work on internal organizational capacity building, relationship building, and partnership development will ultimately lead to more effective environmental outcomes and benefits in communities that may have been overlooked in the past.
- **Increase funding available for DEIJ work:** Many funders will need to increase the balance of funding available for capacity building, which will mean developing new measures of success that reflect capacity building, relational and partnership outcomes in addition to environmental outcomes. Funders may want to

consider creating new grant opportunities to specifically target DEIJ work, environmental justice, and partnership building.

- **Track progress towards your DEIJ grantmaking goals annually:** Just as your organization evaluates the success of grantee work, evaluate your own organization's success in advancing DEIJ on annual basis. You may wish to develop a "report card" based on the targets and measures of success you identified in the action step above to help track progress. Examples that could be tailored to your organization's specific goals could include:
  - ✓ Support for DEIJ capacity building at "mainstream" organizations
  - ✓ Support for projects serving communities of color and low-income communities
  - ✓ Support for projects that represent a partnership between "mainstream" organizations and organizations led by people of color
  - ✓ Support for organizations led by people of color
- **Use demographic information to disaggregate data to ensure true progress:** Sometimes, aggregated data can hide the fact that while your organization may be making progress overall, specific groups are being left out or left behind. For example, imagine a school where average test scores are rising but the gap in performance between white students and students of color is actually growing. Aggregated data would only tell you about the perceived success, but would leave you in the dark about the increasing performance gap. Data disaggregated by race would help you identify the performance gap and allow you to refine your grantmaking strategies to ensure the gap is addressed.
- **Incorporate sufficient time to build meaningful, principled partnerships into grantee timelines:** Funded projects that include relationship building and partnership building may require extended grant timeframes to allow adequate time to build meaningful partnerships before beginning joint-environmental work. The amount of time needed to build productive partnerships will vary significantly based on context; this will be an on-going process even after the joint environmental work begins. Ask potential grantees for feedback on how grant timeframes may need to be adapted to best support them while maintaining accountability for results.

#### **Case Study: The Case for Disaggregating Data**

In "By the Numbers - Using disaggregated data to inform policies, practices and decision-making," the Annie E. Casey Foundation offers three case studies highlighting the use of disaggregated data. One of these summaries includes data from the 2014 KIDS COUNT policy report. The KIDS COUNT policy report provided insight into how race and ethnicity may influence a child's chance for success in life. According to Annie E. Casey (2014), Minnesota was ranked number one in the 2015 KIDS COUNT Data Book, which ranks states annually in child well-being; however, looking at data on extreme poverty disaggregated by race revealed significant disparities for children of color, demonstrating why it is important not to mistake positive outcomes for some children as reflective of all children. As result, the report recommends that 1) racial and ethnicity data be gathered and analyzed by funders to inform policies, practices, and decision-making; 2) data be used to target investments to address disparities; and 3) evidence-based programs be developed to improve outcomes for youth of color.

For more information: Mong, C., Sykes, N., West, N., (2016). By the Numbers, Using Disaggregated Data to Inform Policies, Practices, and Decision-Making; Retrieved from <https://www.aecf.org/resources/a-race-for-results-case-study-2/>

## Examples of DEIJ in the Grantmaking Community

- [Building Equality and Alignment for Impact](#): “BEA brings together dynamic grassroots organizing groups, effective national green organizations, and innovators in philanthropy to advance the progress of the environmental movement towards a just transition and directly confront powerful polluters.”
- [Funders’ Network for Smart Growth and Livable Communities](#):
  - [PLACES Fellowship](#): “Because the needs and perspectives of low-income communities, often comprised of people of color, have been systematically disregarded in decision-making about growth and development, the Funders’ Network developed the PLACES Fellowship. The PLACES Fellowship develops tools and provides resources to help funders understand and eliminate the disproportionate impact of these decisions.”
  - [Partners for Places Grant Program](#): “National funders invest in local projects that promote a healthy environment, a strong economy, and well-being of all residents.”
- [Green 2.0](#): “Green 2.0 is an initiative dedicated to increasing racial diversity across mainstream environmental NGOs, foundations and government agencies. The Green 2.0 working group advocates for data transparency, accountability and increased resources to ensure that these organizations increase their diversity.”
- [InDEEP](#): “Inclusion, Diversity, and Equity in Environmental Philanthropy is a professional development series that engages a network of foundation staff, including senior leaders, committed to integrating racial equity and social justice throughout their environmental philanthropy. We support environmental grantmakers to cultivate opportunities to increase funding for organizations led by people of color, use a justice and equity lens in their grantmaking, and strengthen the capacities of grantee organizations and leaders across the field to create a more diverse and inclusive environmental movement.”
- [Justice Funders](#): “A partner and guide for philanthropy in reimaging practices that advance a just and thriving world.”
- [Kresge Foundation](#) and their [Climate Resilient and Equitable Water Systems](#) initiative: “An initiative to transform urban stormwater and wastewater systems so they provide reliable, equitable and innovative services to communities despite the uncertainties introduced by climate change.”
- [National Committee for Responsive Philanthropy](#) and their [Power Moves](#) initiative: “NCRP promotes philanthropy that serves the public good, is responsive to people and communities with the least wealth and opportunity, and is held accountable to the highest standards of integrity and openness.”
- [Philanthropy Northwest](#) and their [DEI Program Offerings](#): “Together with The Giving Practice, our national consulting arm, we offer a range of Diversity, Equity and Inclusion-focused programs, from one-day trainings and personalized consulting services to multi-year fellowships.”
- [Washington Regional Association of Grant Makers](#): “In 2016, the Washington Regional Association of Grantmakers launched *Putting Racism on the Table*, a learning and action series for philanthropy.”

## B. Ensure diversity and inclusion in grantmaking decision-making processes.

- **Engage diverse and underserved groups in setting grantmaking priorities:** As you evaluate grantmaking priorities, ensure the inclusion of feedback from diverse and underserved groups. This could include:
  - ✓ Increasing the diversity of board and staff who help set grantmaking priorities.
  - ✓ Developing a DEIJ advisory committee that is reflective of diverse and underserved communities you wish to fund. (Be sure to compensate them for their time and expertise.)
- **Set goals for increasing diversity of application evaluation committees:** If your organization utilizes a committee approach to grant select, set a goal for each committee to reflect the diversity of the region your organization funds.

## C. Develop standards for evaluating the authenticity of DEIJ inputs and outcomes during the grantmaking process and during the grant evaluation process.

- **Reward applicants for internal DEIJ work:** Award points for explicit internal DEIJ investments and outcomes. For example:
  - ✓ Diversity of the organization (board, staff and other governing structures) reflects that of the target community.
  - ✓ DEIJ is incorporated into the organizations' mission and vision statement or a corresponding DEIJ policy statement.
  - ✓ Key project staff members have had DEIJ training.
  - ✓ The organization has a DEIJ action plan or strategic plan (or DEIJ goals incorporated into work plans).
- **Prioritize applicants who directly represent (or compensate partners from) communities of color and underrepresented communities:** Value and invest in community knowledge and expertise. Funders can begin to directly compensate local leaders and local expertise that is often extracted by big brand groups but goes undervalued when local groups apply for funding directly. Financial support makes a big difference to those who are working to create transformation at the most local level.
- **Define “partnership” from a DEIJ standpoint and reward applicants who can meet this standard:** Require applicants to articulate how they will collaborate equitably with their project partners on implementation of the grant. Examples could include:
  - ✓ Move from requiring letters of support to requiring letters of commitment and/or Memorandums of Understanding. For example, an MOU could document an agreement regarding what resources will go directly to fund local expertise.
  - ✓ Look for demonstrations of partnership such as local leaders on research teams or use of Community-Based Participatory Research methods.
  - ✓ Look for demonstrations of commitment to building equity and strong relationships throughout partnership such as compensation of local leaders, development of principles of collaboration, or inclusion of DEIJ training for project partners in the application.
- **Ask applicants to articulate the DEIJ measures of success that are relevant to their project during the application process:** Define diversity, equity, inclusion, and justice, and ask grantees how they will incorporate each of these elements into their work. What measures of success would they propose for each of these categories? Work with funded grantees to refine and agree to final measures of success.

- **Develop new, relevant metrics for DEIJ success to use in the grant evaluation process:** Established metrics for programmatic success often undercount successful public education, relationship building, advocacy, and community organizing. Community organizing and mobilization are not traditionally funded, and yet these are the outcomes that usually deliver policy and legislative success. As your organization gains experience in funding DEIJ projects, you may wish to adopt standard DEIJ measures of success for grantees, based on lesson learned in partnership with your grantees.

## Recommendation 2: Build the internal DEIJ capacity of environmental grantees.

### A. Fund DEIJ capacity building grants for existing environmental grantees.

- **Build internal DEIJ capacity of environmental grantees:** Per Chapter 3 of this guide, addressing internal barriers and growing the internal capacity of environmental organizations to address DEIJ builds a strong foundation for advancing DEIJ outcomes in the Chesapeake Bay Watershed. Fund grantees to conduct self-assessments and build their own capacity for DEIJ in the following areas:
  - ✓ Diversifying the organization (staff, board, volunteers, contractors, etc.),
  - ✓ Shifting the internal culture of the organization,
  - ✓ Partnering directly with leadership from underserved and diverse communities, and
  - ✓ Ensuring the environmental work grantees do benefits underserved and diverse communities.
- **Potential funding opportunities:** Types of applications that could be sought in this area include:
  - ✓ Conducting a DEIJ self-assessment
  - ✓ Developing a DEIJ action plan or strategic plan.
  - ✓ Meeting a DEIJ training or capacity building need of staff and board members

## Recommendation 3: Build the capacity of low-capacity groups to receive grants directly.

### A. Fund capacity building grants for low-capacity community-based organizations.

- **Develop funding specifically aimed at low-capacity community-based organizations:** Smaller community-based organizations are often doing environmental work already, but may use different messaging than traditional environmental grantees and may have limited capacity to pursue and manage grants. Despite these barriers to accessing the traditional grantmaking process, these grassroots leadership organizations are providing unique value to the community that is often overlooked or discounted yet has long-lasting, positive impact. These organizations know community needs and priorities, know how to do work effectively in their own communities, and have credibility that would take years for an outside environmental organization to develop.

Developing a funding pool specifically aimed at these organizations can help ensure they are competitive in the grantmaking process and build their capacity to seek funding from traditional “environmental” grant programs. Requirements for accessing funding could be reduced (e.g., especially for sophisticated planning documents like engineered plans or special calculations of stormwater).

- **Consider funding at three levels of capacity needs:**
  - ✓ *Individual organizational capacity:* training, educational awareness, helping these organizations get up to speed in areas where they do not have expertise (e.g., grant management)

- ✓ *Institutional capacity*: provide funding for staff development and general operating support, not just for activities or projects; to be efficient these organizations need to have resources; sometimes they are not efficient because it's just one individual applying every year, doing the fiscal management, and delivering the programmatic work.
- ✓ *Programmatic capacity*: offer multi-year funding for programs as opposed to funding isolated activities and projects; this will increase the impact of the funding.
- **Provide multi-year funding for community-based groups**: Provide larger, multi-year funding that enables groups to do the work that communities know they need to impact the environmental and quality-of-life issues they have prioritized. Multi-year, programmatic funding can make the grant making process worth it for these community-based organizations, as multi-year funding allows for longer-term planning and frees up staff time and energy instead of draining the limited resources a smaller organization already has.

**Case Study: EPA's Environmental Justice Small Grants Program**

This federal grant program offers small capacity building grants of up to \$30,000 each to environmental justice organizations to help build their capacity. These grants are intended to help these organizations build a grant management track record while working on issues of environmental exposure. As recipients' capacity expands through experience with the EJ Small Grant, they can apply more successfully for larger grants. EPA also expends staff time in performing an audit check of letters of support that accompany these grant applications to ensure that partner groups are meaningfully engaged with the applicant.

For examples of successful projects, visit the [EJ Small Grants Program webpage](#).

**B. Address the barriers that lower-capacity grantees experience in applying for and managing grants.**

- **Provide technical assistance with applying for and managing grants**: Low-capacity community-based organizations need real resources and may not have experience with successful grant acquisition and management. Technical assistance strategies could include:
  - ✓ Host workshops on what makes a good grant application.
  - ✓ Webinars and in-person trainings on how to fill out applications.
  - ✓ Host workshops on best practices in grant management.
  - ✓ Connect low-capacity applicants with successful grantees.
- **Streamline and standardize across funders**: Streamline and standardize grant application and reporting requirements to make it more accessible to community-based/grassroots groups.
- **Support capacity building and mentoring**: Set-up a mentoring program between larger environmental groups to help smaller environmental/EJ groups grow their capacity.



## Recommendation 4: Prioritize funding for projects that advance benefits to and equitable partnerships with communities of color and underserved communities (over projects that simply advance engagement of these communities).

### A. Fund environmental projects that reduce environmental impacts, expand environmental benefits, and address community needs in underserved communities.

- **Expand the impact of existing programs:** Consider building upon Chesapeake Bay Trusts and CBFN's existing Capacity Building Initiative supporting establishment of place-based cross-sector networks by engaging the environmental justice community in a participatory grantmaking process designed to advance shared outcomes and/or increase the capacity of the EJ field in the region.
- **Ensure that the environmental benefits in which your organization invests are having an equitable impact:** Assess whether each environmental program your organization offers (e.g., clean water, recreational access, environmental education), benefits all communities in your target area. See Chapter 4, Recommendation 1A for additional considerations on evaluating the equity of your investments through mapping and analysis.
- **Prioritize funding for environmental projects that benefit communities of color and underserved communities directly:** Organizations representing communities of color need to benefit directly from environmental grantmaking. After doing your own internal work (or even simultaneously with it), this is the most important recommendation for funders. Environmental justice communities and other impacted communities will only believe that funders' pursuit of DEIJ is real when grant funding begins to shift and equal out. This is where the rubber hits the road.

Strategies for helping prioritize projects that benefit these communities directly include:

- ✓ Addressing community-identified needs.
  - ✓ Using a participatory grantmaking process.
  - ✓ Being driven by equitable partnerships between environmental organizations and community-based organizations.
  - ✓ Funding community-based organizations directly, instead of “big-box” environmental groups.
- **Develop clear criteria for evaluating applications to prioritize the above outcomes:** See Chapter 5, Recommendation 1C for suggestions about relevant grant application criteria.

#### **Case Study: Co-benefits of watershed restoration in underserved communities**

Spa Creek Conservancy has been working proactively to fund restoration projects in underserved communities. With a planning grant from the Chesapeake Bay Trust, the Conservancy developed a restoration plan for the Hawkins Cove Watershed, which is a critical mini-watershed that includes Eastport Terrace and Harbor House. These public housing communities are important to the restoration of the watershed due to their large footprint, and the restoration of the watershed has potential to address sustainability issues that impact public housing residents. Spa Creek Conservancy has partnered with the Housing Authority of Annapolis, MD, to engage residents of these two communities in watershed restoration and is currently raising funding for implementation. Spa Creek Conservancy believes that, “the collaborative, multi-stakeholder programming we are now developing has the potential to become a Nation model for dealing with sustainability issues confronting public housing.”

For more information: [Hawkins Cove Restoration Project](#)



**Case Study: Meeting Indoor Plumbing Needs and Improving Bay Water Quality on Virginia's Eastern Shore**

Virginia's Eastern Shore has many residences that lack indoor plumbing. Residents in these circumstances often use night pails, unpermitted privies or backyard port-a-johns. In addition to the impact on quality of life, this antiquated problem results in human waste disposal practices that threaten water quality in the Chesapeake Bay Watershed and endanger the local seafood and tourism economy. Historically, the full extent of the problem has not been documented but is suspected to impact hundreds of homes.

The Accomack-Northampton Planning District Commission (A-NPDC) has championed efforts to solve the indoor plumbing challenge. Over the past several decades, A-NPDC has led a comprehensive rehabbing effort that will improve water quality, protect the local economy, and provide basic plumbing for families without access. Funding has traditionally come from the state's Indoor Plumbing Rehab and Community Development Block Grant programs; however, in recent years, funding cuts and shifts in funding priorities have led the A-NPDC to look for more diverse sources of funding that will allow them to significantly accelerate rehabilitation efforts to ensure residential plumbing on the Eastern Shore meets modern day standards for the United States.

With support from the National Fish and Wildlife Foundation, a contractor conducted a windshield survey on behalf of A-NPDC to identify homes on the Bayside of the Eastern Shore that need indoor plumbing and developed a prioritization and funding framework for resolving remaining indoor plumbing needs and improving water quality in the Chesapeake Bay Watershed in the process.

Adapted from: [Indoor Plumbing Needs on the Eastern Shore of Virginia](#) (Skeo, 2015)

**Case Study: Historic Settlement of a Civil Rights Complaint**

The BTB Coalition and the Patuxent River Keeper filed a Title VI civil rights administrative complaint against the Maryland Public Service Commission and several other state agencies to prevent the siting of additional power plants in Brandywine, MD. The complaint alleged discrimination based on race, in violation of Title VI of the Civil Rights Act of 1964, and in violation of U.S. DOT and US EPA regulations relating to the process and decision to issue a Certificate of Public Convenience and Necessity (CPCN) to Mattawoman Energy, LLC for the construction of a natural gas-fired power plant in Brandywine, MD and to the public engagement process prior to the decision to issue a CPCN certificate for this plant. This settlement will establish for the first time ever civil rights enforcement systems within the environmental, energy and natural resource sectors of Maryland State government.

For more information: [Final Resolution Letter and Agreement to MD Recipients](#) (U.S. DOT and U.S. EPA, 2019)

## Chapter 6: Regional Investments to Amplify DEIJ Outcomes

Chapter 6 of the DEIJ Guide is recommended for all organizations (both funders and organizations working on watershed issues) who are involved in DEIJ thought-leadership and collaborative efforts at the regional level.

While Chapters 3-5, focus on strategies individual organizations can pursue, Chapter 6 outlines recommendations that organizations engaged in regional collaboration could support to:

- collectively build the capacity of smaller community-based organizations.
- build the internal DEIJ capacity of funders and organizations working on watershed issues.
- build relationships with smaller community-based organizations to guide further support.
- make the case that DEIJ advances watershed restoration.

### Recommendation 1: Build the capacity of smaller community-based organizations.

- A. Develop and share a contact list of resource agencies and organizations that can support low-capacity community-based organizations with legal advice, accounting, non-profit formation, and other administrative functions. For example, the Chesapeake Legal Alliance can help provide permit review; other institutions are equipped to guide CBOs through the 501(c)(3) certification process.
- B. Leverage the CBFN Capacity Building Initiative to share lessons learned, provide training for other funders on how to adapt the program to their needs, and periodically collaborate with participants to revisit the structure of this initiative as needed to address new opportunities.
- C. Develop a handout or short guide designed to help foundations address grant management with lower capacity organizations in a culturally sensitive way.

### Recommendation 2: Build the internal DEIJ capacity of funders and organizations working on watershed issues.

- A. Develop a guide to raising board/executive leaders' awareness of DEIJ, examining an organization's mission and vision relative to DEIJ, and setting DEIJ goals. The guide might include discussion of each element of DEIJ, DEIJ's connection to the environmental field, discussion of common questions a board might raise, and tips on how to facilitate conversations productively.
- B. Utilize existing convenings to provide training that advances DEIJ awareness and skills building among funders and organizations working on watershed issues.
- C. Design and offer a training and workshop series focused on DEIJ and environmental grantmaking. Consider partnering with other interested funder groups and/or aligning with existing efforts such as InDeep. The effort could provide opportunities for personal growth and DEIJ awareness, access to best practices and examples from the field and safe space for foundation staff and/or trustees to surface and address real and perceived barriers to advancing DEIJ in environmental grantmaking.

As feasible, consider structuring this series as a learning cohort (e.g., for executive directors, board members, junior staff), so that participants have structured opportunities to network with each other, try out various implementation strategies and troubleshoot together. This format could take the learning experience to the next level for participants.

- D. Create regular opportunities for further training around understanding issues of equity and justice and how to integrate them into watershed/environmental advocacy. Consider creating a training curriculum and including regional leaders as paid trainers (e.g. SERCAP, River Network, DMV EJ Coalition, Union Hill/Friends of Buckingham, WV Rivers, NAACP, Blue Water Baltimore).
- E. Design a training guide to demonstrate how to use various analysis tools to advance DEIJ, such as:
  - ✓ Mapping tools (e.g., U.S. Census website, EPA's EJ Screen tool, Maryland's EJ Screen tool) being used to examine aggregated environmental, public health and socio-economic data and to support DEIJ prioritization and decision-making.
  - ✓ The [Citizen Stewardship Index](#) being used to support investments in DEIJ.

### **Recommendation 3: Build relationships with environmental justice and social justice community-based organizations to inform and guide further DEIJ actions.**

- A. Fund a workgroup of funders and environmental justice (EJ) and social justice leaders to develop next steps for strengthening direct relationships between EJ groups and funders, prioritize and develop supporting tools and resources, and increase funded projects led by EJ groups. Building on the facilitated roundtable held with EJ leaders in November 2017, these action steps could cover topics such as:
  - ✓ How funders can support the work of environmental and social justice leaders.
  - ✓ The challenges and opportunities that the smaller environmental and community-based groups experience trying to access funding.
  - ✓ Opportunities for building the capacity of environmental and social justice leaders.
  - ✓ How funders can sponsor topics or projects important to EJ communities that may be considered "politically charged."
  - ✓ Developing the resource contact list (Recommendation 1A).
- B. Fund an initiative to deepen relationships and design collaborative strategies, programs and partnerships between the region's environmental justice and established environmental community. Building on the facilitated roundtable held with EJ leaders in November 2017, these actions could focus on:
  - ✓ Strategies for mainstream environmental organizations to build trust with EJ leaders and groups.
  - ✓ Strategies to advertise benefits of coalition membership and increase membership from EJ groups.
  - ✓ Development of new, intentional partnerships between Coalition members and grassroots groups who are working to address water-related issues.
  - ✓ Supporting development of the resource contact list (Recommendation 1A).
- C. Develop a clearing house for sharing successful projects/partnerships between EJ groups, traditional organizations working on watershed issues and funders. This could include development of an online platform, promotional materials, conference sessions and other traditional means of sharing lessons learned from watershed work.

### **Recommendation 4: Make the case that DEIJ advances watershed restoration.**

- A. Fund a cohort of funder and NGO leaders to better understand the connection between DEI and achieving environmental goals and outcomes, and collaboratively develop tools and materials designed to help others navigate this space.
- B. Fund research that expands data available on the connection between DEIJ and watershed restoration.

- C. Fund prominent leaders to speak about these connections to varied audiences.
- D. Develop a report that “makes the case” that investments in DEIJ make a difference in environmental restoration. This case statement was the most requested resource from environmental funders, environmental organizations, and government agencies during this process. It could be used by multiple entities to advance DEIJ in varied ways across the watershed. Commonly requested elements of such a report include:
  - *Framing DEIJ in the Environmental Field*: Develop language for effectively communicating about the need for, and value of, DEIJ. (e.g., language about the expanding electorate, demographic change in America and in the watershed region, disproportionately meager philanthropic support for environmental protection and advocacy in communities of color, need for increasing a shared language between environmental/social justice organizations and mainstream environmental organizations/funders)
  - Connect DEIJ to Water Quality Outcomes:
    - Provide data that helps support this connection broadly
    - Share models for disaggregating data in the water space to examine/communicate about disproportionately adverse impacts on low-income communities and communities of color.
    - Address how to “make the case” in scenarios where you have data and where you don’t have data
  - Case studies that illustrate a variety of connections between DEIJ and water quality outcomes, such as:
    - How DEIJ initiatives and/or partnerships can be essential to advancing environmental restoration.
    - How not investing in DEIJ could result in barriers to environmental restoration
    - How cynical affinity politics can be used to advance an anti-environmental agenda and how better collaborative approaches and relationship building could avert these tactics.
    - How finding unique connections between meeting community needs and advancing water quality outcomes can lead to strong partnerships and unexpected co-benefits.

## Chapter 7: Developing a DEIJ Action Plan for Your Organization

Chapter 7 of the DEIJ Guide offers guidance on how to assess the recommendations of this guide and work with your board and staff to develop an action plan specific to the needs of your organization.

This chapter provides a guide to help your organization talk about DEIJ and develop an action plan for improving DEIJ within your organization and environmental work. The roadmap below is organized into a series of steps with tools and templates to help you get started.

### Roadmap for Developing a DEIJ Action Plan

As noted in Chapter 1, developing a DEIJ Action Plan for your organization can be a meaningful way to prioritize complementary phasing and an effective balance of investments that advance DEIJ outcomes within your organization as well as DEIJ outcomes in your environmental or grantmaking work. Due to time and resource constraints, most organizations using this guide will need to prioritize a subset of actions with which to start – this subset of actions can be captured formally in a DEIJ Action Plan.

The diagram below offers a step-by-step process for developing a DEIJ Action Plan based on the recommendations of this guide (Chapters 3-6). Each step in the process is described in more detail in the section below, including tools and templates that can help with each step.



Successfully advancing DEIJ requires adopting the position of a learner and undertaking training and capacity building activities throughout the process. Although this diagram shows a linear process, organizational change by nature is iterative. Build in flexibility into the process with opportunities for reflection, course correction, revisiting of assumptions and growth along the way.

As you go through the process of developing your plan, keep in mind the following foundational principles:

#### DEIJ Process

- ✓ Start with the inner work.
- ✓ Include staff from all levels, especially younger staff, in decision-making about DEIJ.

- ✓ Ensure your board is on board. And, more broadly, address potential resistance/hesitation to DEIJ at any level proactively.
- ✓ Solicit feedback and engage underrepresented groups in all phases of priority setting and decision making within organizations, funders, and related collaboratives (may include feedback from stakeholders outside your organization, as appropriate).

### DEIJ Actions

- ✓ Evaluate your mission for alignment with DEIJ.
- ✓ Integrate DEIJ into priority setting and organizational operations.
- ✓ Set DEIJ goals that are actionable and measurable.
- ✓ Set a cycle for evaluation and reporting on progress.

## Steps and Tools for Developing a DEIJ Action Plan

### 1. Determine which chapters are most relevant to your organization and review the recommendations.

Use the table that follows to review the recommendations and capture your initial reactions to each recommendation and its relevance to your organization. This table provides space to note whether your organization has taken many, some, or no actions relative to a recommendation. It also provides space to identify which recommendations strike you as (1) potential near-term wins that could help build momentum and a sense of accomplishment, (2) having potential for creating significant long-term change at your organization, or (3) potential to unearth strong opinions and/or resistance to DEIJ work within your organization.

Remember that your initial impressions and expectations will likely change over time as your organization goes through the process. Nonetheless, this initial exercise can help you develop and organize your own thoughts about how to tailor the rest of the steps that follow to your organization most effectively.

In addition to providing space for your notations, the table offers classifications for each strategy indicating (1) whether the strategy addresses diversity, equity, inclusion and/or justice and (2) the level of complexity. The levels of complexity were assigned using the following classification system:

1. These strategies are either foundational activities or require a lower level of DEIJ capacity within the organization.
2. These strategies may require a moderate level of effort or resources, as well as a moderate level of DEIJ capacity within the organization.
3. These strategies require a higher level of effort or resources, as well as a higher level of DEIJ capacity within the organization.

The classifications for level of complexity are intended to serve as a guide, recognizing that some strategies may span levels of complexity or be more or less challenging for different organizations. Each organization that uses this action planning guidance will undoubtedly have their own unique starting points and DEIJ priorities. So you should consider your context and priorities, and tailor your organization's action plan accordingly.

Recommendations	Strategies	DEIJ	Level	Status (none, some, a lot)	Potential impact (early win, internal challenges, significant change)
<b>Chapter 3: Advancing DEIJ Outcomes within Organizations</b>					
<b>1. Institutionalize DEIJ within your organizational culture.</b>					
A. Form a DEIJ committee or task an existing decision-making body with responsibility for setting and implementing DEIJ goals and strategies.	Ensure the committee has authority from the board or president/director to pursue specific tasks.	DEIJ	2		
	Ensure the committee has the resources needed for success.	DEIJ	2		
	Ensure diverse representation on the committee.	D, I	1		
	Consider internal vs. external representation on the DEIJ committee or on a Community Advisory Committee.	DEIJ	1		
	Ensure inclusion of diverse perspectives in DEIJ thought leadership and decision-making.	DEIJ	2		
	Ensure the committee is working at the center, not the margin.	E, J	2		
	Invest in relationships and team-building.	DEIJ	1		
	Evaluate and articulate the connection between DEIJ and your organization's mission and vision.	DEIJ	2		
	Acknowledge your organization's history, but don't let it inhibit your future.	DEIJ	2		
	Adopt a revised mission or policy statement on DEIJ.	DEIJ	2		
B. Integrate DEIJ into the organizational mission.	Invest in developing a shared language about DEIJ that helps people talk with each other effectively.	DEIJ	1		
	Understand the history and meaning of the environmental justice movement and the principles of environmental justice.	E, J	1		
	Visit sites and communities where environmental injustices have taken place in your area.	E, J	2		
	Create a safe space and take time to talk about and understand DEIJ collectively.	DEIJ	1		
C. Build a culture and an atmosphere of trust, and develop a shared language for discussing DEIJ.	Create multiple feedback mechanisms to increase comfort.	DEIJ	2		
	Conduct a readiness assessment of your organization's internal DEIJ culture and DEIJ in your external environmental work.	DEIJ	1		
	Recognize your organization's specific barriers and opportunities relative to DEIJ.	DEIJ	2		
D. Develop a DEIJ Action Plan or Strategic Plan.	Develop specific overall DEIJ goals.	DEIJ	2		
	Incorporate DEIJ actions and strategies, especially those included in your DEIJ Action Plan explicitly in your organization's budget.	DEIJ	1		
E. Include DEIJ initiatives in your budget, staffing and fundraising strategies.	Write DEIJ into all job descriptions across the organization.	DEIJ	1		
	Hire DEIJ-focused staff as your body of DEIJ-focused work expands	DEIJ	2		
	Fundraise specifically for DEIJ.	DEIJ	2		
		DEIJ	2		
<b>2. Increase diversity among board and staff.</b>					
A. Research DEIJ organizational barriers, opportunities and best practices on diversity in the environmental field.	Learn from existing research.	DEIJ	1		
	Learn from personal experiences of your staff and board.	DEIJ	2		
	Get specific about barriers and opportunities.	DEIJ	2		
B. Set goals for increasing the diversity of your organization.	Identify specific goals and priorities.	D	2		
	Be accountable using incentives, accountability measures and a review cycle.	D	2		
C. Create a pipeline of candidates.	Invest in long-term pipeline development for the environmental field.	D	2		
	When possible, hire homegrown talent.	D	2		
	Build relationships with other organizations working on DEIJ issues and the environment.	D	2		



Recommendations	Strategies	DEIJ	Level	Status (none, some, a lot)	Potential impact (early win, internal challenges, significant change)
D. Expand your networking, advertising and selection process.	Network and advertise intentionally to attract diverse candidates.	D	2		
	Understand and address implicit bias in the selection process.	D, E	2		
E. Create a culture of trust and responsiveness around DEIJ issues raised by staff.	Raise awareness about the significant challenges faced by underrepresented board and staff members.	I, E	2		
	Increasing diversity is only effective if new members feel comfortable and are encouraged to stay, flourish and advance.	I	2		
	Creating a culture of trust and responsiveness takes internal work.	DEI	2		
<b>3. Increase DEIJ capacity at all levels of the organization (e.g., board, senior management, staff and volunteers).</b>					
A. Build the capacity of your board to understand and address DEIJ.	Identify your board's capacity building needs and build their comfort with discussing DEIJ issues.	DEIJ	1		
	Conduct a demographic assessment of the board in order to increase diversity.	D	1		
	Invest in building capacity and buy-in through relationship building with leaders in the field.	DEIJ	3		
	Commit to setting aside time on the board's agenda to engage proactively with DEIJ on a regular basis.	DEIJ	2		
	Consider who champions DEIJ on your board.	DEIJ	2		
	Manage board transitions with an emphasis on building and/or transferring knowledge of DEIJ.	DEIJ	2		
B. Build relationships with and highlight organizations that do DEIJ well.	Build your network at the staff and/or board levels.	DEIJ	1		
	Provide just compensation.	E, J	2		
	Help raise the profile of organizations and models that are working well.	DEIJ	2		
	Support your own partner organizations in growing in DEIJ.	DEIJ	3		
C. Invest regularly in DEIJ training, capacity building support and resource needs.	Assess DEIJ training and resource needs annually to inform budgeting.	DEIJ	1		
	Utilize collective training to create shared understanding	DEIJ	1		
<b>Chapter 4: Advancing DEIJ Outcomes in Environmental Work</b>					
<b>1. Build long-term relationships with underrepresented communities to address community identified environmental needs.</b>					
A. Identify underrepresented groups in your service area, understand local context, and evaluate the impact of your current outreach and engagement outcomes.	Map the story of your watershed or service area.	DEIJ	2		
	Identify who you are not yet reaching effectively.	EIJ	2		
	Learn the history of the community(ies) you are interested in reaching.	E, J	2		
	Understand how current policies and programs impact the community(ies) you are interested in reaching.	E, J	2		
B. Evaluate your own capacity for relationship building with new constituencies and set goals.	Identify and prioritize the communities where you would like to expand outreach.	DEIJ	2		
	Evaluate your capacity.	DEIJ	2		
	Set realistic goals focused on relationship building, and identify resources.	DEIJ	2		
C. Build long-term, personal relationships in the communities being served in a genuine way.	Learn about community needs and priorities.	DEIJ	2		
	Share about your organization's mission/vision, initiatives, and resources.	D, I	2		
	Commit to the long-haul.	DEIJ	3		



Recommendations	Strategies	DEIJ	Level	Status (none, some, a lot)	Potential impact (early win, internal challenges, significant change)
D. Allow these relationships to guide development of outreach, engagement and project priorities that meet community needs.	Work together to identify connections between community needs and your organization's areas of expertise.	DEIJ	3		
	Identify outreach and engagement goals that support meeting community needs.	DEIJ	3		
<b>2. Increase capacity for partnerships with diverse and underserved communities.</b>					
A. Build support within your own organization to commit to equitable partnerships with diverse and underserved communities.	Evaluate current partnerships.	DEIJ	1		
	Build understanding of key equity and justice concepts.	E, J	2		
	Commit to equitable partnerships.	E, J	3		
	Build in support.	E, J	1		
B. Set shared goals for partnership.	Focus on relationship building first, and then develop shared goals for partnership and collaboration.	E, J	3		
	Center the partnership on community-identified needs and priorities.	E, J	3		
	Follow best practices for equitable partnerships.	E, J	3		
	Be sensitive to and address resource imbalances.	E, J	3		
C. Provide support to bridge the resource gap between "mainstream or established" organizations and community-based organizations / partners.	Understand and use relevant messaging.	DEI	2		
<b>Chapter 5: Advancing DEIJ Outcomes through Grantmaking</b>					
<b>1. Build support and clarity for DEIJ grantmaking goals, evaluation and process.</b>					
A. Build support and clarity for DEIJ grantmaking goals within your organization.	Build support and capacity for DEIJ within your foundation.	DEIJ	1		
	Clarify DEIJ grantmaking goals.	DEIJ	1		
	As needed, set new targets and measures of success for funding DEIJ work.	DEIJ	2		
	Increase funding available for DEIJ work.	DEIJ	3		
	Track progress towards your DEIJ grantmaking goals annually.	DEIJ	2		
	Use demographic information to disaggregate data to ensure true progress.	DEIJ	2		
	Incorporate sufficient time to build meaningful, principled partnerships into grantee timelines.	EIJ	2		
	Engage diverse and underserved groups in setting grantmaking priorities.	DEIJ	2		
B. Ensure diversity and inclusion in grantmaking decision-making processes.	Set goals for increasing diversity of application evaluation committees.	D	1		
C. Develop standards for evaluating the authenticity of DEIJ inputs and outcomes during the grantmaking process and during the grant evaluation process.	Reward applicants for internal DEIJ work.	DEIJ	3		
	Prioritize applicants who directly represent (or compensate partners from) communities of color and underrepresented communities.	DEIJ	3		
	Define "partnership" from a DEIJ standpoint and reward applicants who can meet this standard.	DEIJ	3		
	Ask applicants to articulate the DEIJ measures of success that are relevant to their project during the application process.	DEIJ	3		
	Develop new, relevant metrics for DEIJ success to use in the grant evaluation process.	DEIJ	3		

Recommendations	Strategies	DEIJ	Level	Status (none, some, a lot)	Potential impact (early win, internal challenges, significant change)
<b>2. Build the internal DEIJ capacity of environmental grantees.</b>					
A. Fund DEIJ capacity building grants for existing environmental grantees.	Build internal DEIJ capacity of environmental grantees.	DEIJ	2		
	Potential funding opportunities.	DEIJ	2		
<b>3. Build the capacity of low-capacity groups to receive grants directly.</b>					
A. Fund capacity building grants for low-capacity community-based organizations.	Develop funding specifically aimed at low-capacity community-based organizations.	DEIJ	2		
	Consider funding at three levels of capacity needs.	DEIJ	2		
	Provide multi-year funding for community-based groups.	DEIJ	2		
B. Address the barriers that lower-capacity grantees experience in applying for and managing grants.	Provide technical assistance with applying for and managing grants.	E	3		
	Streamline and standardize across funders.	E	3		
	Support capacity building and mentoring.	E	3		
<b>4. Prioritize funding for projects that advance benefits to and equitable partnerships with communities of color and underserved communities (over projects that simply advance engagement of these communities).</b>					
A. Fund environmental projects that reduce environmental impacts, expand environmental benefits and address community needs in underserved communities.	Expand the impact of existing programs.	EIJ	3		
	Ensure that the environmental benefits in which your organization invests are having an equitable impact.	E, J	2		
	Prioritize funding for environmental projects that benefit communities of color and underserved communities directly.	DEIJ	2		
	Develop clear criteria for evaluating applications to prioritize the above outcomes.	DEIJ	2		

## **2. Form and authorize a DEIJ Committee.**

In order to get started with DEIJ work, authorize a small group of folks to lead the charge and establish a baseline understanding of where the organization is starting. Chapter 3, Recommendation 1A provides a detailed discussion of considerations for formation of this committee.

Once the committee is formed and has clear authorization from your leadership structure, the committee could begin the process with the following activities:

- ✓ *Use the recommendations summary table provided above to discuss which recommendations would be a good fit now for your organization.*
- ✓ *Examine the relationship between your organization's mission/vision and DEIJ.* (See Chapter 3, Recommendation 1B)
- ✓ *Increase the DEIJ Committee's capacity to take on DEIJ work:* Review the strategies in Chapter 3, Recommendation 3, and determine what capacity building may be needed initially (which could include establishing a common language and team building exercises to establish rapport and create trust) and what capacity building would be helpful to integrate over time. Capacity building will likely be an ongoing process for the committee over the duration of their work.
- ✓ *Conduct an organizational readiness assessment.* Develop a self-assessment process to examine board and staff (and as appropriate, volunteer and donor) attitudes towards and experiences with DEIJ at your organization. Include assessment questions related to your organization's internal culture as well as your mission-related work. Refer to Chapter 3, Recommendation 1D for additional considerations.

See Appendix 2 for a sample readiness assessment that your DEIJ Committee can tailor to your organization.

### 3. Facilitate an organizational dialogue and gather ideas for goals and actions.

Following completion of the readiness assessment, host a broader dialogue within your organization to review the results and gather feedback from your staff and board. Carefully capture all feedback on DEIJ challenges and opportunities as well as ideas for potential DEIJ goals and actions, as this information will inform Step 4.

Chapter 3, Recommendation 1C provides additional considerations for building a culture of trust and creating a shared language for DEIJ that may help inform how you structure your organizational dialogue (e.g., see tips about using a “living glossary” and providing multiple mechanisms for feedback). The resource box below provides a sample agenda that could be used for a facilitated discussion. Remember that the timeframes are suggestions only and may need to be adjusted to reflect the number of people engaged in the discussion. As relevant, add questions that are specific to insights gained from the Readiness Assessment results or to challenges and opportunities your organization is currently facing.

After the broader dialogue, synthesize the results of what you have learned in Steps 1-3 into a short summary of key DEIJ challenges and opportunities for your organization.

#### Sample DEIJ Dialogue Agenda

**Purpose:**

- Understand perceptions of the current status of diversity, equity, inclusion and justice (DEIJ) at our organization.
- Identify how our organization could continue to grow and strengthen its practice of DEIJ.

**Agenda:**

Meeting Purpose and Introductions (15 min)

Results of the Readiness Assessment (30 min)

- What stands out to you?
- Does anything surprise you or raise additional questions?

Internal Culture and DEIJ (45 min – 1 hour)

- Do you see DEIJ as integral to achieving our mission? Why or why not?
- To what extent is DEIJ considered in daily operations and decision-making?
- Do our board, management and staff have the skills and tools needed to advance DEIJ?
- What training and/or resources have you received on DEIJ and racial equity issues? Any gaps?

DEIJ in our Environmental or Grantmaking Work (45 min – 1 hour)

- In what areas of our environmental or grantmaking would you like to see continued growth in DEIJ?
- Can you think of any new areas for expansion?
- What barriers to and/or opportunities for continued growth in DEIJ stand out to you?
- What resources do staff and board need to support continued growth in DEIJ in our mission-related work?

Discussion Recap and Closing Remarks (15 min)

#### 4. Prioritize goals and actions.

Based on the outcomes of steps 1-3, develop a prioritized list of draft goals and actions. The group may want to consider ease of implementation, importance to the organization and ability to influence DEIJ outcomes as they prioritize. One potential method for facilitating the prioritization process is described in the resource box below.

Once the DEIJ draft goals and actions are ready, brief the appropriate entities at the organization (e.g., executive director, board) and gather feedback on the proposed direction. Additionally, it may be valuable to maintain momentum with your colleagues by providing a report out to all staff at this stage. Engaging board and staff again at this stage will help the DEIJ committee demonstrate transparency, create effective feedback loops, and build shared understanding at all levels of the organization about how the DEIJ Committee has used the information provided by the readiness assessment and what the DEIJ Committee is recommending. This gives you an opportunity to test drive the draft recommendations and build trust and buy in prior to development of the DEIJ Action Plan.

##### **Using Dot-Voting to help with Prioritization**

Prioritizing DEIJ investments when resources are limited can be a challenge. Dot-voting is a common tool used to start prioritization dialogues because it allows each individual member of a group to share their impressions and displays the results in a visual manner that gives the group something to respond to.

To conduct a dot voting exercise:

- Create posters with the draft goals and potential actions.
- Purchase sticky dots from an office supply store or use markers.
- Determine what question you are trying to answer through the exercise (e.g., Which actions could provide potential near-term wins that could help build momentum and a sense of accomplishment? Which actions are critical for moving forward effectively? Which actions have potential for creating significant long-term change?)
- Have participants add one dot next to each goal or potential action they identify in response to the question. (If you'd like to ask more than one question at once, assign different color dots to each question. If the group is having trouble prioritizing, try the exercise again with each participant having only 3-5 dots.)

The "vote" does not need to be considered binding. Rather, it is usually viewed a starting point for opening up dialogue about where there is consensus and where additional discussion is needed to build consensus.

**5. Develop an actionable, measurable DEIJ Action Plan and implement a review, reporting and update cycle.**

Following engagement with the board and staff, incorporate the input gathered in a draft DEIJ Action Plan. Refer to Chapter 3, Recommendation 1D for considerations in building the action plan, and see the sample template below.

Recall the emphasis on inner organizational work throughout this guide and check your draft action plan to ensure that the balance of resources and activity reflects recommendations in Chapter 3: Advancing DEIJ Outcomes within Organizations.

Include a review, reporting and update cycle in the action plan document. Accountability is key to success. While individual staff or board members may be responsible for pieces of the DEIJ Action Plan, the DEIJ Committee can retain a central role in the review, reporting and update cycle for this document, reviewing outcomes on an annual basis and refining the action plan based on lessons learned and feedback received.

<b>Simple DEIJ Action Plan Template</b>				
<i>Task</i>	<i>Resources</i>	<i>Measures of Success</i>	<i>Lead</i>	<i>Timeframe</i>
<i>DEIJ within our Organization</i>				
<i>DEIJ in our Mission-Related Work (Environmental Work and/or Grantmaking)</i>				