



EDF 2014 Diversity Strategy and Recommendations

Authored by EDF's Diversity Strategy Working Group

September 2014

Statement of Intent

The basic principles of ecology demonstrate that diversity in an ecosystem fosters strength and resilience. Our aspiration is that, in creating a culture of diversity, inclusion, and solidarity, EDF may similarly foster greater strength and resilience within and beyond the organization as we work to secure meaningful and durable solutions for addressing the world’s most pressing – and increasingly urgent – environmental challenges.

Acknowledgements

Special thanks to EDF’s Diversity Committee and to our internal and external interviewees for input and feedback into this strategy.

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Executive Summary

This document details the strategies and tactics recommended for Environmental Defense Fund to become a more diverse and inclusive organization, both in the internal make up of our staff, Trustees, and Board, and in the external constituencies with whom we collaborate to reach our organization’s ambitious goals. The recommendations are to be considered and incorporated into EDF’s 5 year strategic plan, with goals and milestones set to be achieved by 2020. The Diversity Strategy and recommendations have been shared with Trustees, approved by the Executive team, and shared with staff for feedback. These recommendations have been given to EDF’s Executive team for implementation and management.

The following pages (pp. i – iv) provide the high level framework and recommendations.

Vision

A world in which people from all backgrounds and experiences feel connected to the environmental challenges we face, and are engaged in the process of creating and implementing durable, equitable solutions.

Goal

Cultivate and attain the internal mindsets and capabilities needed to become a culturally competent organization. Externally, increasingly forge diverse, inclusive, and collaborative partnerships rooted in common aspirations and values, aimed at collectively tackling the world’s most serious environmental problems.

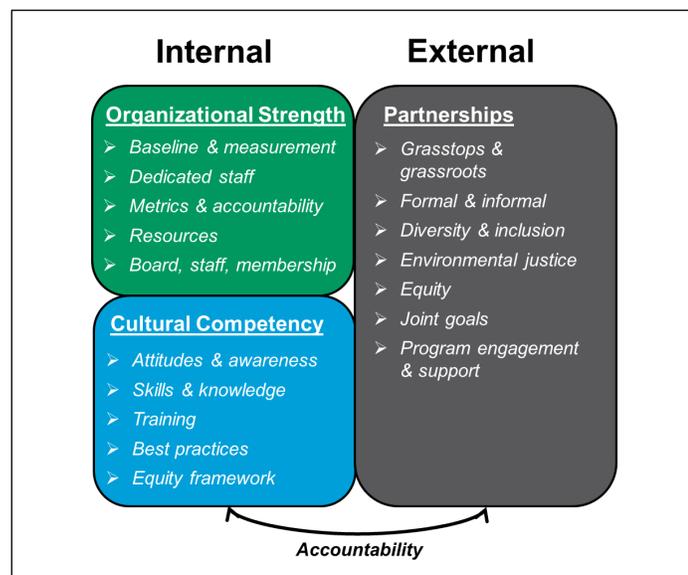
Theory of Change

To remain a global leader in creating innovative solutions to the world’s most pressing environmental problems, EDF needs to adapt to rapidly changing demographics in the US and to shifting socio-economics around the world. EDF will harness the perspectives, skills, and ideas of a diverse workforce, board, and membership, as well as build strong relationships with diverse constituencies to secure meaningful and durable environmental outcomes that are linked to broader societal imperatives.

Critical Components

Three critical components have been identified for achieving the overarching vision of EDF’s Diversity Strategy and are represented in the figure on the right. They include:

1. Organizational Strength
2. Cultural Competency
3. Diverse Constituent Partnerships



Organizational Strength refers to the skillsets and mindsets that allow EDF to effectively work with diverse constituencies, both internally and externally, with appropriate resources, programs, structures, and accountability systems that let us track progress over time.

Milestones

Overarching milestone: EDF is demonstrating continuous improvement in the diversity of our staff, Trustees, and members.

1. An organizational diversity baseline is established against which to measure outcomes and evaluate progress.
2. A full-time, high level Diversity officer is hired, who has support from the Executive team and access to staff and Trustees.
3. Diversity measures are developed, and are incorporated into executive performance and accountability systems.
4. Significant resources are invested in supporting implementation of the Diversity Strategic Plan.
5. Career advancement opportunities are accessible and transparent to all staff, enhancing our ability to attract and retain a more diverse Executive Team and senior staff.

Tactics¹

1. Develop a baseline study of the organization including:
 - a. % people of color hired (including fellows and interns);
 - b. % people of color in short lists for hiring, promotion, and board pipeline;
 - c. retention rates;
 - d. budget and programs explicitly dedicated to retention of diverse individuals; and
 - e. how EDF is perceived externally, both within and beyond the environmental sector.
2. Secure dedicated staff, including a dedicated Diversity officer, to lead and implement the diversity strategy.
3. Expand Development's capacity to identify and engage more diverse donors and prospects in support of EDF's overall strategic plan and the diversity strategic plan, specifically.
4. Maintain existing diversity via regular retention analyses to determine where improvement is needed.
5. Improve diversity in EDF's hiring process through:
 - a. expanding the pool of diverse candidates,
 - b. removing biases in job descriptions,
 - c. providing necessary training for hiring managers, and
 - d. conducting regular reviews of program and departmental hiring processes.
6. Create accountability through:
 - a. inclusion of diversity milestones in the department and program goals, with regular reviews through Ops Reviews and at program/department retreats;
 - b. inclusion of measurable diversity goals in all managers' performance goals and evaluations; and
 - c. updates from Diversity officer to Trustees at Board meetings, as appropriate.
7. Diversify the board by increasing representation of people of color and younger candidates in the Board pipeline.
8. Diversify membership and online activist population to better reflect the demographics of the nations in which we work.

¹ NOTE: Tactics for each critical component are organized in order of priority. For further detailed recommendations, metrics, and critical considerations, see individual sections in the complete strategic plan document. Organizational Strength tactics can be found in [TABLE 1](#).

Cultural Competency is possessing the awareness, attitude, knowledge, and skills needed to understand and effectively interact with people across diverse cultures and backgrounds. More specifically, it is an individual's:

- **Awareness** of one's own worldview and its impact on both interpersonal and cross-cultural interactions with others,
- **Attitude** about beliefs, cultural differences, and people who are different,
- **Knowledge** about different cultural practices and worldviews, and
- **Skills** in communicating across differences, including gestures and other forms of non-verbal communication that vary across cultures and backgrounds.

Milestones

Overarching milestone: All staff are trained in diversity and inclusion, including through refreshers for current staff and on-boarding for new staff.

1. A baseline study about staff attitudes and experiences has been conducted, with follow-up studies completed 1, 3, and 5 years later.
2. A training program and experiential learning opportunities on diversity and inclusion are developed and implemented for US staff, and country-specific training is provided for international staff.
3. Other environmental institutions begin identifying EDF as a leader on diversity and approaching EDF for best practices related to integrating diversity into their organizations.
4. In 3-5 years, EDF is engaged with cross-sector and multi-issue work that is achieving positive environmental and equity outcomes.

Tactics²

1. Conduct a baseline study, and follow-up studies, to assess staff awareness, attitudes, knowledge, and experiences related to diversity, to understand in which areas and how staff need support to develop attitudes of inclusion and solidarity, as well as how these attitudes change and develop over time.
2. Train all staff on diversity and inclusion, with support from third party consultants/experts and guidance from Diversity officer and staff.
3. Establish an on-boarding program in diversity and inclusion for new staff.
4. Maintain and support the EDF Diversity Committee to champion training, encourage staff engagement, and promote values of inclusion and diversity within the staff.
5. Develop a living, online resource library to compile information on upcoming trainings, best practices, tools, and other resources to build institutional knowledge.
6. Develop program-specific training and experiential learning opportunities to equip staff for collaboration with new, diverse strategic partners, on an as-needed basis.
7. Develop country-specific cultural competency on-boarding and training programs for all international staff and staff working with international partners.
8. Incorporate an equity framework that assesses social equity outcomes into planning and decision making for all major projects and policy initiatives.

² Cultural Competency tactics can be found in [TABLE 2](#).

Diverse Constituent Partnerships involve an agreement with grassroots and/or grassroots organizations to share resources and mutually accomplish a goal important to both parties, while enhancing inclusivity and equity outcomes.

- A formal partnership may involve a memorandum of understanding (MOU) that outlines organizational roles, staff time, and allocation of funds or other resources.
- Informal partnerships do not require MOUs, but may have a work plan to outline the goals of the partnership. The goals may be broad, such as relationship building, or more narrowly defined to include specific outcomes and tasks. Staff time, expertise, and other resources are required.

Milestones

Overarching milestone: EDF is engaged in substantive grassroots and grassroots partnerships with diverse constituencies, including environmental justice communities, across our four program areas: Climate, Oceans, Ecosystems, and Health.

1. EDF has dedicated financial and human resources to support both formal and informal partnerships.
2. Each program has a tailored process for systematically identifying and cultivating new, strategic partners among diverse constituencies and with organizations that are unconventional environmental allies.
3. Diverse constituent partnerships in each program have clearly defined joint goals that are tied to EDF's programmatic goals, and programs are responsible for demonstrating progress in these collaborations, *as outlined in the Organizational Strength section of this document.*
4. Program staff working with diverse constituent partners have received the training necessary to work effectively with new partners, *as outlined in the Cultural Competency section of this document.*

Tactics³

1. Train and equip staff to cultivate strong, long-term, collaborative relationships and trust with potential partners. This includes the tools, protocols, and resources necessary to create productive partnerships with grassroots and grassroots entities (*see Cultural Competency*).
2. Analyze and define diverse constituent partnership needs on a program-by-program basis.
3. Develop program-specific criteria for regularly and systematically identifying potential new diverse constituent partners that can be strategic allies.
4. Incentivize programs to build strong working relationships with national political and grassroots advocacy groups representing a wide range of diverse constituencies, particularly ethnic, socio-economic and generational constituencies.
5. Support cross-cutting teams (eg. Development, MarComm, OCS, OEPA, CFO, Chief Counsel, etc.) in engaging non-traditional and new diverse constituents beyond program-specific partnerships (e.g. Latino-serving media outlets; racially diverse major donors, etc.).

³ Diverse Constituent Partnerships tactics can be found in [TABLE 3](#).

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Glossary of Terms

Several terms are used throughout this document, and have been used in discussion related to diversity as a strategy, that may need clarification. While the purpose of this glossary is not to establish definitive or authoritative boundaries for this terminology, it is provided to establish a starting point for dialogue around these terms and to help ensure EDF staff have a shared understanding on their meaning for purposes of this document and the organization. For questions regarding these terms, please contact the Diversity Committee.⁴

Cultural competence: Knowledge, awareness and interpersonal skills that allow individuals to increase their understanding, sensitivity, appreciation, and responsiveness to cultural differences and the interactions resulting from them. The particulars of acquiring cultural competency vary among different groups, and they involve ongoing relational process tending to inclusion and trust building. (UC Berkeley Initiative for Equity, Inclusion, and Diversity)

Diversity: Diversity includes all characteristics and experiences that define each of us as individuals. A common misconception about diversity is that only certain persons or groups are included under its umbrella, when in fact, exactly the opposite is true. Diversity includes the entire spectrum of dimensions of an individual, including Race, Ethnicity, Gender, Age, Religion, Disability, and Sexual orientation. In addition, communication style, work style, organizational role/level, economic status, political orientation, and geographic origin (e.g., East, Midwest, South) all are dimensions of diversity. It is a simple fact that each of us possesses unique qualities along each of these dimensions. Experience and recent research indicate that when recognized and valued, diversity enhances individual productivity, organizational effectiveness, and sustained competitiveness. (US Department of Commerce)

Durable: Able to resist wear, decay, etc., well; lasting; enduring. (Webster Dictionary) In the context of the Diversity Strategic Plan, we aim to create solutions that are long-lasting.

Environmental Equity: An ideal of equal treatment and protection for various, racial, ethnic, and income groups under environmental statutes, regulations and practices applied in a manner that yields no substantial differential impacts relative to the dominant group and the conditions so created. Although environmental equity implies elements of "fairness" and "rights". It does not necessarily address past inequities or view the environment broadly, nor does it incorporate an understanding of the underlying causes and processes. (Concerned Citizens of Tillery)

Environmental Justice: The right to a safe, healthy, productive, and sustainable environment for all, where "environment" is considered in its totality to include ecological (biological), physical (natural and built), social, political, aesthetic, and economic environments. Environmental justice refers to the conditions in which such a right can be freely exercised, whereby individual and group identities, needs, and dignities are preserved, fulfilled, and respected in a way that provides for self-actualization and personal and community empowerment. This term acknowledges environmental "injustice" as the past and present state of affairs and expresses the socio-political objectives needed to address them. (Concerned Citizens of Tillery)

Equality: Evenly distributed access to resources and opportunity necessary for a safe and healthy life; uniform distribution of access to ensure fairness. (Karnich)

⁴ Note: Definitions for many of these terms already exist and are in use beyond EDF. Instead of redefining terms for ourselves, the Working Group has borrowed many these definitions from a glossary made by the diversity coordinator of Sierra Club who generously shared some of their planning documents with us. A full list of citations is located in Appendix F and the Sierra Club document can be found on the Diversity Committee Project Space.

Equity / Equitable: The guarantee of fair treatment, access, opportunity, and advancement while at the same time striving to identify and eliminate barriers that have prevented the full participation of some groups. The principle of equity acknowledges that there are historically underserved and underrepresented populations and that fairness regarding these unbalanced conditions is needed to assist equality in the provision of effective opportunities to all groups. (UC Berkeley Initiative for Equity, Inclusion, and Diversity).

Ethnicity: A social construct which divides people into smaller social groups based on characteristics such as values, behavioral patterns, language, political and economic interests, history, and ancestral geographical base. (Adams, Bell and Griffin)

Gender: The socially constructed ideas about behavior, actions, and roles a particular sex performs. (The National Multicultural Institute)

Grassroots: A movement that develops organically at a local level before spreading throughout the state and even the country. A true “grassroots movement” isn’t organized by political forces - instead, a “grassroots movement” springs up spontaneously due to some pressing issue that a community feels needs to be changed or enhanced.

Grasstops: Grasstops are activists or members of an organization or geographic area that have a high professional and/or public profile, may be part of the “political family” for a decision maker, and can raise public attention or influence decision makers through established connections. For example, an organization’s board members and founders, community leaders, and nationally recognized individuals (including experts, professionals, etc.) constitute potential grasstops advocates. Grasstops advocates can reinforce grassroots action, move an issue into the spotlight, and carry a message between the general public and more powerful targets. (Smart Growth America)

Hispanic: The U.S. Census Bureau defines Hispanic as people who classified themselves as Spanish, Hispanic, or Latino categories, which also included the subgroups Mexican, Mexican American, Chicano, Puerto Rican or Cuban. (The National Multicultural Institute)

Inclusion: The act of creating environments in which any individual or group can be and feel welcomed, respected, supported, and valued to fully participate. An inclusive and welcoming climate embraces differences and offers respect in words and actions for all people. (UC Berkeley Initiative for Equity, Inclusion, and Diversity)

Latino/a: Individual living in the United States originating from, or having heritage relating to Latin America. (University of Maryland)

Minority: A minority group is a sociological category within a demographic. Rather than a relational "social group", as the term would indicate, the term refers to a category that is differentiated and defined by the social majority, that is, those who hold the majority of positions of social power in a society. Racial and ethnic minorities are usually defined as Asian American, Black or African American, Hispanic or Latino, Native Hawaiian and Other Pacific Islander, American Indian and Alaska Native.

People/Person of Color: Is not a term that refers to real biological or scientific distinction between people, but the common experience of being targeted and oppressed by racism. While each oppressed group is affected by racism differently and each group maintains its own unique identity and culture, there is also the recognition that racism has the potential to unite oppressed people in a collective resistance. For this reason, many individuals who identify as members of racially oppressed groups also claim the political identity of being People of Color. This in no way diminishes their specific cultural or racial identity; rather it is an affirmation of the multiple layers of identity of every individual. This term also refrains from the subordinate connotation of triggering labels like “non-White” and “minority.” (Office of Racial and Ethnic Concerns of Unitarian Universalist Association)

Privilege: Power and advantages benefiting a group derived from the historical oppression and exploitation of other groups. (University of Maryland)

Race: A social construct that artificially divides people into distinct groups based on characteristics such as physical appearance, ancestral heritage, cultural affiliation, cultural history, ethnic classification, and the political needs of a society at a given period of time. (Adams, Bell and Griffin)

Racial and Ethnic Identity: An individual's awareness and experience of being a member of a racial and ethnic group; the racial and the ethnic categories that an individual chooses to describe him or herself based on such factors as biological heritage, physical appearance, cultural affiliation, early socialization, and personal experience. (Adams, Bell and Griffin)

Racial Equity: The condition that would be achieved if one's racial identity no longer influenced how one fares. Racial equity is one part of racial justice and must be addressed at the root causes and not just the manifestations. This includes the elimination of policies, practices, attitudes, and cultural messages that reinforce differential outcomes by race or fail to eliminate them. (Center for Assessment and Policy Development)

Racism: Individual and institutional practices and policies based on the belief that a particular race is superior to others. This often results in depriving certain individuals and groups of civil liberties, rights, and other resources, hindering opportunities for social, educational, and political advancement. (The National Multicultural Institute)

Social Justice: A vision of society in which the distribution of resources is equitable and all members are physically and psychologically safe and secure. Social justice involves social actors who have a sense of their own agency as well as a sense of social responsibility toward and with others and the society as a whole (Adams, Bell and Griffin)

Solidarity: "Solidarity is not charity, it is mutual aid between two forces pursuing the same objective." (Samora Machel – as told via Van Jones)

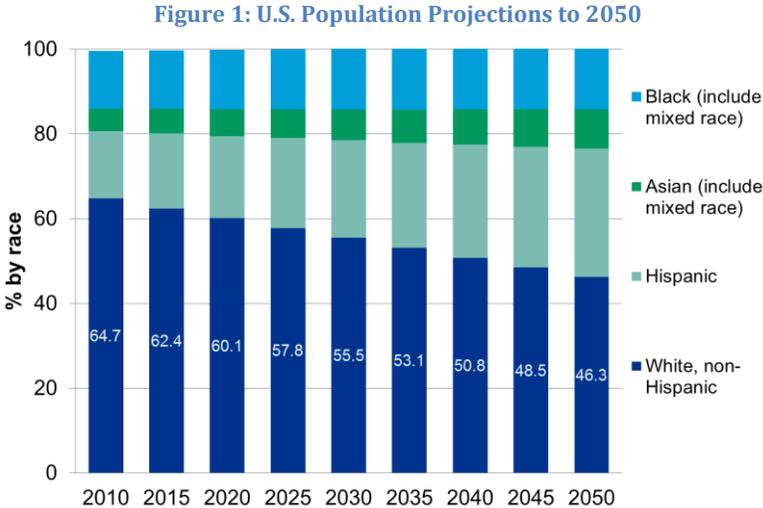
Report Overview

This document details the strategies and tactics recommended for Environmental Defense Fund to become a more diverse and inclusive organization, both in the internal make up of our staff, Trustees, and members, and in the external constituencies with whom we collaborate to reach our organization’s ambitious goals. The working group offers the recommendations in this document to be considered and incorporated into EDF’s 5 year strategic plan, with goals and milestones set to be achieved by 2020. The Diversity Strategy and recommendations have been shared with Trustees, approved by the Executive team, and shared with staff for feedback. These recommendations have been given to EDF’s Executive team for implementation and management.

Background

We believe EDF will be better able to achieve our goals by engaging a more diverse array of individuals and organizations as staff, Trustees, partners, members, and advocates for our policy positions.

This belief is grounded in the realities of changing national demographics and of an increasingly globalized and interconnected world. In 2011, more than half of the children in the United States were born to “minorities” for the first time.⁵ Between 2000 and 2010, over half (56%) of the nation’s population growth was among Latinos, and in 2014 California joined New Mexico as a majority-Latino state. Estimates suggest that sometime between 2040 and 2045, a majority of the American population will be people of color. These changes are already impacting the political realm. In 2012, Republican presidential nominee Mitt Romney won the white vote by 16 points, but lost voters of color by 56 points. The power of the youth vote was similarly pronounced: President Obama tallied 60% of the 18-to-29-year-old vote nationally. As a result, Romney lost the general election by 4%



SOURCES: U.S. CENSUS BUREAU, ASSOCIATED PRESS, REUTERS, WASHINGTON POST
Figures do not equal 100 percent because of rounding. Not all ethnic groups are shown.

⁵ Source: <http://infographicsmania.com/historic-shift-in-us-demographics>

To remain a global leader in creating innovative solutions to the world's most pressing environmental problems, EDF must adapt to and include a larger base of the increasingly diverse constituencies that share our goals and that are affected by our work. Recent polls from organizations including League of Conservation Voters, Green for All, Sierra Club, and National Council of La Raza continue to find that young people and people of color tend to strongly support environmental policies. Indeed, today it is clearer than ever that EDF must better and more meaningfully engage a diverse group of constituencies to achieve our domestic environmental goals.

International Work

While the majority of our work is based in the U.S., EDF is growing our presence overseas. For example, our Climate and Energy work continues to expand in China and India, while our Oceans program is quickly expanding to international fisheries in Indonesia, the Philippines, and Belize, among others.

As our work expands and responds to increasing diversity both nationally and internationally, we believe EDF must become an organization that better reflects the diversity represented by the constituencies and partners with and for whom we work. While this strategy document primarily addresses our U.S.-based work, we have identified our international work as an important area for further structured consideration and have provided some general recommendations. As we expand our work internationally, understanding the various cultures in the countries in which we work will help us better engage with key constituencies to achieve shared goals.

Environmental Justice

In the U.S., environmental justice (EJ) groups continue to grow and to provide important voices in the environmental movement. These groups advocate for environmental improvements on behalf of those who have traditionally been the most impacted by environmental contamination. While EDF is not an environmental justice organization, our recommendations seek to better and increasingly engage with EJ groups over time as part of our Diverse Constituent Partners goals.⁶

Methodology

While this document officially outlines EDF's first Diversity Strategy, the topic of diversity at EDF is not new. Many diversity related initiatives have been underway at EDF for several years, including EDF's staff-run Diversity Committee and the Environmental Justice Committee of the Board.

This strategy document is the culmination of a multi-year effort by both committees. The first steps toward developing an official Diversity Strategy began in June 2012 when members of the Diversity Committee presented the business case for diversity at EDF's All Staff Retreat. Subsequent presentations and discussions with the Board's Environmental Justice Committee

⁶ See Diverse Constituent Partnerships recommendations on pp. 21, with specific tactics in [TABLE 3](#).

and a boarder group of Trustees led to a formal process to incorporate diversity into EDF's overall strategic planning process.

In March 2014, Vice President of Programs Gwen Ruta recruited three co-chairs to help manage a formal strategic planning process. A Working Group of 21 members from across the organization, mostly members of the Diversity Committee, was formed to develop the strategy and recommendations outlined in this document.⁷ The methods used to develop the enclosed recommendations included:

- The articulation of planning principles to ensure a sound strategy:
 - **Comprehensive:** Instead of ad hoc efforts, ensure the plan is as complete as possible, incorporating thinking into how we diversify staff, Board and members.
 - **Measurable:** Like the rest of the milestones for EDF's organization-wide strategic plan, for diversity as a strategy to have legs, activities need to show progress and be measurable.
 - **Accountable:** We must follow through with the initiatives we set forth. This means commitment from the top to make sure that the organization is providing the support and resources needed to meet the goals set forth in the plan, and that those who implement the plan are showing measurable results.
 - **Integrated:** Ensure there is integration across all vertical components of EDF's organization-wide strategic plan. In order for the Diversity Strategy to be successful, the plan needs to compliment or serve program goals.
 - **Focused** - Achieving diversity as a part of EDF's strategy is not something that will happen overnight, nor something that will culminate in the next 5 years. It's a long-term and evolving journey, and we are realistic about our starting point and the work we have in front of us. Given that, the first Diversity Strategy must remain focused on what we start with first.
- Conducting academic research and a literature review to identify best practices.⁸
- Using the *Playing to Win*⁹ format, which EDF elected to use for its 2015-2020 strategic plan.
- Conducting external interviews with experts in fields related to diversity, equity, and inclusion. These interviews included individuals working on diversity at environmental organizations, within companies, or as consultants.¹⁰
- Conducting internal interviews with EDF staff and program Vice Presidents.
- Multiple iterations of developing critical components in sub-groups of the Working Group.
- Meeting weekly as a full working group and as sub-groups.
- Engaging with the Executive team and Board members multiple times to vet drafts of the strategy document and to receive and incorporate feedback.

For an archived list of documents developed by the Working Group, please visit the [Diversity Committee Project Space](#) or contact the Diversity Committee Co-chairs for access.

⁷ See Appendix A for full list of working group members

⁸ A summary of the literature review can be found in Appendix B.

⁹ The *Playing to Win* format is a strategy framework developed by Proctor and Gamble's CEO A.G. Lafley.

¹⁰ A summary of external interviews can be found in Appendix C.

Conclusion

The remainder of this document contains the Diversity Strategy Working Group's detailed recommendations for integrating diversity goals into our 5-year Strategic Plan, emerging from 6 months of planning, discussion, strategizing, writing, and revising. The document contains:

- The organization's overall vision, goal, and theory of change for achieving greater diversity both internally and in our externally-facing work.
- The Working Group's critical components of the Diversity Strategy and recommendations for specific milestones, tactics, and metrics for achieving our goals.
- Recommendations from the Working Group regarding who will have ownership over achieving specific tactics.
- Suggestions and other critical considerations for implementation and management of the diversity strategy.

Diversity Strategic Plan Context

Vision

A world in which people from all backgrounds and experiences feel connected to the environmental challenges we face, and are engaged in the process of creating and implementing durable, equitable solutions.

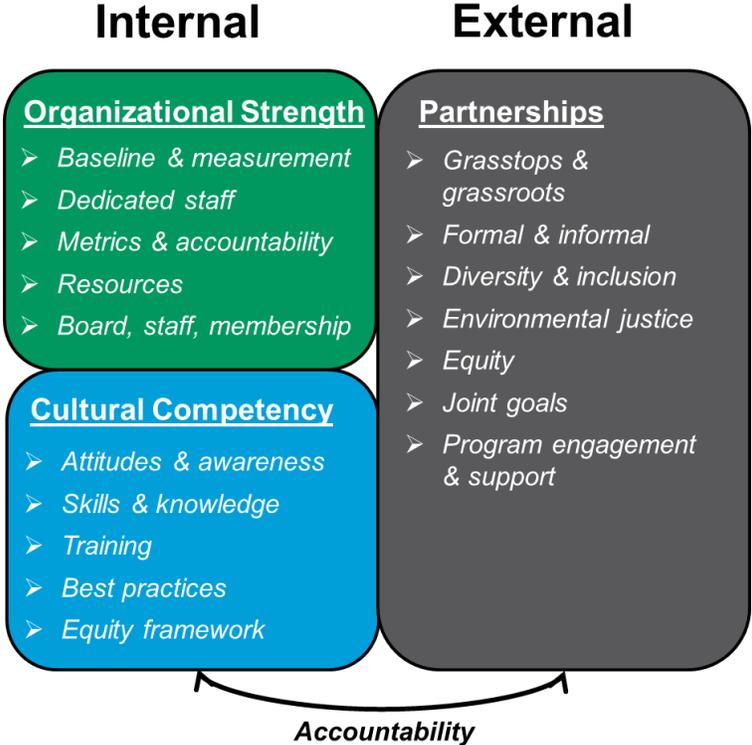
Goal

Cultivate and attain the internal mindsets and capabilities needed to become a culturally competent organization. Externally, increasingly forge diverse, inclusive, and collaborative partnerships rooted in common aspirations and values, aimed at collectively tackling the world's most serious environmental problems.

Theory of Change

To remain a global leader in creating innovative solutions to the world's most pressing environmental problems, EDF needs to adapt to rapidly changing demographics in the US and to shifting socio-economics around the world. EDF will harness the perspectives, skills, and ideas of a diverse workforce, board, and membership, as well as build strong relationships with diverse constituencies to secure meaningful and durable environmental outcomes that are linked to broader societal imperatives.

Critical Components



Critical Components Overview

The critical components of EDF's diversity strategic plan are the overarching categories of work that will enable EDF to achieve the organization's Goals for diversity, as well as to contribute to a broader Vision for diversity in environmental advocacy. The Working Group identified three critical components: Organizational Strength, Cultural Competency and Diverse Constituent Partnerships.

Component 1: Organizational Strength

Definition:

Organizational strength refers to the skillsets and mindsets that allow EDF to work effectively with diverse constituencies, both internally and externally, with appropriate resources, programs, structures, and accountability systems that let us track progress over time.

Desired outcome:

In 5 years, EDF is an organization that values and works effectively and respectfully with diverse groups, so new collaborators from varied fields and experiences come to EDF to work toward shared goals.

Milestones:

Overarching milestone: EDF is demonstrating continuous improvement in the diversity of our staff, Trustees, and members.

1. An organizational diversity baseline is established against which to measure outcomes and evaluate progress.
2. A full-time, high level Diversity officer is hired, who has support from the Executive team and access to staff and Trustees.
3. Diversity measures are developed, and are incorporated into Executive performance and accountability systems.
4. Significant resources are invested in supporting implementation of the Diversity Strategic Plan.
5. Career advancement opportunities are accessible and transparent to all staff, enhancing our ability to attract and retain a more diverse Executive team and senior staff.

Recommended tactics and critical considerations, in order of priority

The working group recognizes that our international work is expanding and an important area with regard to diversity; however, the below table of tactics focuses mainly on our domestic work. We recommend further structured consideration of international tactics and how it contributes to our organizational strength within the context of a globally expanding program.

TABLE 1: ORGANIZATIONAL STRENGTH CRITICAL COMPONENT TACTICS

Tactic	Metrics	Proposed Owners	Critical Considerations
<p>1. Develop a baseline study of the organization, including:</p> <ul style="list-style-type: none"> • % people of color hired (including fellows and interns); • % people of color on short lists for hiring, promotion, and Board pipeline; • Retention rates; • Budget and programs explicitly dedicated to retention of diverse individuals; • How EDF is perceived externally, both within and beyond the environmental sector 	<ul style="list-style-type: none"> • Baseline study conducted. • Follow-up studies conducted at 1, 3, and 5 years. • Baseline used to index success over time. For instance: boost our retention rate of people of color by at least X% at year 5 compared to baseline measurement. • Improvement in how EDF is perceived vis-à-vis diversity over time. 	<ul style="list-style-type: none"> • HR, with support from Diversity officer and the Diversity Committee 	<ul style="list-style-type: none"> • The baseline is essential to all three Critical Components of the Diversity strategy. • The baseline study and follow-ups should be designed and conducted in partnership with third-party experts to ensure credibility and objectivity. Also, consider looking to see if we have a benchmark organization (e.g. Sierra Club). And consider looking into how we achieve gender parity in terms of exec team – how did we get here and how do we compare to other orgs? Was this deliberate? • Understand the make-up of EDF’s staff, fellows, interns, hiring, retention rate and drivers (i.e., why people stay vs. leave), resources, project work, boards, trustees, and membership. • Results should be used to further refine metrics associated with training and other tactics to ensure efficacy. • Response rate is likely to be higher if it is endorsed by the President/Board. • Baseline can be used to define diversity characteristics to target in the strategy (e.g., % of managers who are people of color). • How EDF is perceived externally could be measured via innovative metrics such as: <ul style="list-style-type: none"> ○ Number of hits from diverse media outlets. ○ Hiring a consultant to evaluate this specifically. • While increasing diversity in our workforce will be an important factor in how EDF is perceived externally, this advantage should not eclipse proper evaluation of merit

Tactic	Metrics	Proposed Owners	Critical Considerations
<p>2. Secure dedicated staff, including a dedicated Diversity officer, to facilitate implementation of the diversity strategy.</p>	<ul style="list-style-type: none"> • High level staff member (Diversity Officer) hired to implement and oversee EDF’s Diversity Strategy. • Institutional infrastructure created to support the Diversity Officer, including formal channels of communication and accountability throughout the organization. 	<ul style="list-style-type: none"> • Executive Team (securing dedicated officer) • Diversity Officer with support from HR, Managers, Diversity Committee (implementation) 	<p>in an individuals’ advancement at EDF.</p> <ul style="list-style-type: none"> • The Diversity Officer: <ul style="list-style-type: none"> ○ must have authority; this is <i>not</i> a token position. ○ is essential for success of the overall Diversity Strategy, particularly the Cultural Competency component. • The role and seniority of the Diversity Officer should be regularly evaluated to ensure position is set up for success to implement the plan.
<p>3. Expand Development’s capacity to identify and engage more diverse donors and prospects in support of EDF’s overall strategic plan and the diversity plan, specifically.</p>	<ul style="list-style-type: none"> • # of funding streams supporting and developing diversity initiatives, including an Innovation Fund. 	<ul style="list-style-type: none"> • Development • Diversity Officer • Executive Team 	<ul style="list-style-type: none"> • The Innovation Fund <ul style="list-style-type: none"> ○ involves risk-taking (pilot projects may fail) whereas other funds continue and build successful existing programs. ○ cuts across all of the Diversity Strategy’s critical components. ○ consists of dedicated funds raised by Development/Executive team/Board and funds committed by programs ○ does not replace the responsibility of programs or departments to also incorporate diversity initiatives into their central program goals and fundraising. • Consider developing diversity “champions” in Development, responsible for helping secure resources to develop talent and to fund innovative new projects. • Consider asking donors to fund diversity strategic plan and aim for a certain number of donors who are specifically funding diversity initiatives. • Individual programs should assess both their needs and context to identify diversity initiatives from which they can benefit. • Funding could include pass-through grants to local groups and training for staff in specific areas not covered by all-staff diversity trainings (<i>see Cultural Competency</i>)

Tactic	Metrics	Proposed Owners	Critical Considerations
<p>4. Maintain existing diversity via regular retention analyses to determine where improvement is needed.</p>	<ul style="list-style-type: none"> • Increased rate of retention and career advancement of diverse junior staff. • Trainings for managers to implement retention analysis. • Regular surveys conducted of staff perceptions of EDF as an employer and of the inclusivity of EDF colleagues. 	<ul style="list-style-type: none"> • HR • Diversity Officer 	<p><i>component for more on training).</i></p> <ul style="list-style-type: none"> • Using the survey proposed in the Cultural Competency component, we can determine where improvement is needed, then design and implement improvement plans. • Retaining diverse staff is linked to investing in individualized professional development and opportunities for <i>all</i> staff. • Third-party experts will ensure credibility and objectivity. • Program-specific mechanisms for attracting and retaining diversity may be useful for ensuring diversification of staff across EDF.
<p>5. Improve diversity in EDF's hiring process.</p>	<ul style="list-style-type: none"> • Pool of job candidates expanded through training and support. • Procedures implemented to identify and remove biases in job descriptions. • Training provided for hiring managers. • Regular reviews conducted of program and departmental hiring processes. • Specific indices: % people of color hired in different programs and departments at different levels; % of people of color that made the short-list of candidates and received offers vs. % who chose to accept the offers. 	<ul style="list-style-type: none"> • HR, in collaboration with Hiring Managers • Diversity Officer 	<ul style="list-style-type: none"> • Because improving diversity in the hiring process falls heavily on HR, this department may have specific knowledge needs or recruiting targets, etc. – i.e., may need additional guidance and support to achieve this tactic. • The baseline study and retention analysis will help track progress. • All staff involved in the hiring process should receive training for how to avoid bias in the selection process; HR must enforce these processes and develop guidelines for assessing the diversity of candidate pools before hiring decisions are made. • Consider creating an internal competition between programs and subprograms to share statistics on hiring based on ethnicity and gender, and whether improvements have been made. A little peer pressure can go a long way. • Train managers to believe that it is possible to hire more diverse candidates and that it takes effort and time to achieve. <ul style="list-style-type: none"> ○ One suggestion is to look for candidates outside of Ivy League schools. ○ Another: develop better relationships with public or local schools with greater diversity, e.g: Howard (near DC office), UNC-Chapel Hill (one of

Tactic	Metrics	Proposed Owners	Critical Considerations
			<p>the most SES diverse schools in the country), or UT/Texas State.</p> <ul style="list-style-type: none"> • Ensure that supervisors and hiring managers are both incentivized to have diverse recruiting pools and disincentivized to NOT have them. Accountability for hiring managers is needed. • Hiring of foreign nationals for both our domestic and international work is a question that needs further discussion with HR.
6. Create accountability.	<ul style="list-style-type: none"> • Inclusion of diversity milestones in the department and program goals, reviewed during Ops Reviews, at program/department retreats. • Inclusion of measurable diversity goals in all managers' performance goals and evaluations. • Diversity Officer provides updates to Trustees at Board meetings, as appropriate. 	<ul style="list-style-type: none"> • Board • Executive team • Diversity Officer • Managers • HR 	<ul style="list-style-type: none"> • Everyone affiliated with EDF should be mindful of these goals; over time, a culture must be fostered in which individuals hold themselves accountable for achieving diversity goals, and supervisors and project leaders are encouraged and supported in tracking progress vis-à-vis the staff and processes they manage. • The Working Group recommends that every effort be made for new accountability mechanisms to measure real progress and <i>not</i> to create new burdens for project managers. • Consider incorporating questions or checklists as programs are planning projects and/or in annual reviews - create templates or tools to help manage accountability.
7. Diversify the Board.	<ul style="list-style-type: none"> • Increase percentage of Trustees who are young and who are people of color . • Goals for overall Board makeup are articulated and clear. • Existence of international Boards in countries where EDF operates. 	<ul style="list-style-type: none"> • Executive team • Board • Diversity Officer 	<ul style="list-style-type: none"> • One avenue for identifying diverse Trustee candidates is tapping into the networks of grassroots groups with which we work, to go beyond EDF's extant networks. • This tactic will differ with international and domestic Boards. • A refined "onboarding" process will ensure that new Trustees understand roles and responsibilities, and that existing Trustees are fully introduced to new member perspectives. This could include a Board retreat focused on Diversity. • Consider mentorship of diverse new board members.
8. Diversify domestic and international membership and the online activist	<ul style="list-style-type: none"> • Continuous improvement with regard to Members who are people of color. 	<ul style="list-style-type: none"> • Membership • Diversity Officer 	<ul style="list-style-type: none"> • Develop economically efficient ways to acquire new members or to support membership diversification that may have a lower ROI or longer term pay-off.

Tactic	Metrics	Proposed Owners	Critical Considerations
<p>population to better reflect the demographics of the nations in which we work.</p>	<ul style="list-style-type: none"> • Regular surveys that track progress. • Regular member surveys conducted that address inclusion and cultural relevance to determine where improvement is needed. 		<ul style="list-style-type: none"> • Use methods that are not traditional for EDF, such as working with grassroots groups. <ul style="list-style-type: none"> ○ Non-traditional methods may also include publishing more materials in different languages. • Benchmark other NGO member pools to understand where we might be lagging, and meet with those who are leading to learn best practices. • The working group has prioritized membership last, as staff and Trustees are top priority.

Component 2: Cultural Competency

Definition:

Cultural Competency is possessing the awareness, attitude, knowledge, and skills needed to understand and effectively interact with people across diverse cultures and backgrounds. More specifically, it is an individual's:

- **Awareness** of one's own worldview and its impact on both interpersonal and cross-cultural interactions with others,
- **Attitude** about beliefs, cultural differences, and people who are different,
- **Knowledge** about different cultural practices and worldviews, and
- **Skills** in communicating across differences, including gestures and other forms of non-verbal communication that vary across cultures and backgrounds.

Desired outcome:

By 2020, EDF staff have the internal skills to effectively understand and interact with people across diverse cultures and backgrounds, and EDF as an organization has built the infrastructure and dedicated the resources to ensure this competency is maintained and consistently improved.

Milestones:

Overarching milestone: All staff are trained in diversity and inclusion, including through refreshers for current staff and on-boarding for new staff.

1. A baseline study about staff attitudes and experiences has been conducted, with follow-up studies completed 1, 3, and 5 years later.
2. A training program and experiential learning opportunities on diversity and inclusion are developed and implemented for US staff, and country-specific training is provided for international staff.
3. Other environmental institutions begin identifying EDF as a leader on diversity and approaching EDF for best practices related to integrating diversity into their organizations.
4. In 3-5 years, EDF is engaged with cross-sector and multi-issue work that is achieving positive environmental and equity outcomes.

Recommended tactics and critical considerations, in order of priority

Note: the working group recognizes that our international work is expanding and an important area with regard to diversity; however, the below table of tactics focuses mainly on our domestic work. We recommend further structured consideration of international tactics and how it contributes to cultural competency.

TABLE 2: CULTURAL COMPETENCY CRITICAL COMPONENT TACTICS

Tactic	Metrics	Proposed Owners	Critical Considerations
<p>1. Conduct a baseline study, and follow-up studies, to assess staff awareness, attitudes, knowledge, and experiences related to diversity, to understand in which areas and how staff need support in developing attitudes of diversity, inclusion and solidarity, as well as how these attitudes change and develop over time.</p>	<ul style="list-style-type: none"> • Assessment conducted • Follow-up studies conducted at 1, 3, and 5 years • Within 1st year of study, a plan for addressing additional recommendations/needs identified in study has been proposed, on track for implementation • Attitudes and experiences surrounding diversity become more inclusive and more positive 	<ul style="list-style-type: none"> • Diversity Officer • HR • Diversity Committee 	<ul style="list-style-type: none"> • The baseline study should be designed and conducted in partnership with HR and EDF social scientists to ensure consistency with other initiatives and with third-party experts to ensure credibility and impartiality. • The results of a baseline study should be used to further refine metrics associated with training and other tactics to ensure efficacy. • This baseline study, along with follow-up studies, should also measure and account for staff’s level of comfort developing partnerships or work plans with diversity partners, including assessing what additional support and resources are needed.
<p>2. Train all staff on diversity and inclusion, with support from third party consultants/experts and guidance from Diversity officer and staff.</p>	<ul style="list-style-type: none"> • A cultural competency training program has been created or identified, vetted, and approved for roll out. • All EDF staff have been trained in diversity and inclusion. • Resources or structures needed to continue supporting understanding and action in areas of diversity and inclusion have been 	<ul style="list-style-type: none"> • Diversity Officer • HR • Diversity Committee 	<ul style="list-style-type: none"> • Mobilizing resources for training should be a short-term priority, as well as a long-term investment. • Trainings should be designed in an iterative process in consultation with both staff and external experts to ensure they meet the objective of creating and promoting awareness, positive attitudes, knowledge and skills related to diversity and inclusion (rather than further alienating staff and being counter-productive to diversity goals). • Leaving staff without training and support in improving skills related to diversity and inclusion creates the risk of setting staff up for offensive, ineffective, and inauthentic communications and engagement with diverse partners/audiences.

Tactic	Metrics	Proposed Owners	Critical Considerations
	identified/created for staff.		<ul style="list-style-type: none"> Resources should be allocated to programs to allow staff to pursue outside training to build the cultural competency skills and knowledge necessary for their work, especially if needs are identified that the overall trainings do not address (e.g. like language training). Training in diversity and inclusion is a first step; in the long-term, resources should be secured and mobilized to facilitate experiential learning outside of structured, discrete training opportunities (e.g. work exchanges with locally-based organizations; cultural immersion programs; etc.) Training specifically designed to address environmental justice should also be considered. Look at benchmark organizations and learn from what they have done right and wrong. And continue to utilize diversity committee to hold fun events that may serve dual purpose of training and fun (e.g. potlucks, presentations, brown bags, etc.)
3. Establish an on-boarding program in diversity and inclusion for new staff.	<ul style="list-style-type: none"> A cultural competency on-boarding program has been created or identified, vetted, and approved for roll out. All new staff are on-boarded in diversity and inclusion program, are knowledgeable of EDF's diversity goals, and aware of available resources. 	<ul style="list-style-type: none"> Diversity Officer HR 	<ul style="list-style-type: none"> During implementation, HR and Diversity Officer must be mindful that, if handled inappropriately, this effort could further alienate staff internally and/or hinder our outreach activities externally. <ul style="list-style-type: none"> Notwithstanding, training new staff should prepare staff to avoid offensive, ineffective, and inauthentic communication/engagement both internally and externally. We should enlist help of trained consultants to select and establish the right program for EDF. EDF 101 should continue to incorporate diversity in the presentations. Diversity committee regularly has a session, but make sure design of presentation is updated to include on-boarding program. New staff may benefit from an on-boarding program that recognizes challenges or sensitivities EDF has faced in the past, to help provide context to new employees.
4. Maintain and support the EDF Diversity Committee to champion training, encourage	<ul style="list-style-type: none"> Activity of diversity committee. Engagement level and 	<ul style="list-style-type: none"> Diversity Committee Diversity Officer 	<ul style="list-style-type: none"> Operates similarly to green teams within companies. As of September 2014, the EDF Diversity Committee is composed of 70 members; has several sub-committees

Tactic	Metrics	Proposed Owners	Critical Considerations
<p>staff engagement, and promote values of inclusion and diversity within staff.</p>	<p>initiatives.</p>		<p>dedicated to increasing diversity initiatives and awareness throughout the organization; and sponsors several diversity initiatives including the Tom Graff Fellowship, the Constituency Engagement Award, and internal EJ grants. It will be important to use their energy to encourage the importance and buy-in of diversity initiatives.</p> <ul style="list-style-type: none"> As the Diversity Strategy is implemented, some of the Diversity Committee’s programs may be reimagined to continue complimenting and supporting one another.
<p>5. Develop a living, online resource library to compile information on upcoming trainings, best practices, tools, and other resources to build institutional knowledge</p>	<ul style="list-style-type: none"> A diversity resource landing page has been created and is available to all staff. Communication about the tools is regularly shared and use measured. Staff use and actively contribute to an ever-growing, living library of resources 	<ul style="list-style-type: none"> Diversity Officer Diversity Committee Web Team All staff, as contributors 	<ul style="list-style-type: none"> The Diversity Committee has already begun working on developing a basic skills database in a similar vein. An online resources library should be developed in consultation with programs to best understand their cultural competency gaps and programmatic challenges around diversity. International Climate and Oceans programs have a great deal of experience in this work, particularly in building strong and equitable relationships with diverse partners. They should be used as resources regarding best practices. The Diversity Committee has two sub-committees: 1) the collecting stories and 2) the sharing stories sub-committees that may help in gathering best practices internally throughout EDF. Learn and benchmark from other organizations with Diversity Initiatives on what types of resources work. Determine how or if we want to create a public profile around this work and to what extent we share with other organizations. To hit milestone of being seen as a leader, some type of communication will need to be implemented.
<p>6. Develop program-specific training and experiential learning opportunities to equip staff for collaboration with new, diverse strategic partners, on an as-needed basis.</p>	<ul style="list-style-type: none"> Program-specific trainings have been created or identified, vetted, and approved for roll out. Every program has a specific goal for a diverse constituent partnership and starts a pilot diversity 	<ul style="list-style-type: none"> Diversity Officer HR Program VPs and managers 	<ul style="list-style-type: none"> Resources should be secured and mobilized to facilitate experiential learning outside of structured, discrete training opportunities (e.g. work exchanges with locally-based organizations; cultural immersion programs; etc.) Think about how to formalize partnerships that currently exist but are housed within people, rather than institutionalized. Having the resources (especially financial) to invest and the

Tactic	Metrics	Proposed Owners	Critical Considerations
	<p>partnership in year 1, with specific measurable objectives stated.</p>		<p>staff bandwidth to manage and grow partnerships is critical. It could also be helpful to reframe internal resources as seed money grants so that early-stage project ideas can develop over time. The importance of making pass-through grants to our partners cannot be underestimated, as a way to demonstrate true commitment to the partnership. Without them, we may not be taken seriously.</p> <ul style="list-style-type: none"> • Seek out and communicate any ideas about what a model partnership looks like; with the understanding that partnerships will be unique, it would still be helpful to see a vision for a model partnership.
<p>7. Develop country-specific cultural competency onboarding and training programs for all international staff and staff working with international partners.</p>	<ul style="list-style-type: none"> • Country-specific training programs have been created or identified, vetted, and approved for roll out • All international staff have received cultural competency training. 	<ul style="list-style-type: none"> • Program VPs / managers • Diversity Officer • HR 	<ul style="list-style-type: none"> • The International Climate and Oceans programs may be good resources for ensuring that EDF’s current best practices in this arena are implemented. • Effective cultural competency training will help ensure staff’s security, and help avoid demonstrations of cultural ignorance that could lead to failure in international projects, at worst, or lack of effectiveness at best. • Trainings should prepare staff to avoid offensive, ineffective, and inauthentic communication/engagement both internally and externally. • In the short term, resources should be allocated to programs to allow staff to pursue outside training to build the cultural competency skills and knowledge necessary for their work. • Locally based consultants to support training appropriate to the geographic location are encouraged.
<p>8. Incorporate an equity framework for project assessment (e.g. conducting a standardized Social Equity Impact Assessment (SEIA)) for all major projects and policy initiatives, to ensure positive social equity outcomes</p>	<ul style="list-style-type: none"> • An appropriate SEIA tool is developed • Instances of tool utilization by managers and staff in project and policy planning and assessment 	<ul style="list-style-type: none"> • Diversity Officer • Program VPs / managers 	<ul style="list-style-type: none"> • Note that there is some concern regarding this tactic and associated milestone (#4); some feel this is a fundamental shift from EDF’s core competency, i.e. “We’re an environmental organization, not a social equity organization.” The Working Group feels strongly that the future of the environmental movement does not as easily separate equity concerns from environmental work and has not removed this recommendation. For example, in an interview with Oceans program staff, we heard, “We’re

Tactic	Metrics	Proposed Owners	Critical Considerations
			<p>finding that in growing small scale fisheries around the world, the outcomes we care about and the partners care about are tied directly to human and gender equity issues. Those need to be built into the fabric of our design and we don't know how to do that." Further discussion is encouraged.</p> <ul style="list-style-type: none"> • The SEIA tool should be designed in an iterative process with both staff and external experts to ensure assessments capture critical aspects of equity in project staffing, development, implementation, priorities, and outcomes. • In order for this tool to be effective and utilized regularly, staff must be trained in its use and held accountable to integrating assessment results into project planning as part of their project deliverables and performance evaluations. • Because this may be difficult to implement cross-organizationally, consider piloting on a couple of projects/in a couple of programs before implementing more broadly.

Component 3: Diverse Constituent Partnerships

Definition:

Diversity partnerships involve an agreement with grassroots and/or grassroots organizations to share resources and mutually accomplish a goal important to both parties, while enhancing inclusivity and equity outcomes.

- A formal partnership may involve a memorandum of understanding (MOU) that outlines organizational roles, staff time, and allocation of funds or other resources.
- Informal partnerships do not require MOUs, but may have a work plan to outline the goals of the partnership. The goals may be broad, such as relationship building, or more narrowly defined to include specific outcomes and tasks. Staff time, expertise, and other resources are required.

Desired outcome:

EDF sustains a culture of outreach and engagement with diverse and non-traditional organizations to create formal and informal partnerships around common agendas and shared goals.

Milestones:

Overarching milestone: EDF is engaged in substantive grassroots and grassroots partnerships with diverse constituencies, including environmental justice communities across, our four program areas: Climate, Oceans, Ecosystems, and Health.

1. EDF has dedicated financial and human resources to support both formal and informal partnerships.
2. Each program has a tailored process for systematically identifying and cultivating new, strategic partners among diverse constituencies and with organizations that are unconventional environmental allies.
3. Diverse constituent partnerships in each program have clearly defined joint goals that are tied to EDF's programmatic goals, and programs are responsible for demonstrating progress in these collaborations, *as outlined in the Organizational Strength section of this document.*
4. Program staff working with diversity partners have received the training necessary to work effectively with new partners, *as outlined in the Cultural Competency section of this document.*

Recommended tactics and critical considerations, in order of priority

Note: The Working Group recognizes that our international work is expanding and an important area with regard to diversity; however, the below table of tactics focuses mainly on our domestic work. We recommend further structured consideration of international tactics and how these may contribute to the organization’s overall cultural competency.

TABLE 3: DIVERSE CONSTITUENT PARTNERSHIPS CRITICAL COMPONENT TACTICS

Tactic	Metrics	Proposed Owners	Critical Considerations
<p>1. Train and equip staff to cultivate strong, long-term, collaborative relationships and trust with potential partners (see <i>Cultural Competency tactics 1, 2, 6</i>). This includes the tools, protocols, and resources necessary to create productive partnerships with grassstops & grassroots entities.</p>	<ul style="list-style-type: none"> • Results of EDF’s baseline study (see <i>Cultural Competency</i> section) have identified staff needs for developing successful diversity partnerships. • Resources, including appropriate training, are available to staff to guide them in cultivating relationships with potential partners, and to foster understanding of what makes a successful diversity partnership. 	<ul style="list-style-type: none"> • Diversity Officer • HR • Program Managers 	<ul style="list-style-type: none"> • An organizational culture that is supportive, not bureaucratic in encouraging and making staff accountable to pursue relationships with potential diversity partners will be key to success in this arena. This may include dedicated staff time articulated in job descriptions and/or work plans. • Staff may need to receive professional development training on how to balance time spent on relationship building with expectations for accomplishing other objectives • Criteria for identifying diversity partner candidates should actively prevent aligning EDF with groups that are exclusive or discriminatory, and which would erode the spirit and integrity of EDF’s intentions. <i>See suggested criteria following table (pp. 25).</i> • Like sustainability goals are at companies, the end goal is that diversity is embedded in everything we do. • Ensure that CFO is involved in partnership agreements when large amounts of money are being transferred to partners. The more thoughtful we are about how to write a contract, the better.
<p>2 and 3. Analyze and define diversity needs on a program-by-program basis and Develop program-specific criteria for regularly and systematically identifying potential new diversity partners that are strategic</p>	<ul style="list-style-type: none"> • Program needs are defined. • Criteria and processes are documented and communicated. • Every program has a specific goal for a diverse constituent partnership 	<ul style="list-style-type: none"> • Diversity Officer • Program VPs and managers 	<ul style="list-style-type: none"> • Think about how to formalize partnerships that currently exist but are housed within a few people and are not necessarily institutionalized. • Having the resources (especially financial) to invest and the staff bandwidth to manage and grow partnerships is critical. It could also be helpful to reframe internal resources as seed money grants so that early-stage project ideas can develop over time. The importance of making

Tactic	Metrics	Proposed Owners	Critical Considerations
<p>allies.</p>	<p>and starts a pilot diversity partnership in year 1, with specific measurable objectives stated.</p>		<p>pass-through grants to our partners as way of demonstrating true commitment to the partnership cannot be understated. Without these grants, we may not be taken seriously.</p> <ul style="list-style-type: none"> • Seek out and communicate any ideas about what a model partnership looks like. Understanding that partnerships will be unique, it would still be helpful to see a vision for a model partnership. • Think about reaching to organizations outside of our traditional networks. This is where the innovation fund adds value as the pilot tests can help to diversify our network of networks. • Focus on building scientific partnerships (with academics) first. They are less politically charged and are a way for EDF to establish its credibility, develop relationships and establish a foundation. • Recognize that in many cases relationships are with individuals as opposed to organizations.
<p>4. Incentivize programs to build strong working relationships with national political and grassroots advocacy groups representing a wide range of diverse constituencies, particularly ethnic, socio-economic and generational constituencies.</p>	<ul style="list-style-type: none"> • Relationships with these groups exist • There is a clear, articulated connection between the diversity partnership and EDF’s core program goals and/or strategic milestones 	<ul style="list-style-type: none"> • Diversity officer • Program VPs • Managers • Executive team 	<ul style="list-style-type: none"> • The partnerships should not be about “checking a box;” they should be clearly founded in mutual need to work toward achieving common, strategic objectives. • Clear, thoughtful, and comprehensive analysis should go into the decision to engage with a group on a particular matter. • Specific groups the Working Group recommends we start with include: Latino and Hispanic Americans, African Americans, Asian Americans, Native Americans, EJ communities, more diverse socio-economic communities and youth. The Working Group is listing these particular diverse groups in order to explicitly articulate diverse groups with whom we would like to partner. This is meant to facilitate measuring success moving forward, <i>not</i> to marginalize other diversity communities. • Tap internal knowledge – find people within EDF who have built partnerships and learn from their strategies and experiences.
<p>5. Support offices in cultivating strong working</p>	<ul style="list-style-type: none"> • Local relationships exist where our offices are 	<ul style="list-style-type: none"> • Diversity Officer • Diversity Committee 	<ul style="list-style-type: none"> • Just having a building doesn't make us known, we need to be working locally to build local presence where our

Tactic	Metrics	Proposed Owners	Critical Considerations
<p>relationships with diverse regional and local partner organizations.</p>	<p>located.</p> <ul style="list-style-type: none"> • There is a clear, articulated connection between the diversity partnership and EDF’s core program goals and/or strategic milestones. 	<ul style="list-style-type: none"> • Program Managers 	<p>offices are.</p> <ul style="list-style-type: none"> • Consider consolidating learnings from offices that are doing this well – Austin, Boulder, Raleigh? What best practices can be found? • Diversity officer and committee can help foster resources, internal sharing sessions, etc. for helping to support offices. • How do we balance local interests with global interests? (e.g. California EJ communities that are anti-REDD but supportive of AB32)
<p>6. Allocate resources, including financial and training, for cross-cutting teams (e.g. Development, Marketing, Communications, OCS, OCE) to engage non-traditional and new constituencies in support of diversity partnerships (eg. Latino-serving media outlets; racially diverse major donors, etc.)</p>	<ul style="list-style-type: none"> • Exact resources needed are identified (e.g. could include something like professional translation and tailored media lists are available to program staff for whom diversity partnerships require pursuing non-traditional media outlets.) • Use of resources and impact is tracked. 	<ul style="list-style-type: none"> • Diversity Officer • Program leads 	<ul style="list-style-type: none"> • Originally this tactic had marketing and communications as the main program in mind and the metrics were around how many articles or other news hooks we were able to get into diverse media outlets. But as we thought about it more, it extended to other cross-cutting teams. How can our office of chief scientist, or economists or IT or membership help build partnerships? • Because this is a cross-cutting measure, accountability is always tricky. The Diversity Officer will have to work closely to shepherd it and ensure there are clear goals and metrics.

Suggested Criteria for Prioritizing Diverse Constituent Partnerships

Below are a list of considerations to aid in prioritizing diverse constituent partnerships. This list can be used by each program to assess the strength of a potential partner. The list of criteria is in no particular order, and the lack of fulfillment of any one criterion is not meant to indicate that a partnership should not be pursued.

- ✓ The proposed partnership project and/or the potential partner's mission is aligned with EDF programmatic goals.
- ✓ Although diversity includes the entire spectrum of dimensions of an individual or community, the proposed partnership targets organizations with a focus on environmental justice communities and/or demographics that have been discriminated against on the basis of age, race or ethnicity, socioeconomic status, or gender.¹¹
- ✓ The proposed partnership project is geographically located where EDF is working.
- ✓ The partnership engages individuals or groups who are politically influential or who have the potential to be mobilized for an EDF campaign.
- ✓ The potential partnership represents a demographic that experiences environmental effects that EDF's work may impact. In this case, consideration of whether this demographic is already organized should be considered in order to determine resource needs and feasibility.
- ✓ EDF and the potential partner are open to finding common ground on goal-setting for the project.
- ✓ Opportunities to share staff time and funding are discussed with the potential partner.
- ✓ Potential funders exist for the proposed partnership project, so as to focus on building long lasting relationships, rather than one-off engagements.

¹¹ NOTE: While we are recommending a concerted effort to find EJ or grassroots groups, that is not the only criteria making for a partnership. We must choose groups that are the right partners because of where our work is located, potential influence with key decision makers, shared goals, etc.

Potential Partners Based on Interviews

In the course of our work, the Working Group was asked to identify and recommend a few key partnerships, grassstops and grassroots, for EDF to focus on cultivating over the next five years. Our method to identify these groups was to interview internal program Vice Presidents; brainstorm with them about partners that could help them reach their 5-year strategic milestones; and identify organizations that consistently surfaced for several of the programs.

These interviews allowed the Working Group to capture a lot of valuable feedback (see [Appendix E](#)), but did not lead us to pinpoint a few, specific partnerships to pursue. We recommend that those who implement the Diversity Strategy continue pursuing this effort as a next step related to the Diverse Constituent Partnerships critical component.

The Working Group also recommends that EDF focuses on a handful of diversity “groups” as the organization implements the Diversity Strategy. We recommend this focus to be on ethnic, socio-economic and generational constituencies, particularly Latino and Hispanic Americans, African Americans, Asian Americans, Native Americans, EJ communities, socio-economic communities, and youth.

Conclusion and Next Steps

The Working Group believes that implementing these recommendations will move EDF in the right direction for making meaningful progress on diversity and inclusion, strengthening our capacity to achieve EDF's program goals and creating more comprehensive, effective environmental solutions. In order for this document to be useful, and to make the recommendations actionable, a Diversity Officer who feels ownership over the plan will be necessary.

Below are the immediate next steps proposed for taking this plan from concept to reality:

- Attain final approval of plan from Executive team and Trustees.
- Hire or appoint dedicated personnel (i.e. Diversity officer) to begin operationalizing the plan.
- Ensure dashboard and accountability measures are in place.
- Create an organization-wide communication plan to ensure buy-in from staff.
- Begin execution of plan, including planning for and utilizing FY15 diversity budget to hire consultants and implement diversity and inclusion training.

Appendix A: Diversity Working Group Members

The 21 member Diversity Working Group was assembled in March 2014 and worked through September 2014 to create this document of recommendations. The members of the group are to be commended for their time, passion and commitment to laying the groundwork for EDF's first diversity strategy. The members include:

WG Role	Name	Title	Program
Member	Flip Bernard	Vice President	Human Resources
Member	Millie Chu Baird	Director	Office of the Chief Scientist
Member	Anna Doty	West Coast Policy Associate	US Climate & Energy
Member	Linda-Estefí Méndez	Senior Analyst	Land, Water & Wildlife
Member	Namrita Kapur	Managing Director	Corporate Partnerships Program
Member	Jorge Madrid	California Climate & Clean Energy Campaign Manager	US Climate & Energy
Member	Marilynn Marsh-Robinson	Partnerships & Alliances Manager	US Climate & Energy
Member	Rahel Marsie-Hazen	Marketing Communications Associate	Oceans
Member	Valerie Miller	Specialist, Gulf of Mexico & Southeast	Oceans
Member	Sitar Mody	Senior Manager, EDF Climate Corps Strategy	Corporate Partnerships Program
Member	Lisa Moore	Senior Scientist	Office of the Chief Scientist
Member	Marcelo Norswothy	Transportation Research Analyst	US Climate & Air - Legal and Regulatory Advocacy
Co-Project Manager	Lucía Oliva Hennelly	Campaign Manager, New Climate Partnerships	US Climate & Political Affairs
Member	Virginia Palacios	Research Analyst	US Climate & Energy
Co-Project Manager	Emily Reyna	Senior Manager, Partnerships & Alliances	US Climate & Energy
Member	Rainer Romero	Senior Social Scientist	Office of the Chief Scientist
Executive Lead	Gwen Ruta	Vice President	Executive Office Programs
Member	Sonia Sharan	Program Coordinator	Oceans
Member	Christina Ceballos	Specialist, Domestic Fisheries Research	Oceans
Member	Beth Trask	Director, Natural Gas	US Climate & Energy
High Level Lead	Derek Walker	Associate Vice President	US Climate & Energy

Appendix B: Literature Review

Part I: Trends in internal memos/email on the EDF-Diversity Committee List Serve

- December 2012 onwards
- Key takeaways from readings

Business Case for Diversity

- Increased diversity in elections – voters, candidates. Most diverse Congressional party, but still 80% male/white. (http://www.diversityinc.rsvp1.com/diversity-and-inclusion/most-diverse-congress-sworn-in/?utm_source=Genius&utm_campaign=newsletterLuke&utm_medium=DI&utm_content=2013-02-12)
- Changing demographics of the electorate. Government make-up should also reflect community. Green groups need these demographics' support to win votes. (<https://www.politicopro.com/go/?id=17432> - Greens confront own need for diversity, by Talia Buford)
- Climate change and EJ-community impacts/ minority impacts. Latinos, African Americans, etc. are all interested in climate change issues. To them this is an economic issue, a health issue. (<http://latino.foxnews.com/latino/politics/2013/02/21/poll-climate-change-top-concern-for-latinos/>)
- Environmental movement – all Americans are entitled to clean water, air, and a healthy community.
- Immigrants and the environment. [Jorge Madrid and articles from Center for American Progress]
- EPA, Obama have pushed for a focus on EJ communities.

Best Practices

- Encourage diversity in leadership pipeline. Discuss diversity implicitly – increase transparency with employees, develop junior talent. “Qualified, diverse candidates are not getting due consideration for leadership roles, owing to unconscious (and sometimes conscious) bias in hiring and promotion decisions.” (<http://blogs.hbr.org/2013/08/a-fairer-way-to-make-hiring-an/>)
- Mainstream environmental NGOs too white – how does outreach to communities fit in to EDF priorities. Including EJ NGOs and non-mainstream groups in our conversations and strategies.
- Considering language preferences is important not only for outreach with EDF's specific program communications, but also in understanding the ability of minorities to offer public comment, vote, or otherwise participate as stakeholders who may wish to advocate for public and environmental health. (Virginia in response to her Power Point on Outreach to Minority Landowners; email 5/15/2013)
- Empowering communities to stand up for themselves.

Part II: Review of Emily's Research: Up to 2010

PROBLEMS:

1. The past, current and/or perceived elitist culture of environmental organizations or environmentalists weakens our credibility, impact, and perpetuates exclusivity:
 - Environmental organizations have historically had a greater proportion of white members than the general population, they also are more likely to be middle-class and more highly educated. Studies in the 1990s revealed that leaders of environmental NGOs and their volunteers are predominately white, over 30, male and college-educated. (Taylor, D.E. (2008) Diversity and the Environment: Myth-making and the status of minorities in the field. Research in Social Problems and Public Policy: Equity and the Environment, 15, 89-148.)
 - Lack of diversity, particularly among leaders, is not only a problem in environmental organizations but across non-profits. A Compasspoint study of 2,000 non-profit Executive Directors in 8 cities found that 82% are Caucasian when 67% of the general population is Caucasian and that younger Executive Directors also equally lack diversity. ("Daring to Lead 2006," CompassPoint, The Meyer Foundation, 2006)
 - The separation between environmental organizations and environmental justice groups can lead to the perception that the environmental organizations are biased against low-income and minority groups who are the focus of the environmental justice groups. (Bridging the Black-Green-White Divide: The Impact of Diversity in Environmental Nonprofit Organizations, Pg. 55)
 - Employees of environmental organizations often value progressive policy and social justice but the exclusive culture of the organizations does not reflect those values. If environmental groups do not become more diverse, this disconnect will only become greater as the demographics in the U.S. change and the work of the groups become less successful or authentic. (Diversity and the Future of the U.S. Environmental Movement)
2. Environmentalism has been traditionally framed in a conservation-centric manner leading to the false portrayal that low-income and minority groups are unconcerned with the environment.
 - Past research conducted prior to 1980s -90s examined environmental attitudes, perceptions and participation in environmental activities by minority groups but were biased against the types of activism and activities pursued by these groups and led to the false conclusion that minority groups were occupied with meeting other needs and not concerned with environmental issues. Activism led by minority groups in the past has dealt with land, fishing, and hunting rights, reduction of pesticides and other toxic substances, waste disposal, health, transportation and housing issues. This did not follow the traditional conservation-centric environmentalism and occurred outside of mainstream environmental groups. Although research since the 1980s has highlighted the biases in past research on these issues and broadened the discourse on what environmentalism means these false portrayals still shape perception on minority involvement in environmentalism. (Taylor, D.E. (2008) Diversity and

the Environment: Myth-making and the status of minorities in the field. Research in Social Problems and Public Policy: Equity and the Environment, 15, 89-148.)

3. Structural barriers and lack of perception of structural barriers limit environmental organizations ability to address environmental justice issues and to build a more diverse workforce.
 - Lack of diversity on boards and within leadership of environmental organizations leads to the lack of perception of and engagement in environmental justice issues. (Bridging the Black-Green-White Divide: The Impact of Diversity in Environmental Nonprofit Organizations, Pg. 62)
 - Reliance on existing internal networks and insider referrals for recruitment and hiring minority employees into positions that do not offer advancement opportunities create indirect institutional discrimination. In response to past responses by environmental organizations on the lack of diversity within their workforce studies have demonstrated that there are qualified minority applicants and they are willing to work in the environmental field. These indirect exclusionary practices and the continued traditional framing of environmentalism limit environmental groups' ability to be more diverse. (Taylor, D.E. (2008) Diversity and the Environment: Myth-making and the status of minorities in the field. Research in Social Problems and Public Policy: Equity and the Environment, 15, 89-148.)

KEY ISSUES:

1. Recruitment is integral to diversity efforts
 - Consistently recruiting candidates and members from existing networks limits diversity as people's networks tend to reflect their own race and social background. (Taylor, D.E. (2008) Diversity and the Environment: Myth-making and the status of minorities in the field. Research in Social Problems and Public Policy: Equity and the Environment, 15, 89-148.)
 - EXAMPLE : "Go where the talent is. Recruiting diverse talent is not a passive activity. Nonprofit groups have to be willing to move beyond traditional hiring sources and learn to recruit in different places and use different techniques. To recruit diverse pools of talented people, charities should develop relationships with professional organizations that people of color belong to, post positions on Web sites, newspapers, and other vehicles that reach minorities, and require that search firms provide them with diverse slates of candidates for every opening. Several major corporations, including General Motors and Alcoa, stopped sending recruiters to the University of Wisconsin at Madison because the institution's student body is not diverse. Those corporations concluded that the students would leave college less prepared to deal with a diverse world and without the cultural competence needed to enter a global work force. They chose to spend money at universities with greater diversity. Once an organization has diverse leadership and management in place, it will find that it will be even easier to gain access to networks of minority job seekers and increase the interest of diverse candidates in working for a charity." (Michael Watson, How charities can recruit diverse employees)

2. Leadership and staff in management positions must actively create change to improve internal diversity and cultural competency and support and retain diverse staff.
 - Commitment to diversity must be demonstrated by the board and senior teams through hiring diverse staff at all levels and requiring recruitment to seek diverse candidates. Boards should ask Executives to report on their hiring and retention data along with organizational demographics. (Ramon Del Castillo & John Zalenski. Is your organization culturally competent?) (Michael Watson, How charities can recruit diverse employees)
 - Supervisors must have the management skills to support the needs of diverse team members and foster growth across diverse employees. (Michael Watson, How charities can recruit diverse employees)

3. Cultural and linguistic competency is crucial to the effectiveness of organizations
 - Beyond building diverse and multi-cultural teams, organizations can aim to hire and train culturally sensitive people.
 - Cultural competency will improve planning and communication, building trusting relationships, managing conflict, conducting needs assessments, and framing issues. (Ramon Del Castillo & John Zalenski. Is your organization culturally competent?)

Indicators of effective diversity initiatives:

(From Gardenswartz & Rowe, 1998)

- Good faith effort to recruit, hire, train, and promote qualified employees from under-represented groups.
- Diverse staff at all levels
- Composition of management staff reflects the composition of the work force in general
- Internal networking results in finding qualified candidates from diverse groups
- Mechanisms exist to identify and mentor diverse employees who show promotional potential
- Managers recognize it as their responsibility to make progress in building teams that reflect the composition of the work force
- Turnover among all groups is relatively proportionate
- Employees form friendships across cultural, gender, racial etc. lines
- Employees talk openly about difference in backgrounds, values, needs
- Individuals feel comfortable being themselves
- It would not be surprising if the next CEO/President is not a white male
- Leave, holiday policies are flexible enough for everyone
- Cultural conflicts are resolved and not allowed to fester/escalate
- Employees of all backgrounds feel free to give input and make requests to management
- Diverse employees take advantage of career enhancement opportunities
- Diverse teams work cooperatively
- Productivity of diverse teams is high
- Managers get commitment and cooperation from diverse staff

- Organizational procedures like performance reviews and career development have been restructured to suit the diverse needs of employees

Part III: Review of Recent Literature: 2010-Present

- Used Google Scholar to access journal articles available through EDF's subscription to the International Environment Library Consortium (IELC)
- Keyword Searches in combination of one or more of these words:
 - Diversity, environment, environmental organizations, initiatives, nonprofit, performance

Diversity Drivers

Article: What drives the implementation of diversity management programs? Evidence from public organizations by Pitts, Hicklin, Hawes, & Melton (2010)

Diversity Management Construct:

- Recruitment and retention: strategic plan for recruiting from underrepresented groups (recent research has shown the importance of this), seek out employees from atypical venues, increasing organizational diversity has potential to increase performance and outcomes; greater staff diversity likely to increase innovative solutions and creative approaches to services
- Valuing differences: considers whether employees and managers appreciate the different cultural assumptions and biases that employees bring to their work
- Pragmatic policies: strategic set of management tools that an organization can use to promote employee job satisfaction and performance.

Drivers:

- Environmental uncertainty: related to programs and initiatives more than recruitment and retention; organizations in environments marked by uncertainty may be more likely to adopt and/or implement; programs aimed at managing diversity; programs may come at the result of seeing other organizations do diversity programs and look to get attention from others in the same industry/geography
- Environmental favorability: favors diversity programs but research shows that it does not mean it leads to programs for recruitment/retention; it also does not seem to matter if there are abundant resources (munificence) or not for developing these programs
- Institutional isomorphism: looked at the norms to which the Executive manager is exposed; variables examined showed no significant effects

Diversity & Performance

Article: Recognizing the benefits of diversity: When and how does diversity increase group performance? By Roberge & Van Dick (2010)

Reviewed literature on diversity and performance:

- Based on research on information/decision making suggest that a diverse workforce leads to improved decision-making processes by increasing creativity and innovation, but studies that provide evidence of increased group performance are rare.
- Paper presents some pathways to future research and should be considered throughout our diversity initiative: group performance, complexity of learning, empathy, self-disclosure, communication, group involvement, group trust, collective identity salience, and psychological safety climate

Article: Managing Diversity in US Federal Agencies: Effects of diversity and diversity management on employee perceptions of organizational performance by Choi & Rainey (2010)

Findings:

- Racial diversity is negatively related to employees' perception of organizational performance and perceived lower than other agencies
- Gender diversity (balanced between sexes) is positively related to employees' perception of organizational performance
- When agencies have more effective diversity management policies and practices, they also perform better than others that are less effective at managing diversity.
- The results indicate that higher levels of racial diversity are negatively associated with perceived organizational performance when employees of the agency have longer organizational tenure. In contrast, higher levels of gender diversity tend to increase organizational performance when the employees worked together longer. The moderating effect of tenure on age diversity was not significant.
- The most important evidence of such moderating effects comes from the finding that this very large sample of federal employees perceives lower organizational effectiveness where racial diversity is higher, but strikingly, where they perceive that diversity is effectively managed, perceived organizational effectiveness is higher when racial diversity is greater.

Article: The gender and ethnic diversity of US Boards and Board Committees and firm financial performance by Carter, D'Souza, Simkins, and Simpson (2010)

Abstract:

Research Question/Issue: We examine the business case for the inclusion of women and ethnic minority directors on the board. Specifically, we investigate the relationship between the number of women directors and the number of ethnic minority directors on the board and important board committees and financial performance measured as return on assets and Tobin's Q.

Research Findings/Insights: We do not find a significant relationship between the gender or ethnic diversity of the board, or important board committees, and financial performance for a sample of major US corporations. Our evidence also suggests that the gender and ethnic minority diversity of the board and firm financial performance appear to be endogenous.

Practitioner/Policy Implications: The results of our analysis do not support the business case for inclusion of women and ethnic minorities on corporate boards. However, we find no evidence of any negative effect either. Our evidence implies that decisions concerning the appointment of women and ethnic minorities to corporate boards should be based on criteria other than future financial performance.

- "However, there are reasonable theoretical arguments and empirical evidence that suggest either no effect of board diversity on firm performance or a detrimental effect. Understanding the influence of the gender and ethnic minority diversity of the board of directors on the financial performance of the firm has important implications for top managers, shareholders, corporate boards, and policy makers."
- "Our results suggest that the interaction of gender diversity and ethnic minority diversity do not impact financial performance."
- "First, there is no evidence of a negative link between board diversity and financial performance so that our evidence does not refute the business case for board diversity. Second, we do not find any empirical evidence of causation going from board diversity to financial performance, either positive or negative. We find some evidence of a positive relationship between board diversity and financial performance in the fixed effect regression analysis but this is not evidence of causation."

- Note for EDF's international work: "The choice of gender and ethnicity as important dimensions of diversity is somewhat unique to the US. In other countries, language, or religion may be more important dimensions of diversity that should be explored."

Article: *Diversity management for innovation in social enterprises in the UK* by Bridgstock, Lettice, Ozbilgin, & Tatli (2010)

- Diversity Management (DM): "a management philosophy of recognizing and valuing heterogeneity in organizations with a view to improve organizational performance"
- From a national survey of 285 completed questionnaires of diversity officers across a cross-section of organizations of all sizes, sectors and regions in the UK:
 - A total of 85% of the respondents in the questionnaire survey believed that DM promotes high performance, and
 - 83% of the respondents believed that DM fosters innovation and creativity in their organizations.

Diversity & In/Exclusion

Article: *What about me? Perceptions of exclusion and Whites' reactions to multiculturalism* by Plaut, Buffardi, Garnett, & Sanchez-Burks (2011)

- This article is good to have on hand as a reminder that we are not in this to exclude any particular group
- A 5-study investigation of reactions of dominant group members (i.e., White Americans) to diversity (relative to racial minority reactions) provides evidence of implicit and explicit associations between multiculturalism and exclusion and of a relationship between perceived exclusion and reactions to diversity.
- Purported 'inclusive' ideology of multiculturalism is not perceived as such by Whites. This may, in part, account for the lower support for diversity efforts in education and work settings."

Article: *Jackson Hardiman Model of Social Identity Development*

- Christina found this to complement Sierra Club's resources on Project Space (on file there)
- Info is a pre-cursor to developing a Multi-cultural Organization)

Collective Identity Resources from Linda's presentation (on file)

Book Chapter: *The process of collective identity* by A. Melucci

Article: *Collective identity formation and collection action framing in a Mexican "movement of movements"* by M. Adler (2012)

Article: *Organizing for governance: Building collaboration in Brazilian river basins* by R.N. Abers (2007)

Appendix C: External Interview Synthesis

The Diversity Working Group interviewed the following external organizations and people regarding their diversity strategies. This appendix documents the high level takeaways from these interviews. For a complete list of interviews and the list of interview templates, see the Diversity Committee Project Space.

Organization	Interviewee
Center for Diversity and the Environment	Queta Gonzales
Conservation Law Foundation	Veronica Eady
Former HP diversity, now of Raben Group	Danielle Deane
former Massachusetts Secretary of Executive Office of Environmental Affairs	Jamie Hoyt
FSG	Chloe Fagan-Tucker
National Wildlife Federation	Lisa Madry
Partners Healthcare	Brent Henry
Sierra Club	Eva Hernandez
Sierra Club	Jessica Ronald
SKEO Solutions	Vernice Miller-Travis
Texas Southern University	Dr. Bullard
The Conservation Fund, VP	Mikki Sager

Contents:

1. Toplines
2. Common themes – notes
3. Quotable
4. Additional ideas to note
5. Misc. notes, good ideas, etc.

1. Toplines:

- **Staffing is key**
 - Half interviews called for specific, internal staffer (different takes on what this looks like)
 - Half interviewees had working groups/committees/multiple bodies responsible
- **Buy-in from leadership is critical**
 - Senior leadership, buy-in = critical for success of initiatives
 - Board representation = credibility, change starts at the top, with decision-making, guiding individuals
- **Training is foundational, transformative**
 - Internal cultural competency;
 - For managers to remove roadblocks
 - Sensitizes people about diversity

- ...leads to risk management for the organization
- Promotes identification of intersectionality (with other issues, communities, organizations)
- **The question of environmental justice still stands**
 - Different takes on this:
 - Own who EDF is
 - Be transparent
 - No “one size fits all” for now organizations navigate EJ vs. diversity
 - Everyone is dealing with it differently
- **Challenges**
 - Metrics: goals are big, progress hard to measure
 - Categories of diversity: tackling most relevant groups as 1st step (ie. youth, race)

2. Common themes

- **Staffing is key:**
 - One diversity team representative **in each department** of organization (SC)
 - **Full time staff member** has been instrumental (SC)
 - (UCS-Hoyt) UCS Board Diversity Task Force focused on building a pipeline of talent for staff and board, including an internal grant program
 - (NWF-Mandry) 4 different working groups & committees after visioning session
 - (NWF-Mandry) *Lessons learned, bad practice* Discovered initiatives need to be housed in an official department and decided on HR; hired a new staff member, dismantled group --> fell apart: no one is in charge now [*Note: largely a personality issue—*verify that from the 4/4 WG call*]
 - (NWF-Mandry) Look at networks for recruitment and how HR manages the recruitment/hiring process; include in job descriptions a statement about diversity relevant to the position
 - (NWF-Mandry) Strongly encourages internal staff member to act as a consultant who can help guide programs, departments with cultural competencies
- **Buy-in/leadership from the top is critical:**
 - Diversity team partners with Executive team to ensure **working in lockstep w leadership** (SC)
 - (SC) Organizational change requires **commitment from the most senior levels** of leadership. An Exec Team champion has been a key advocate
 - (Deane) Need diverse staff/Board – without it, can’t build trust with local groups
 - (Eady) 1st step could be diversifying Board and getting ppl involved who have a fiduciary duty and role in directing the organization (12-15%)
 - (UCS-Hoyt) Heading Diversity Task Force of UCS Board; attended Green Group’s Board Members of Color meeting (they are developing a best practices document to be released later this year w/ initial report out in May)

- (UCS-Hoyt) Can't build credible relationships w/out constituencies represented on our Board/staff; conversely, Board/staff members don't want to be isolated or a token --> need attention to building a pipeline: crack this chicken-and-egg problem, be intentional, stick with it, don't be afraid to fail at first
- (NWF-Mandry) Top-level buy-in was essential in the effort and 4 national board members went to National Coalition Building Institute (NCBI) training 09/2013
- **Trainings are foundational, important**
 - (SC) Dismantling racism
 - (SC) Managers go through trainings "since roadblocks often fall on managers"
 - (UCS-Hoyt) One goal of the RFP process is to promote internal cultural competency
 - (NWF-Mandry) Training: very relevant; sensitizes people about diversity; risk management (reduces risk to organizations by ID'ing potential problems w/ partners before they start); helps better understand where money comes from, intersectionality
 - *NCBI includes embracing diversity, cultural competency, and identity, ethnicity, education-level, age, etc; and application/retention of training is most effective
- **Environmental Justice?**
 - (SC) Doesn't consider itself an EJ organization; realizes EJ projects require high-level of relationship building, community mapping, being transparent about what the organization is there for.
 - (Deane) "There's no one size fits all" solution for environmental groups navigating environmental justice, but there needs to be discussion of where there are equity concerns.
 - (Eady) Should EDF assume it's *not* an EJ organization?
 - (Eady) Need to have full transparency
 - (UCS-Hoyt) EJ, diversity, and constituency-building are separate issues.
 - (UCS-Hoyt) Reasonable approach [that EJ is not a driving force]: Stay true to core values and consider integrating diversity into core values; "don't be shy that it fits, but is not a driving force"
 - (NWF-Mandry) NWF doesn't specifically work on EJ, but it's important to reframe the issues for the communities
- **HR takes a lot of ownership(SC)**
 - (Deane) Need to tap other people's networks - otherwise, how will we break the mold, deliver talent from people of color?
 - (Deane) 1st phase is changing the internal demographics of big enviro groups (before more resources to grassroots/EJ groups)
 - Section on **performance evaluations** on Diversity, Equity, Inclusion (SC)
- **Equitable way to diversify funding and bring in donors (Eady)**
 - (UCS-Hoyt) UCS initiatives funded internally, no set amounts (TPL - from unrestricted funds)

- (UCS-Hoyt) Find some way to fund “it” so it has staying power
- **“Culture of overworking”** doesn’t foster the kind of relationship building it takes to build cross-cultural bridges (SC)
 - (Eady) EDF should think about implementing programs in a way that doesn’t have negative repercussions on race, social status, etc.
- **Framework** as a useful reference point
 - (SC) Jackson-Hartiman model
 - (Eady) Visioning should encompass **accountability – takes responsibility**
- **Equity** (SC) (Deane) (Eady)
- **Cross-issue alliances**
 - (SC) recently made a decision to take a hard stance on immigration
 - (Eady) Can support other issues without getting deeply engaged (connections to policy makers, money, media, etc..)
 - Recognize [EDF for what it is] and look for intersectionality, ways to support specific projects

Challenges:

- **Categories in diversity**
 - (SC) focus is on race and age as categories.
 - (Deane) Green 2.0 diversity focus also race and age
 - (NWF-Mandry) Age diversity significant for NWF – insignificant # members <30
- (UCS-Hoyt) Important to have **goals and metrics** – can’t be open-ended
 - (UCS-Hoyt) Reflecting the community at large in terms of staff, senior leadership
 - (UCS-Hoyt) Number of community partnerships
 - (SC) Plans are ambitious, goals are difficult to track

3. Quotable

- “Organizational change requires commitment from the most senior levels of leadership” (SC-Hernandez)
- “The organization also has a requirement that every manager goes through a Dismantling Racism Training, since roadblocks to diversity, equity, and inclusion often fall on managers.”
- “Some people think they are already a multicultural organization... these are the ones that usually need training.”
- “Race was chosen even though it is the hardest to talk about because it is the issue that is going to make the most progress in the organization if they can address it.”
- “With principles of democracy under attack, the Sierra Club sees an imperative to build cross-issue alliances in order to stay strong against those attacks. Building alliances with organizations that are not solely environmental organizations has helped SC to have greater representation in grassroots efforts when they share support at other groups’ events. From an organizer’s perspective, they are given flexibility and encouragement to leverage and support not just what’s relevant to SC but to others.”

- “[SC] looked across other organizations last year when they were redrafting their diversity statement, wondering, Who’s done this right? And really, they don’t think anyone is doing it right; we all have a long way to go!” *[There are a lot of community groups thinking about it, but the cultural shift will take time.]
- (UCS-Hoyt) Other Green Group organizations aren’t that far ahead of EDF, and UCS/TPL are at the same point
- (Deane) “I asked if she could help me think about the relationship between EJ and diversity. She jokingly said if she could answer that succinctly, she’d have it made as a consultant.”
- (SC-Ronald) “Every time we talked about our work when I landed here, it centered around the topic of diversity. I was personally uncomfortable with that because it too easily turs into a head counting game: how many people of X and y identity and how can we get more z to try and *ADD IT UP* to diversity. That sets you up for failure because you are focusing on the wrong ‘result.’
- If you focus on inclusion and equity, you can support diverse perspectives and experiences, but if you start and work only on recruitment you’re going to have a revolving door because you have not looked at your culture: at retention, professional development, and all the things that are important to building a culture of inclusion.”

4. Additional notes

- (Deane) Green 2.0 – pro bono project to address the need for more diversity (esp. race and age) in the environmental movement
- (Deane) annual ‘scorecard’ for environmental groups – idea from Calvert Investments
- (Deane) Lisa Jackson hosting small group for a confidential & candid discussion of the challenges facing these organizations & the movement as a whole + strategy discussion + potential accountability measures.
- (UCS-Hoyt) Consumer brand companies have been relatively articulate at including (1) EJ (2) diversity (3) constituency building into their planning process / vision / frame
- (UCS-Hoyt) Commented that only CEOs from SC, Earthjustice, and NRDC were at Green Group’s Board Members of Color initiative ☑ appearance??
- (NWF-Mandry) Transgender non-discriminatory policy and change in bathroom set-up in offices to be unisex
- (NWF-Mandry) Given that EDF is not alone in thinking about this, should consider finding funding for all enviro. groups: NWF, SC, EDF + others ☑ could build a movement, EDF may be in a position to lead this, share training, share learning.
 - Note: look into Center for Diversity and Environment (good resource)
 - Note: look into Angela Park: ran diversity consulting firm

Appendix D: Diversity Officer Memo

To: Fred Krupp, Diane Regas, Liza Henshaw, Flip Bernard, Carol Kinzler and Gwen Ruta
From: Emily Reyna, Lucía Oliva Hennelly, and Derek Walker
Date: July 28, 2014
Re: Proposed Diversity Officer Position
Attch: Sample job descriptions¹²

This memo addresses the Executive Team's request for more information regarding the Diversity Working Group's recommendation for EDF to create a dedicated position (e.g. Diversity Officer) to implement EDF's strategic plan for diversity.

Why does an organization need a dedicated Diversity Officer?¹³

As EDF's Diversity Committee has outlined in previous documents and presentations, we believe EDF will be better able to achieve our goals, increase our political influence, and grow our organization over time if we engage a more diverse array of individuals as staff, trustees, partners, members, and advocates for our policy positions.

The demographics in the U.S. population are changing rapidly, and advancements in data, technology, and communications are accelerating the challenges that all organizations face. These include navigating both domestic and international diversity, as well as addressing the varied tastes of consumers, global competition, and increased competition for the best talent. Organizations that recognize that inclusion and diversity require commitment for the long haul create a dedicated Diversity position because the classic roles of finance, marketing, human resources, legal, supply change, etc. are **insufficient** to handle this new complexity. A dedicated staff position helps navigate this complexity, supporting an organization in addressing these challenges and harnessing the opportunities they create.

What is the role of a Diversity Officer?

The central role of a dedicated Diversity officer is to provide intellectual leadership, direction, and accountability for an organization's diversity initiatives – not unlike the role played by the Chief Economist or Chief Scientist at EDF or Sustainability Managers in the private sector. Typically, this position develops and manages strategies to improve diversity, which could include initiatives to boost diverse recruitment and increase retention; training in diversity, equity, and inclusion; intentionally cultivating stronger relationships with stakeholders in diverse communities; and developing programmatic goals and initiatives that ultimately contribute to an organization's success.

Most importantly, a Diversity officer engages matters of diversity as a first priority. Although the structures and vertical portfolios of Diversity officers range from basic one-person offices to more complex multi-unit configurations, a number of threads define this emerging role across of the corporate, higher education, health administration, non-profit and other sectors.¹⁴ Essential competencies of effective Diversity officers include¹⁵:

1. Business acumen or in EDF's case, understanding of programmatic work
2. Visionary and strategic leadership
3. Collaborative relationships
4. Influence
5. Large-scale systems change
6. Effective communication
7. Accountability for results

¹² See sample job descriptions on Diversity Committee Project Space

¹³ Berry, Philip. [Diversity & Inclusion Insights: The Diversity Officer Role: Its Relevance During the Recession, Recovery and the Obama Era](#)

¹⁴ Williams, Damon, and Katrina Wade-Golden. "The chief diversity officer." CUPA HR JOURNAL 58.1 (2007): 38.

¹⁵ Anderson, Redia, and Lenora Billings-Harris. Trailblazers: How top business leaders are accelerating results through inclusion and diversity. John Wiley & Sons, 2010.

What are Companies doing?¹⁶

- Approximately 60% of Fortune 500 companies currently have a Chief Diversity Officer (CDO) or executive role designated for diversity. Among them, 65% are female and 37% are African-American. They come from a variety of backgrounds, from human resources and marketing to finance and operations.
- One-quarter report directly to the CEO, while the rest answer to human resources or another department. When Pricewaterhouse Coopers LLC appointed its first CDO nine years ago, the executive worked under the umbrella of the human-resources department. Now the CDO reports directly to the chairman, and PwC rotates its own partners in and out of the role every two years.
- Many CDOs earn salaries equivalent to other senior roles like chief marketing officer or chief legal counsel. Depending on the size of the company, they may manage their own staff and budget, which can range from \$1.5 million to \$5 million at larger firms.

Sample List of Corporate Diversity Titles¹⁷

- *Chief Diversity Officer*, Deloitte & Touche
- *Vice President, Workforce Development & Diversity*, AT&T
- *Chief Diversity Officer*, Citigroup
- *Executive, Global Diversity & Inclusion*, Bank of America
- *VP, Diversity & Multicultural Initiatives*, Time Warner, Inc.
- *Executive Director, Diversity & Work Environment*, Merck & Co., Inc.
- *Director, Human Resources and Diversity*, Wells Fargo
- *Chief Diversity Officer*, Sodexo

What are Environmental Organizations doing?

The latest [Green 2.0 Report](#) examining the current state of diversity in environmental organizations identifies 12 organizations, 6.3% of 191 surveyed that have a diversity manager. The report states that, “The presence of such a position signals whether organizations are willing to put financial resources into a paid position to facilitate diversity efforts. The position is also an indicator of an organizations willingness to promote and institutionalize diversity practices.”¹⁸

The Diversity Working Group knows of four environmental organizations that have dedicated diversity roles – see list below and attached job descriptions. It is our recommendation that EDF hire a dedicated Diversity officer whose role has sufficient clout, influence, and seniority to interact with and understand executive level priorities. This leverage and access will be essential for EDF to effectively implement internal and external diversity and inclusion strategies.

- [Jessica Ronald](#), *Diversity and Effectiveness Representative*, Sierra Club HQ, 2012.
- [VonGretchen C. Nelson](#), *Human Resource Manager, Global Diversity Programs*, The Nature Conservancy, 2008.
- *Diversity Manager*, National Resources Defense Council, 2014
- [Whitney Tome](#), *Director of Diversity & Inclusion*, Center for Park Management | National Parks Conservation Association, 2014 (former EDFer)

¹⁶ [Firms Hail New Chiefs \(of Diversity\), CDOs Join Senior Ranks to Include More Women, Minorities: Some Report Directly to CEO](#), Wall Street Journal, January 5, 2012

¹⁷ [Top Diversity Leaders](#) article

¹⁸ Taylor, Dorceta. The State of Diversity in Environmental Organizations, July 2014. Page 50

Appendix E: Internal Interviews and Feedback

The Diversity Working Group interviewed internal EDF leaders for feedback on the diversity strategy and the below table documents each piece of feedback. The Working Group has incorporated this feedback into the final document to the extent it was possible. We recommend that those who implement the Diversity Strategy incorporate follow-up with the interviewees as necessary as implementation unfolds. A complete repository of interviews can be found on the Diversity Committee Project Space.

Category	Section	Number	Feedback Detail
Overall Feedback	General	A1	Elevate Diverse Partnerships (1st not 3rd component)
Overall Feedback	General	A2	Accentuate organization commitment (resources) in all components
Overall Feedback	General	A3	Include a definition of diversity to add more clarity.
Overall Feedback	General	A4	What is the timeline? What do we prioritize and if we only do one thing, what is it?
Overall Feedback	General	A5	Some language is wonky - what does "durable" and "equitable" mean? Also be careful using solidarity given its political and historical implications of the world - traditional association with anarchists, communists and socialists.
Overall Feedback	General	A6	The externally facing component seems more like a tactic than a core component.
Overall Feedback	General	A7	The diversity strategy is still much too general to be actionable. It needs to become much more specific.
Overall Feedback	International	B1, B2, B3	More clarity of what the term "minorities" mean in other countries and our international work.
Overall Feedback	International	B4	For theory of change - need to be clear on what "socio-economic" means. The importance of BRICs and others? Missing here is the idea of having relevancy and legitimacy in communities/places where we operate - both domestic and internationally. We should be explicit about this.
Overall Feedback	Communication	C1	Communications strategy is important for staff receptivity - don't want check-box, bureaucratic initiative.
Overall Feedback	Communication	C2	EDF must consider whether or how we want to create a public profile around our work to diversity

Category	Section	Number	Feedback Detail
Overall Feedback	Communication	C3	The implementation of a diversity strategic plan should enable a living laboratory across the organization for EDFers to share their challenges and success stories and best practices around diversity.
Overall Feedback	Environmental Justice	D1	If EDF is serious about doing this work, we're talking about a fundamental shift for the future of the institution, a redefinition of who we are. If we tackle diversity then by definition doing EJ work will be requisite. Do we state that off bat or let it run its course and take hold over time? We should have best practices for how we choose the work we do; and know the implications of our work.
Organizational strength	Diversity Officer	E1	Caution with diversity officer b/c it adds more bureaucracy and it's expensive. Recommends to set a time position for 2 years.
Organizational strength	Diversity Officer	E2	The role and seniority of the diversity officer must be continuously evaluated to ensure position is setting them up for success to implement the plan. Starting out, it doesn't seem that it will be someone on exec team but it's important to continuously re-evaluate if a junior role can be effective in implementing the plan.
Organizational strength	Metrics & Accountability	F1	How do we define social metrics? Oceans is struggling for global oceans plan.
Organizational strength	Metrics & Accountability	F2	Accountability measures should be well thought out to not be burdensome where programs have had success.
Organizational strength	Metrics & Accountability	F3	Consider incorporating questions when team members are planning projects and/or in annual reviews - create templates or tools.
Organizational strength	Metrics & Accountability	F4	Are we committed to assigning specific accountability for achieving results to a group that is larger than "several employees dedicated to diversity"?

Category	Section	Number	Feedback Detail
Organizational strength	Metrics & Accountability	F5	Are we committed to establishing metrics that will essentially be quotas? We need clearer articulation of the metrics and of who is accountable for achieving results. We also need to acknowledge that the recommendations here will alter hiring manager autonomy, regulate the hiring/promotion process and may slow it down. More importantly, we need to state our commitment to and support of those changes. Currently all staff are evaluated on Diversity Values in annual reviews. This is an example where the measure isn't enough, we need objective to the metric.
Organizational strength	Board	G1 and G2	How does org strength and having a more diverse board link to our international work? We should identify and address barriers (e.g. financial or time) to international trustees' engagement.
Organizational strength	Baselining	H1	Do we have a benchmark organization? Consider looking into how EDF achieved gender parity in terms of exec team - how did we get here and how do we compare to other orgs? Was this deliberate?
Organizational strength	Baselining	H2	Diversity baseline already exists
Organizational strength	Hiring / Retention	I1	Internal competition between programs and subprograms to share statistics on hiring based on ethnicity and gender, and whether improvements have been made. A little peer pressure can go a long way.
Organizational strength	Hiring / Retention	I2	Train managers to believe that it is possible to hire more diverse candidates and that it takes effort and time to achieve. One suggestion is to look for candidates outside of Ivy League schools, which are notorious for not being diverse.
Organizational strength	Hiring / Retention	I3, I4	Ensure that supervisors and hiring managers are both incentivized to have diverse recruiting pools and dis-incentivized to NOT have them. I've tried hard to have diverse pools but have never had it acknowledged - incentives and disincentives need to be transparent. Accountability for hiring managers is needed.
Organizational strength	Hiring / Retention	I3	Recognize that diversity and cultural competency looks different when your program target is rural America vs. urban America.

Category	Section	Number	Feedback Detail
Organizational strength	Hiring / Retention	I5	Hiring of foreign nationals needs to be addressed
Organizational strength	Hiring / Retention	I6	Milestone 5: Career advancement opportunities are in place... This statement is inherently biased. If we have career advancement opportunities in place for ALL employees, then people of color and minorities are de facto included. Are we saying that we plan to establish a separate program for people of color and other diverse groups?
Organizational strength	Hiring / Retention	I7	<p>We do not currently have "short lists" for either hiring or promotion. Are we talking setting goals/quotas?</p> <p>Improve diversity in EDF's hiring process through: conducting regular reviews of program and departmental hiring process: What does this mean? Who would conduct these reviews? Outside consultants? We need to establish consistent hiring processes. This sounds like centralizing the hiring process, which is a legitimate recommendation but needs to be more clearly articulated. It would take some control away from Programs and Departments.</p>
Organizational strength	Hiring / Retention	I8	With IT - there is definitely a pipeline problem. from early in our training, the people who learn coding, data analysis, and project management don't represent the diversity of the larger population. A lot of the digital progressives have long offered training scholarships to candidates who will increase our diversity. But some are taking a longer view of the solution, and are beginning to intervene earlier in the training pipeline. Should supporting the development of more diverse job candidate pools be part of our longer-term plan? IS earlier engagement feasible and appropriate for EDF?
Organizational strength	Development/Funding	J1	We need to ask donors to fund the diversity strategic plan and we should aim for a certain number of donors who are specifically funding diversity initiatives.
Organizational strength	Other	K1 and K2	We need a more formal, systematic and intentional way to stay abreast of what colleagues are doing abroad and need to define underlying function of organization strength within context of a globally expanding program.

Category	Section	Number	Feedback Detail
Cultural Competency	Milestones and definition	L1	Strengthen the wording of "cultural competency." The milestone makes it sound like just diversity and training and does not reflect full spectrum of the meaning.
Cultural Competency	Milestones and definition	L2	Include pyramid diagram or steps to clarify strategy - awareness, attitude, knowledge, and skills
Cultural Competency	Milestones and definition	L3	First milestone - baseline study - is vague - define what?
Cultural Competency	Milestones and definition	L4 and L5	4th milestone - cross-sector and multi-issue - would consider taking this out as a milestone. This is important, but we're not a social equity org - we're an environmental org. If milestones are real, this would be a huge shift in our work.
Cultural Competency	Milestones and definition	M1	Training is necessary but not sufficient - experiential learning is also very important.
Cultural Competency	Milestones and definition	M2	Oceans is working on training for making sure international folks have competencies to do their jobs - we should make sure to connect with them on this.
Cultural Competency	Milestones and definition	M3	How to do training right? Look at benchmark orgs and learn from what they did right and wrong. Also, devote resources to simple things like organizing food events that highlight diversity.
Cultural Competency	Milestones and definition	M4	Talk in EDF 101 about projects that include diversity
Cultural Competency	Milestones and definition	M6	On tactics of training staff and having on-boarding programs - Given the cross-cutting nature of these items, the "WHO" needs to be identified. Unless there is specific assignment of accountability, these are vague statements. If the accountability rests with a few identified individual positions, success is likely to be limited.
Cultural Competency	Other	N1b	We're finding that in growing small scale fisheries around the world, the outcomes we care about and the partners care about are tied directly to human and gender equity issues. Those need to be built into the fabric of our design.

Category	Section	Number	Feedback Detail
Cultural Competency	Other	N2b and N2c	The relevance of climate change and climate policy in CA is dependent on its relevance to CA's fastest growing population. We need more cultural competency training, more robust language skills, and to be more nimble in engaging partners and diverse constituencies and we need to figure out how to balance global interests with local interests (e.g. REDD)
Diverse Constituent Partnerships	Definition	O1	It's a AND construction that links environmental justice in particular versus diversity in general. If that is the case, consider separating it as a sub-goal.
Diverse Constituent Partnerships	Definition	O2	Including "national" in definition takes away from the place-based work that we do.
Diverse Constituent Partnerships	Definition	O3	What do we mean by equity?
Diverse Constituent Partnerships	Definition	O4	Grassroots is interesting - as this is not a tactic we generally use as an organization. It is a bit of a tactical shift, even if employed by partners. We should think very carefully about what such engagement would (and should) mean because we're not a grassroots organization. Will take a new skillset, new staff and training to really do well.
Diverse Constituent Partnerships	Milestones	P1 and P2	Milestones are more general in comparison with other two components; least specific. Consider improving them with, for example, a specification of numbers of partnerships, etc. - A third milestone might be to secure \$XX funding to develop this on-going work.
Diverse Constituent Partnerships	Milestones	P3a	Partnership milestone is too broad and too general and tactics are too conceptual. Risk that it's either too aspirational or too easy to dismiss. We need to help VPs go BIG on diversity - Add short term (year 1, year 2) goals for each program that helps the effort get off the ground and can demonstrate some quick wins for the strategic plan. For example, create a specific goal that every program starts a pilot diversity partnership in year 1, with specific measurable objectives stated.

Category	Section	Number	Feedback Detail
Diverse Constituent Partnerships	Milestones	P3b - P3d	b. Think about how to formalize partnerships that currently exist but are housed within a few people and are not necessarily institutionalized.c. Having the resources (especially financial) to invest and the staff bandwidth to manage and grow partnerships is critical. Grants, especially competitive, that the diversity committee administers would help tremendously. It could also be helpful to reframe internal resources as seed money grants so that early-stage project ideas can develop over time. The importance of making pass-through grants to our partners cannot be underestimated, as way to demonstrate true commitment to the partnership. Without them, we may not be taken seriously.d. Are there ideas about what a model partnership looks like? With the understanding that partnerships will be unique, it would still be helpful to see a vision for a model partnership.
Diverse Constituent Partnerships	Milestones	P4	social Equity Impact Assessment idea: seems tough to implement cross-organizationally, all at once - pilot on a couple of projects in a couple of programs and see how it goes.
Diverse Constituent Partnerships	Tactics	Q1, Q2	First tactic (equip and train staff) is repetitive and not sure it belongs there. Last tactic (" Develop and utilize a process and criteria for programs to systematically identify and cultivate potential new partners among diverse constituencies) should be the first one.
Diverse Constituent Partnerships	Tactics	Q4	Focus on building scientific partnerships (with academics) first. They are less politically charged and are a way for EDF to establish its credibility, develop relationships and establish a foundation.
Diverse Constituent Partnerships	Tactics	Q5	Tap internal knowledge: Find people within EDF who have built partnerships in other countries and learn from their strategies and experiences

Category	Section	Number	Feedback Detail
Diverse Constituent Partnerships	Tactics	Q6	Get VPs to change mental model of, "If I had resources, I would do this," to "Let's use the resources we have to do diversity partnerships because they are a priority"
Diverse Constituent Partnerships	Tactics	Q7	We need to reach out to orgs outside of our networks - where the innovation fund adds value as the pilot tests can help to diversify our network of networks. Example - Mary Robinson of Earth Justice has a very powerful network of powerful women.
Diverse Constituent Partnerships	Tactics	Q8	Like sustainability at companies, diversity has to be embedded in what we do
Diverse Constituent Partnerships	International	R1	We need to approach international partnerships differently - 1st step is to focus on gaining cultural competence (takes time); 2nd is to do a landscape analysis (opps, challenges, potential partners)
Diverse Constituent Partnerships	International	R2	International climate has a great deal of experience in this work, particularly in building strong and equitable relationships with diverse partners, it makes sense for others to talk with them to ID best practices.
Diverse Constituent Partnerships	International	R3	There are only relationships with individuals, not organizations.
Diverse Constituent Partnerships	International	R4	Top way to support international work with diverse groups is to "send money" to cover: consultants, fellow/interns, pass-through grants, visas, legal fees, study tours, etc.
Diverse Constituent Partnerships	International	R5	EDF could re-tool sabbatical policy and take advantage of modern technology to allow people to build relationships with diverse partners while still doing their jobs.
Diverse Constituent Partnerships	International	R6	When we talk about hiring for our international work - need to know what we mean for metric of hiring minorities.
Diverse Constituent Partnerships	International	R7	What are analogs of EJ community internationally?

Category	Section	Number	Feedback Detail
Diverse Constituent Partnerships	International	R8	It's clear international partnerships are different than domestic. We should make sure that this strategy acknowledges that and that we have a ways to go for international, which requires more work to flush out. And that's okay b/c our US work is ~85% of what EDF does.
Diverse Constituent Partnerships	Ecosystems	S1 - S3	WATER: It's important to work with coalitions that work with diverse serving organizations, with diverse elected leaders, and influencers on water regulations. Nuestro Rio is one organization to engage Hispanic communities in AZAGRICULTURE: Most of work to reach out to farmers is vision to grow program - but are still working on defining the right way and orgs to expand relationships with Ag community MEXIO - exploring grant opportunities to work there - could be a bi-national op for EDF and cultural learning opp.
Diverse Constituent Partnerships	Ecosystems	S4	Facts in evaluating Vietnamese and Cambodian fisherman in Louisiana: 1. They are not an "association" but are organized 2. EDF is already working with them under a Walton grant 3. They are a key constituency for EDF's goals - not essential to have them along in our campaign, but would greatly aid our work 4. We are working with woman, Sandy Nguyen, who heads nonprofit whose mission is to help the community of fisherman.
Diverse Constituent Partnerships	Ecosystems	S5	We have made assumptions over the years about what constitutes "diverse" in context of America's working lands. This diversity plan creates a motivation and opportunity to take a deep dive - they recognize that political, religious and other values are different in America's heartland than in urban areas and need to explore how demographics are changing there so they can be more effective.
Diverse Constituent Partnerships	Oceans	T1	Our core mechanism to be successful [in the Oceans program global expansion] is empowering others, partnerships. We may have a different looking staff but if you aggregate the partners we're training to be the local levels, doesn't make sense to hire staff. Point is to develop capacity for the long term

Category	Section	Number	Feedback Detail
Diverse Constituent Partnerships	US Climate & Energy	U1	EJ must be one of the lenses through which we view our program and the most effective way to do this through robust and equal partnerships.- we can't declare victory on anything if it's creating an environmental hazard.- We need to be working locally to build local presence where our office are; just having building doesn't make us known.- Value add of having org focused on diversity is bringing on more board members that can connect us to orgs, groups, leaders we currently don't have access to specific CA partners: Greenlining Institute; green for all; CEJA, and EHC
Diverse Constituent Partnerships	US Climate & Energy	V1	international methane work will likely start in Mexico and Canada. Let's start by doing a landscape analysis for these two countries and start building our cultural competence there.
Diverse Constituent Partnerships	Natural Gas	V3	Natural gas work can build of EJ work started in South Texas. Based on workshops held so far we may learn that working with communities in South Texas may be less about accessing Spanish-speaking communities and more about accessing and amplifying the voice of a culturally distinct community that has been marginalized by the dominant power structure of the region. This "culturally distinct community" includes Latinos but also other demographic groups that have not had a seat at the table or do not already understand how to interact in the current legal and regulatory structure. Mark also brought up the possibility of accessing other demographic groups in some of the natural gas program priority states, including Native Americans, Appalachian communities, or any other combination of groups that simply has not been able to interact with the dominant power structures in their region.

Category	Section	Number	Feedback Detail
Diverse Constituent Partnerships	Natural Gas	V4	Engaging the religiously-practicing Jewish community for EDF programs at large, but in more specific ways for the natural gas program milestones. Tapping into this traditionally conservative group, Mark said, could bring significant leverage to accomplishing organization-wide goals and not just U.S. Climate and Energy goals. One group to consider engaging would be Chabadaniks to bring people into their movement using an environmental message. Also Canfei Nesharim - well aligned mission with EDF. Noble Energy in Israel also possibility (Fred knows well) and Israel hotbed for high tech and may have good smart grid technology.
Diverse Constituent Partnerships	Natural Gas	V5	Assessing how well we interact with and communicate with devout religious communities, and finding ways to include these groups in accomplishing our goals. Although we have engaged faith-based groups, we may not be doing enough to include traditionally conservative faith-based groups. For example, we have not done very much work with Catholic priests, Baptist preachers, or evangelical groups
Diverse Constituent Partnerships	Office of Chief Economist	W1	There could be some synergies with the diversity strategy in that someone with strong econometrics with bandwidth to work on issues of EJ impacts of programs would be valuable
Diverse Constituent Partnerships	Corporate Partnerships Program	X1	How can we get CPP and EDF to look more like the EDF Climate Corps fellow cohorts.
Diverse Constituent Partnerships	Corporate Partnerships Program	X2	For commodities work, they are still working on tweaking the milestone, but are coordinating with usual suspects - WRI, TNC, WWF. They want to engage companies in supply and demand chain and on ground partners. But it will be hard for EDF to be driving org - on ground partners now include EPOM, Emazon, Coico.
Diverse Constituent Partnerships	Corporate Partnerships Program	X3	What do we mean by end objectives and effectiveness? a. Brazil - will need people of European ancestry b/c they are more politically powerful; in order to do our work properly but a huge win is with communities of indigenous people...we need to do both of those things to be effective. What do we mean by effectiveness? Being inclusive is part of solution.

Category	Section	Number	Feedback Detail
Diverse Constituent Partnerships	Health	Y1	Working at intersection of climate and toxics, she's been talking with Vickie Patton about how to better identify community hot spots, significantly related to air quality and disease burdens - could mesh with our Ports, NG, methane mapping, and 111D work.
Diverse Constituent Partnerships	Health	Y2	With NG mapping project, they are proposing to overlay asthma rates with demographic data and working with Denver public health to get access to data.
Diverse Constituent Partnerships	Health	Y3	Overall goal is to add a significant health component for EDF's work, focusing on identifying communities most heavily impacted by environmental impacts that we focus on. By looking at current projects at EDF, her goal is to make sure we are really evaluating health impacts and measuring them, not just talking about them after the fact. She wants to make sure it's something we're measuring progress against and factor it into design and scope of what we do - not just a communication tool.
Diverse Constituent Partnerships	Health	Y4, Y5	Partnerships with medical and scientific associations are one angle they are looking at. They're trying to figure out what criteria is for how to identify and develop goals together and further goals with other orgs. Some partners or prospective partners include: <ul style="list-style-type: none"> - LULAC - National Hispanic Medical Association - they are ready to work with us, have lots of ideas and hope to build out work on toxics and air. - ALA - CA has done a lot with them...place for greater health work? - Looking for ways to better inform physicians about critical questions patients are asking to reduce exposure. Focus on science and medical communities. NHMA, ACOG, American Cancer Society, March of Dimes, Planned Parenthood.

Category	Section	Number	Feedback Detail
Diverse Constituent Partnerships	Health	Y6	Working across programs have been challenging - when they are a program in it of themselves - there are a lot of institutional back and forth about health being a separate program vs. cross cutting - going forward it will be a hybrid model - go where there is momentum and bring a bigger whole around it - building it is kind de novo - you can build it and no one comes. Board has been talking more about health - so has climate, NG, etc.

Appendix F: Glossary Sources

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