WORKFORCE

Creating a Diverse, Equitable, and Inclusive Workplace Culture:

Perspectives of LeadingAge Members

LeadingAge
LTSS CENTER
@UMass Boston

Research bridging policy and practice

About this Report

This research brief was developed in support of a key LeadingAge strategic goal: to advance diversity, equity, and inclusion (DEI) in the long-term services and supports (LTSS) workplace. Over the next three years, LeadingAge will use the findings from this and other DEI research to design and disseminate a host of practical tools and resources that its members can use to develop a more diverse and inclusive LTSS workforce.

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About the LTSS Center

The LeadingAge LTSS Center @UMass Boston conducts research to help our nation address the challenges and seize the opportunities associated with a growing older population. LeadingAge and the University of Massachusetts Boston established the LTSS Center in 2017. We strive to conduct studies and evaluations that will serve as a foundation for government and provider action to improve quality of care and quality of life for the most vulnerable older Americans. The LTSS Center maintains offices in Washington, DC and Boston, MA.

For more information, visit LTSSCenter.org.

Table of Contents

Introduction

During 2021, researchers at the LeadingAge LTSS Center @UMass Boston interviewed leaders at nine LeadingAge member organizations about their efforts to advance diversity, equity, and inclusion (DEI) within senior living communities. The interviews were part of a four-part study that the LTSS Center conducted in support of a key LeadingAge strategic goal: to advance DEI in the long-term services and supports (LTSS) workplace.

The LTSS Center research, which included a member survey, a literature review, and two sets of leader interviews was designed to:

- Collect data on the DEI activities that LeadingAge multisite organizations and life plan communities are conducting.
- Review the current literature on strategies to advance DEI in the LTSS field.
- Gain insights into the processes that LeadingAge member organizations are using to plan and implement DEI activities.
- Hear from senior leaders of color about their own career journeys and their experience with DEI issues.

Over the next three years, LeadingAge will use the findings from this research to design and disseminate a host of practical tools and resources that its members can use to develop a more diverse, inclusive, and equitable LTSS workforce.

This Research Brief: Perspectives of LeadingAge Members

This research brief contains a variety of insights from leaders of LeadingAge member organizations that are implementing activities to advance DEI values within their workforce cultures. The authors interviewed the chief executive officer (CEO) and the person who oversees the DEI activities at nine LeadingAge member organizations.

The individuals overseeing DEI activities at the nine organizations included both full-time and part-time leaders:

- **Full time:** Vice presidents or senior vice presidents of diversity, equity, and inclusion; and a co-leader of a center devoted to diversity, equity, and inclusion (four providers).
- **Part-time:** Senior leaders who oversee human resources or education and development and work with the CEO on DEI issues (four providers).
- A CEO who oversees the organization's DEI efforts (one provider).

During their interviews, leaders reflected on a variety of topics. Their insights, reflected in the following pages, address:

- → Their organizations' DEI goals and motivation for initiating DEI activities.
- → Attributes of organizations with a DEI workforce culture.
- → Strategies for DEI implementation.
- → Tools to get the DEI journey started.
- → DEI initiatives that organizations have implemented.
- → The role of the board of directors and senior leaders in advancing DEI.
- → Measuring the impact of DEI initiatives.
- → DEI challenges and successes.

One Caveat

This document is a research brief, not a toolkit for building a DEI workforce culture. No DEI strategy featured in the following pages will apply to every LTSS organization. The following provider insights are presented with the intention of helping other providers develop DEI goals and plans that are tailored to the organization's unique circumstances.

Provider Insights

Motivation and Goals

Motivation

The murder of George Floyd, the Black Lives Matter movement, and the COVID-19 pandemic gave many providers the impetus to either begin addressing DEI issues or to be more intentional about their ongoing DEI work. These major societal events represented an "awakening" that spurred leaders to recognize that the time had come to be more proactive about promoting diversity, equity, and inclusion.

> **What I started seeing on the faces of the team was just this pain. Staff members didn't know how to process and deal with it. And we're asking them to still come to work, do all the things that they do, make our residents happy, you know, just be happy with the situation. And so I knew that we had to do something.**
> *– A LeadingAge member*

Other motivating factors for starting or enhancing DEI efforts included:

- → **Lack of diversity at higher levels of the organization:** Most providers recognized the disconnect between their diverse frontline caregiving workforce and their predominately white leadership. They wanted to be more intentional about working toward racial and ethnic diversity in senior leadership teams and boards of directors.
- → **Mission:** As nonprofit and, in many cases, faith-based organizations, some providers felt their mission-driven commitment to social justice required that they work toward creating a diverse, equitable, and inclusive workplace culture.
- → **Passionate leadership:** In some cases, a CEO or board member with a passion for social justice issues instigated DEI discussions and encouraged colleagues to incorporate DEI into the organization's goals and strategic plan.

DEI Goals

Providers identified their organization's DEI goals:

- Increasing board and/or senior leader diversity.
- Educating and training staff, board members, and residents.
- Changing the organization's culture.
- Establishing collaborative relationships and partnerships with outside organizations that have a commitment to DEI.
- Fostering a more diverse resident population. [1]

Attributes of Organizations with a DEI Workforce Culture

Organizations with a DEI workforce culture share one common characteristic, according to providers: DEI is integrated into every aspect of the organization's operations and the organization's culture reflects DEI values. As a result:

- Team members of different races interact and work together, and everyone takes ownership of DEI.
- The organization's leadership becomes increasingly diverse.
- Each person feels that their voice and opinions are heard and respected.
- All the organization's operations, policies, and strategies are characterized by equity.
- The organization takes an introspective approach to DEI, continually assessing and improving its culture and working to remove any barriers that impede progress.

DEI Strategies

It takes time, work, and persistence to implement initiatives supporting an organization's continuous, evolving journey to become more diverse, equitable, and inclusive. Providers use a variety of strategies to implement DEI and incorporate it into the fabric of their organizations. These strategies include:

- **Gain buy-in and support from the board, CEO, and senior leadership.** When the board of directors and executives are committed to placing DEI values at the forefront of business operations, all team members become accountable for carrying out DEI goals.

- **Involve and engage staff.** Every team member needs to be involved and engaged in embedding DEI into the organization's workforce culture. While some providers piloted DEI initiatives with the senior leadership team and/or board members, others involved all staff at the beginning of the DEI journey.

> " **It takes time, work, and persistence to implement initiatives supporting an organization's continuous, evolving journey to become more diverse, equitable, and inclusive.** "

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[1] This goal, while key, is not the focus of this brief.

- **Aim to change the organizational culture.** Many providers viewed culture change as the "end game" of their DEI efforts. Creating a more inclusive culture requires a long-term effort to adopt a different way of operating based on the readiness of the organization.

- **Align DEI with the organization's strategic plan.** Making sure DEI goals align with the organization's strategies, values, and mission helps to ensure that DEI becomes an ongoing, long-term process for which the leadership team and staff are held accountable. Organizations with this alignment will keep DEI values in mind when selecting vendors, recruiting staff, conducting professional development, designing career advancement opportunities, developing policies and practices, and allocating resources.

- **Rely on metrics to encourage accountability.** Metrics allow providers to assess the impact of DEI efforts; determine whether those efforts are achieving DEI goals and objectives; and hold staff, senior leaders, and vendors accountable for carrying out the organization's DEI commitment.

DEI Tools

Providers used a number of tools to help them launch and advance their commitment to the organization's DEI initiatives.

Specific Position Responsible for DEI
Three providers created a full-time position to advance DEI efforts and make them a priority. These individuals report directly to the CEO. In other organizations, DEI was part of the responsibilities of a full-time employee. Organizations can also hire a consultant to oversee the DEI work if sufficient resources are not available to fund a full-time or part-time position.

DEI Committee
More than half of the providers established a DEI committee or council to advance their DEI goals. Some DEI committees feature several workgroups that tackle specific DEI initiatives or implementation challenges. Multisite providers may have separate DEI committees at the organization's headquarters and at each community. These committees can:

- Develop DEI goals, strategies, and a DEI statement.
- Set the framework and programmatic direction for the DEI effort.
- Implement DEI strategies and initiatives.
- Report progress, challenges, and successes—and provide recommendations and advice—to the senior leadership team and board.

Committee members might include mid-level or senior leaders representing different departments. A few committees include frontline staff. Residents belong to some committees. A few organizations created a board-level DEI committee.[2]

Providers took different approaches when selecting someone to chair the DEI committee. The DEI committee can be chaired by the CEO, chief diversity officer or person overseeing DEI, a board member, a member of the frontline staff, or a member of the senior leadership team.

[2] This option may require a change to the board's by-laws.

DEI Consultant

Several providers reported relying on an outside person with DEI expertise to help them plan and implement their DEI work. Some providers received that help from peer mentors and other providers who were further along on the DEI journey. In some cases, providers hired DEI consultants who:

- ➔ Guided the DEI effort during its early stages.
- ➔ Provided coaching and support for the person overseeing the DEI initiative.
- ➔ Conducted education sessions and trainings.
- ➔ Facilitated listening sessions and DEI discussions during team retreats.
- ➔ Assessed the readiness and willingness of the organization to commit to advancing DEI.

Organizational Assessment

Several providers began their DEI journeys by conducting an assessment to determine the readiness of the organization and its staff for DEI activities. In some cases, board members also participated in the assessment.

The assessment can help an organization set its DEI priorities, establish the scope and direction of its DEI work, and identify gaps in its DEI activities. The organizational assessment can also give providers important information about where to focus their DEI efforts. For example, one provider reported that its assessment uncovered the need for the organization to increase the diversity of its suppliers and expand its collaborative relationships with outside entities.

> **Take the time to figure out what you're trying to do. What is it that you want to accomplish? Understand that it's a journey. It's not a one and done. So, because it's a journey, you have to take one slice at a time.**
> *– A LeadingAge member*

Several providers used the Intercultural Development Inventory (IDI) to conduct their assessments. The IDI assesses intercultural competence at the individual and organizational levels and provides a report profiling the organization's capability to shift its cultural perspective and adjust behaviors related to cultural differences and commonalities.

Outside Resources

Several resources have helped providers as they designed and implemented DEI work:

- ➔ Equity and inclusion resources from The Annie E. Casey Foundation.
- ➔ Resources from the Society for Human Resource Management.
- ➔ DEI reports from McKinsey & Company.
- ➔ Opening Doors and Understanding Resistance retreats sponsored by Michigan State University.

> **The culture is everything, in my view, the culture that employees experience. It's the culture that we project into the world. We'd like it to be genuine. We'd like it to be affirming of everyone and inclusive.**
> *– A LeadingAge member*

DEI Initiatives

Providers have implemented a variety of initiatives to support their DEI work, including education and training, town halls and listening sessions, special events to celebrate diversity, internships with a DEI focus, partnerships with entities that can help with DEI efforts, and policies and practices aimed at increasing diversity within the organization.

Education and Training

Education and training sessions offer employees a foundation in DEI issues and ensure that all staff within the organization have the same basic understanding of those issues. Such sessions can serve as the first step in a multi-pronged strategy to change the organization's culture.

DEI education often takes place during formal sessions, but providers also educate staff about DEI issues through newsletter articles, during onboarding, or as part of stand-up or regular work meetings.

Providers may work with consultants or trainers to facilitate formal DEI education and training sessions, or they may ask internal staff to lead those sessions. Formal education sessions can help staff and board members better understand what DEI is and why it is important, how to create an inclusive and equitable culture, and how to recognize and address unconscious bias. Providers have also educated staff on anti-racism and white fragility and privilege.

While some organizations may target their education initiative to senior leaders and/or board members, most providers recognize the importance of educating all team members. For example, one provider used a cohort model for its DEI education effort. After C-suite staff in the organization's first cohort participated in anti-racism training, the organization then offered the training to a cohort of mid-level managers, followed by a third cohort of frontline staff.

> **The people that were in the shadows were able to have their voices heard. I know the tough conversations we've had, but then I know the learnings that came from it.** *– A LeadingAge member*

Each cohort's training ran for three hours each week over five weeks. In addition to the training and homework assignments, members of each cohort discussed training topics and shared stories with one another. The director of human resources, who oversees DEI activities, participated in each cohort, and encouraged cohort members to volunteer to serve on the organization's DEI committee.

Town Halls and Listening Sessions

Almost all the providers reported holding listening sessions, town halls, or learning circles to help staff members talk with each other about race and racism. These sessions can provide a safe environment in which staff can share their personal and professional experiences with racism, express their feelings about those experiences, acknowledge past hurts, and apologize when needed.

While these conversations can sometimes be uncomfortable or difficult, organizational leaders believe they help staff build bridges, develop relationships, and understand each other better. The sessions have also taught providers lessons about the importance of listening to team members, offering them supports and resources, and working together to be part of the DEI solution, not part of the problem.

Diversity Celebrations

Providers report that they are taking deliberate steps to celebrate diversity by sponsoring or participating in cultural activities and observances throughout the year. Examples include:

- Dedicating one month to celebrating different cultures.
- Celebrating religious and ethnic holidays.
- Sponsoring cultural festivals.
- Planning activities to celebrate Martin Luther King Day and educate staff about Dr. King's legacy.
- Disseminating newsletters that recognize and promote cultural holidays or special events.
- Holding National Diversity Day celebrations that encourage staff and residents to embrace diversity.

Internships

Almost half of the providers reported that they offer internships to give students of color real-world experience in the field of aging services. Five providers participated in the Summer Enrichment Program, a 10-week immersive internship sponsored by LeadingAge. A few providers are partnering with Historically Black Colleges and Universities (HBCU) to sponsor internships at their organizations. One provider is exploring the possibility of developing a senior living community on the campus of an HBCU.

Partnerships

Providers reported that they are in the early stages of forming partnerships and expanding networks to create a broader awareness of job opportunities in aging services and to diversify their senior leadership and mid-level management teams. These providers are building relationships with organizations that support underrepresented communities, including African American fraternal organizations and sororities, HBCUs, the African American and Hispanic chambers of commerce, and entities serving Asian American and Hispanic groups. In addition, providers are encouraging employees to send position advertisements to their diverse networks.

A few providers are collaborating with HBCUs to sponsor clinical internships at the organization. Some organizations are exploring internships for HBCU students in other disciplines, such as business. Other organizations are exploring partnerships with churches like the African Methodist Episcopal Church.

Finally, providers reported that they are reviewing their policies and procedures to ensure that their business partners are committed to DEI values. One provider changed its Request for Proposals to include questions about vendors' commitment to DEI. The provider also ended a contract with a significant partner after learning that the partner's CEO made disparaging comments about race.

> **Providers reported that they are reviewing their policies and procedures to ensure that their business partners are committed to DEI values.**

Policies and Practices to Increase Diversity

A few organizations have already revised their recruitment plans and have a diverse C-suite and/or board of directors. However, most providers acknowledged the need for improvement in this area. These providers are developing new policies and practices to help them recruit a diverse pool of experienced and skilled leaders and board members.

- ➲ **Board structure:** Providers are evaluating how board members are nominated and recruited. Some providers are limiting board terms and filling vacancies with experienced candidates from diverse backgrounds. Others are expanding the size of the board. Some providers have developed a matrix for the board's ideal composition and are aligning that matrix with the organization's strategic initiatives.

- ➲ **Recruitment:** Providers are revising or developing policies to help them recruit a diverse pool of applicants. For example, some organizations are reviewing senior leadership job descriptions and inserting language addressing diversity. Others are working with recruitment firms that specialize in identifying diverse talent and are requiring other recruiters to present a diverse slate of applicants for open positions. Providers reported emphasizing the importance of DEI during the screening and interviewing process and using standardized behavioral interviewing to remove bias. They are also working with supervisors to interview diverse candidates.

- ➲ **Retention:** Providers are reviewing and revising the onboarding process and examining whether their organizations are providing career pathways and professional development for all staff.

Having a more diverse applicant pool does not always translate into hiring a more diverse workforce. It is not clear whether, or to what extent, providers are evaluating the hiring process to identify barriers to selecting candidates from diverse backgrounds.

The Role of the Board and Senior Leadership

Role of the Board

Providers identified two primary ways the board of directors can advance the organization's DEI strategy and goals. These include:

- ➲ **Making DEI a priority for the organization and providing support and credibility** to the DEI work. Board members can allocate resources specifically for DEI; work to develop the DEI statement, framework, strategic plan, and goals; and provide advice about the DEI effort to senior leaders.

- ➲ **Provide oversight and accountability.** The CEO or person overseeing the DEI work reports to board members on DEI progress and achievements. Board members help identify gaps and brainstorm solutions to DEI implementation challenges.

Board members can also participate in DEI education and training sessions, join DEI advisory groups, and work actively to diversify the composition of the board.

Role of Senior Leadership

After participating in DEI educational sessions and self-reflection activities, senior leaders are in a good position to:

- ➡️ **Offer buy-in and support**: The CEO and senior leaders can keep DEI at the forefront of organizational operations and help the organization bring about systemic change. They can also communicate the importance of the organization's DEI work and model the behaviors that the DEI initiative is seeking to encourage.

- ➡️ **Help the organization incorporate DEI goals into its operations.** The senior leadership team plays a central role in integrating DEI into all the organization's services and work. The heads of all departments—including marketing, human resources, and finance—should see their work through the DEI lens. For example, senior leaders might work with the director of human resources to increase the diversity of applicants and new employees.

- ➡️ **Encourage accountability.** Senior leaders can ask the individual overseeing the DEI initiative, or the chair of the DEI committee, to report regularly on the activities, challenges, and accomplishments of the DEI effort. Senior leaders can hold colleagues accountable by making them aware of actions that aren't consistent with the organization's DEI values and then working with team members to adjust those actions.

Measuring DEI Success

Approximately half of the providers either do not have or are starting to develop metrics to measure the success of their DEI initiatives. Some providers work with consultants to establish their metrics, while others rely on the DEI committee or the person responsible for DEI to recommend metrics that should be tracked.

Providers with established metrics are focused on measuring their success in:

1. Expanding leadership diversity.
2. Increasing resident growth and diversity. More than half of the providers mentioned this focus.
3. Increasing the diversity of the applicant pool. One provider's goal is to build an applicant pool that is 20% to 25% diverse.
4. Educating and training staff. Metrics track trainings held and/or number of employees trained. Providers don't seem to be assessing the extent to which education and training leads employees to use their new knowledge or change their behaviors.

Few providers reported using metrics to measure staff career advancement opportunities and promotions, the organization's partnerships, or retention of staff members. A few providers use the results of employee engagement and satisfaction surveys to track whether their DEI work is having an impact.

Defining metrics that measure success, and incorporating them into performance evaluations, can be challenging, as can collecting the appropriate data. Providers are split on whether their performance evaluations of senior leaders include measurable DEI-related behaviors. Providers that include DEI in performance evaluations typically assess how leaders are meeting specified goals and what leaders have done to engage in and support DEI. One provider ties the goals of the organization, including DEI, to compensation for senior leaders.

DEI Challenges

DEI is a long-term journey and providers describe several challenges they have encountered along the way. These include:

Gaining Staff Support for and Engagement in DEI

Key challenges include:

- **Balancing differing staff beliefs about DEI.** Some team members do not want to spend time on DEI while others believe DEI should be the top priority. Bringing both groups together can be difficult.

- **Addressing staff attitudes about DEI,** including preconceived notions, strong opinions, stereotypes, political rhetoric, and lack of staff willingness to examine and have conversations about DEI-related issues.

- **Implementing DEI committee recommendations** throughout the organization.

- **Engaging frontline staff in DEI activities** without interfering with their job responsibilities.

These challenges underscore the importance of understanding how staff members within the organization relate to DEI issues, how to frame those issues, and where to start DEI work. Organizational leaders must meet employees where they are. Providers understand that they will not change all minds at the organization. But they feel it is important to invite everyone to be part of the journey, help team members understand DEI's importance to the organization, and work together to make improvements.

Diversifying the Board and Senior Leadership Teams

Key challenges include:

- **Navigating built-in restrictions:** Faith-based organizations may have requirements governing the percentage of board members who are affiliated with or chosen by the denomination that founded the provider organization. If denomination members are predominately white, the organization may have difficulty diversifying the board. Limited turnover may also limit opportunities to achieve diversity in senior leadership positions.

- **Navigating attitude-based restrictions:** Implicit bias may affect hiring decisions. Diverse candidates who interview at the organization with a predominately white senior leadership team may question whether they belong at the organization.

Building Credibility for DEI

Leaders must demonstrate their commitment to changing the organization's culture. If DEI is only a program, and not a long-term culture change initiative, those leaders will lose credibility with team members and DEI will not succeed.

Advancing DEI at Individual Affiliates or Communities

A parent organization cannot dictate change among its affiliates, which are independent entities. It can only guide and coach those affiliates. Supportive managers at headquarters must work collaboratively with boards and senior leaders at each community to embed the DEI culture.

Allocating Adequate Time and Resources

Organizations can struggle to prioritize DEI when they face many competing demands on their time and resources.

DEI Successes

Many organizations continue to work on and refine their DEI strategies. Organizations that are just beginning their DEI journeys don't yet know the impact of these strategies. Other organizations with more mature DEI initiatives report some successes.

Primarily, providers have found that their ability to create safe spaces where staff can discuss DEI issues has had the greatest impact on their organizations to date. Employees who took advantage of these safe spaces were able to develop more empathy and respect for their colleagues, develop stronger relationships, and come to a deeper understanding of each other's experiences.

> **"Providers have found that their ability to create safe spaces where staff can discuss DEI issues has had the greatest impact on their organizations to date."**

Several providers mentioned other successes:

- ⊙ Expanding services to mixed-income housing and diverse communities after establishing the organization as a promoter of diversity, equity, and inclusion.
- ⊙ Increasing staff awareness of workplace inequities and encouraging individuals to be more open-minded about DEI issues.
- ⊙ Growing and diversifying the resident population due to increased awareness in the surrounding community about the provider's commitment to diversity.
- ⊙ Diversifying the organization's board and workforce. Diverse candidates from other states sent one provider employment applications after learning about the organization's DEI work.

Conclusion

There isn't a one-size-fits-all strategy for rolling out a successful DEI initiative. A provider must first understand the readiness of staff and the organization. Only then can it begin charting its roadmap for advancing DEI.

DEI is a continuous journey marked by inevitable bumps and obstacles. But a DEI initiative is more likely to be successful if it has buy-in from the CEO and board members, aligns with the organization's strategic plan and mission, is integrated into the organizational culture, and is assessed regularly to measure its impact and identify needed adjustments.

DEI starts with the most powerful individuals inside the organization: the CEO, senior leaders, and board members.

Senior leaders must:

- Be prepared to hear the "ugly truth" about the organization from staff.
- Encourage and prepare staff to be responsive to the DEI process and DEI issues.
- Be realistic about the timeframe needed to accomplish DEI goals.

Boards of directors must:

- Guide the organization so the CEO and leadership team will lead the DEI work.
- Provide a dedicated DEI budget and resources.
- Take action to make the board's composition more diverse and its governance process more equitable and inclusive.

> **There isn't a one-size-fits-all strategy for rolling out a successful DEI initiative.**

Organizations must:

- Demonstrate the business case for DEI investments, including the opportunity to build a larger pool of potential team members, reduce staff turnover, and expand resident diversity.
- Continually update staff on the progress, successes, and challenges of DEI work.
- Start the DEI process, even if that means starting small. Small changes made today can pave the way for future growth that can transform an organization.

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Research bridging policy and practice

Visit **www.LTSSCenter.org** to learn more.