



## A COMPREHENSIVE CASE STUDY

# Building Equity and Inclusion in Organizational Policies and Operations

## Client Demographics

**Nonprofit HR Practice Area:** People & Organizational Strategy

**Location:** National

**Sector:** Nonprofit

**Mission Type:** Association for Healthcare Professionals

**Staff Size:** 25-75 full-time employees

**Annual Budget:** \$10.1 - \$20 million

## Scenario

This client of Nonprofit HR aimed to take meaningful, intentional steps toward building equity and inclusion into their policies and operations as well as continue modeling inclusive leadership within their team. Nonprofit HR's Diversity, Equity & Inclusion practice supported the initiation of three task forces to engage in an equity assessment process to evaluate their current state, identify areas of opportunity and design an outcome-based strategy in the areas of certification testing, vendor diversity and internal HR policies and practices.

**Project Duration:** Ongoing

## Project Goals

After a robust equity assessment, Nonprofit HR uncovered gaps in the client's processes and explored how different identity groups experienced their work environments. The equity assessment entailed an in-depth document analysis using an equity lens to guide recommendations; evaluation of all HR policies, practices and procedures; organization-wide assessment; external review of employment brand and Internet presence; and a series of focus groups. Nonprofit HR provided the client with an intimate view into their strengths and areas of opportunity as it related to advancing and operationalizing DEI.

Areas of concern related to the HR lifecycle were compensation, the path to promotion, work-life balance, interviewing processes and employment branding. Opportunities to reimagine their certification processes and vendor procurement processes were also examined, and intentional recommendations were developed. With Nonprofit HR's findings and recommendations, the firm and their client began a prioritization process to develop a measurable strategy. Staff self-selected into three working groups/task forces that were chartered to prioritize recommendations, develop action plans and integrate best practices into their processes. Nonprofit HR's DEI team guided their roadmap process, which has the potential to transform the employee experience, further ingrain equity into their vendor processes and impact thousands of certification holders who use their professional testing services.



## Considerations

- 1 Recognizing the client's specialized certification equips frontline service providers with the knowledge and skills required to serve an array of patient needs.
- 2 Addressing the time issues that present challenges during the rigorous certification process by adding and evaluating cultural competencies.
- 3 Acknowledging the certification process is tested by industry leaders who may not have the same viewpoints as the client.
- 4 Discerning the different state regulations that impact the client's ability to institute national changes to their process.

## Solutions

This client is focusing on reimagining their HR lifecycle – recruitment, hiring, retention, compensation, promotion and exiting the organization – to ensure equity is at the forefront of their processes. Under the guidance of Nonprofit HR, each process will be strengthened to increase staff sense of commitment to their roles and increase an overall sense of belonging for staff. The objective was that by strengthening systems and infusing equity into HR policies that directly impact the staff experience, staff will feel a greater sense of belonging and remain invested in executing the organization's mission, ultimately shifting the organizational culture.

Given that the certification process is guided by industry standards, there are external challenges that the client was invested in addressing that have the potential to influence other industry leaders to advance equity in patient care. The client is re-evaluating their volunteer model that supports the certification process, revising their guidebook that outlines their professional standards and test taking preparation, integrating cultural competency initiatives and training into their offerings for advancing the practice, and connecting with other industry leaders interested in this work. The vendor process will be redeveloped to align vendors with shared commitments to DEI, widen their selection process to include diverse businesses and re-establish a standardized process at all funding sizes. By investing in their vendor process, they will bring their DEI values into action.

## Looking Ahead: Next Steps

The client is committed to shifting their process, creating industry buy-in and developing equitable strategies that will have a lasting impact on their patients.