



Nonprofit**HR**

People & Organizational Strategy

WHITE PAPER

# From Resistance to Persistence: EDIJ 2024 & Beyond

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## From Resistance to Persistence: EDIJ 2024 & Beyond

Diversity, equity and inclusion in the workplace have been at the forefront of organizational focus for the greater part of the last decade but has its origins dating back to the 1960s<sup>1</sup>. Since then, equity, diversity, inclusion and justice (EDIJ) has been pertinent as nonprofit organizations strive to create inclusive environments welcoming to people across identities. As the world grapples with ongoing conflict and polarization, it is important to understand the current landscape of EDIJ and how to ensure sustainability in the future.

What does EDIJ look like today? What is the current narrative and reality of EDIJ at nonprofits? Is it based on experiences with the organization, based on the global context, influenced by the media or all of the above? EDIJ is often shaped by contextual factors captured in the above questions and influenced by the ongoing rhetoric prevalent across the nation and the media. EDIJ has been all over the headlines and some of the headlines are creating fear around moving forward with DEI initiatives, a tactic that has been used to detract from progress for centuries. As nonprofit organizations committed to vital missions, it is important to have a clear picture of the reality of EDIJ and how it is a driver for organizational effectiveness.

### Four Factors for Nonprofit Success

Nonprofit HR's EDIJ team has created a model (Figure 1) portraying the four factors for nonprofit success, demonstrating how organizations utilize systems change to intentionally embed EDIJ drivers (transparency, operational accountability, people and culture, and power sharing) to reach optimal effectiveness. Organizational effectiveness lives at the intersection of four crucial factors: mission alignment, financial impact, resources and focusing on people (internally and externally). Ironically, these are the same areas that are often used to fuel arguments against EDIJ. This model is also situated within the context of the current environment.

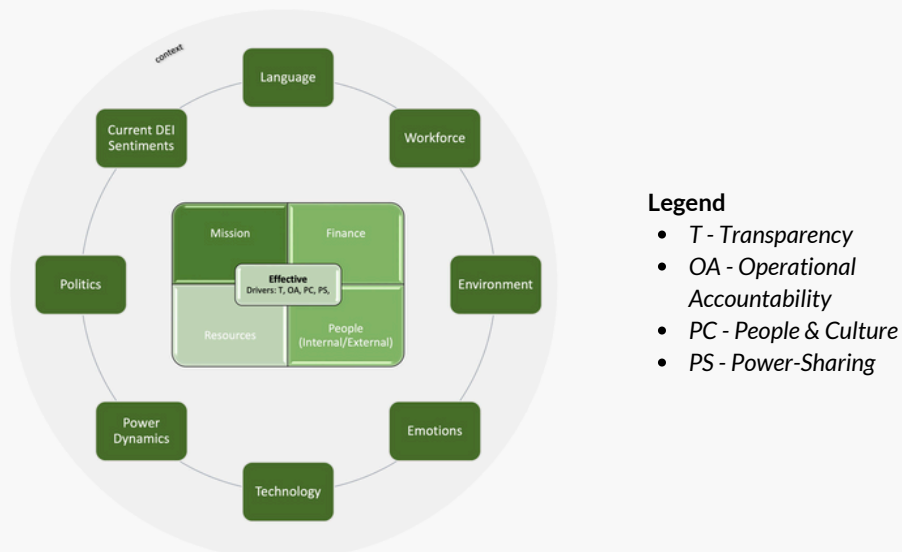
Factors impacting EDIJ in the workplace include current DEI sentiments, language, workforce, environment, emotions, technology, power dynamics and politics. These contexts can either be facilitators or barriers for effectiveness based on how we intentionally engage them. For example, when considering emotions, if a leader or the organization operates out of fear, anger or frustration, they most likely will not be effective in driving the four core factors forward. On the contrary, if the emotion of the leader and organization is one that embraces vulnerability, transparency and accountability, that can drastically influence taking risks and leaning into necessary change to achieve the organization's objectives. The same is true for language. Organizations need to have a pulse on the context of their region, state and nation and choose language that is permissible, relevant and understood to advance the core factors.

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### Drivers

- Transparency
- Operational Accountability
- People & Culture
- Systems Change
- Power-Sharing

### Embedded DEI: Systems Change Approach for Effective Nonprofits



#### Legend

- T - Transparency
- OA - Operational Accountability
- PC - People & Culture
- PS - Power-Sharing

Figure 1

### The Current Landscape

Within the United States, there is a visible political divide and an assumed direct relationship between political affiliation and positive or negative views on EDIJ work. This is something that is portrayed frequently in the media. In reality, political affiliation and EDIJ sentiments are not a one-to-one relationship. In a 2023 study, The Pew Research Center found that most people across political lines are in favor of advancing DEI work, with only a small subset of parties who believe advancing DEI has a negative impact<sup>2,3</sup>. This quantification indicates that the majority of people across political lines have either a position of positive support or a position of neutral support for DEI. This finding does not align to the headlines that would have us assume that DEI is viewed negatively by the majority – but rather this is only the case for a vocal subset of the U.S. population.

When thinking about political navigation from an organizational standpoint, there is a variety of factors that we must consider. Many organizations are situated within states that have mandates against EDIJ-related work. States such as Florida and Texas, among many others, have state legislators actively banning EDIJ initiatives in schools and colleges. For example, in May of 2023, Florida's governor signed a bill into law stating that public colleges and universities are banned from spending money on EDIJ programs<sup>4</sup>, making it challenging to advance work in this area.

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Another piece of the political puzzle is determining the reputation the organization wants to have. Leaders of organizations often worry about losing donor funding based on taking a stance on DEI or on current events impacting the world. In reality, donors are more likely to support organizations that are diverse, equitable and inclusive. According to the 2022 Give.org Diversity, Equity, and Inclusion Donor Trust Special Report, most participants felt that organizations who advanced DEI were more trustworthy and more effective at serving their mission and people. When asked how DEI affects donor perceptions, “53.9% of respondents say they assume DEI has a positive effect on how trustworthy a charity is, while only 4.5% say the effect is negative, and the rest say they do not know (11.6%) or think there is no effect (29.9%). Half or more of participants also think DEI has a positive effect on how well the charity serves its constituents (53%), the charity’s ability to focus on its core mission (53%), the charity’s overall accomplishments (52%), and incorporating broader perspectives and experiences (50%)<sup>5</sup>.”

Moving beyond perceptions, there are also the tangible and quantifiable facts that must be considered as we assess the future of DEI. The Supreme Court’s decision to overturn affirmative action in higher education sent shockwaves through the media, higher education and within organizations. While on the surface this appears to be a significant blow to advancing DEI in the workplace, it actually does not negate the impact that effective DEI initiatives have on organizations. For many years it has been proven that organizations prioritizing DEI at a strategic level experience a positive impact on employee engagement, customer relations and employee retention, just to name a few outcomes<sup>6</sup>. These are the same outcomes measured to assess overall organizational health, so the connection to DEI cannot be ignored.

### Pain Points

Some pain points that nonprofits experience when working to elevate DEI include skewed perceptions of justice — a systemic way to enhance DEI — as political versus humanistic. This means that DEI is posited as a political agenda as opposed to the reality of creating spaces where people feel physical, psychological and emotional safety. Simply put, DEI is necessary for advancing humanity in the context of work and in organizations. Principles such as belonging and inclusion are basic needs and should be guaranteed to all in the workplace<sup>7</sup>. At the end of the day, who doesn’t want to feel valued in the workplace?



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Another common detractor is that EDIJ is sometimes utilized as a band-aid solution for problems and issues within the workplace, where instead of working to address the root cause, organizations react in performative ways<sup>8</sup>. This bandaging was extremely prevalent after the murder of George Floyd. Organizations operated in a reactive manner and took action by creating DEI positions without resourcing that person with leadership buy-in, without evaluating the current culture or by crafting DEI statements, and without the intention for change or action<sup>9</sup>. While DEI positions and statements are critical, organizations need to be ready to dive into transformational work, such as evaluating current cultural practices, systems, policies and processes.

Other pain points include generational differences in the workplace<sup>10</sup>, DEI trauma and fatigue<sup>11</sup>, and a lack of truly understanding EDIJ work and how to achieve organizational culture change. Across generations, there is a different sentiment related to sense of urgency, language and the ideal approach to advancing DEI. Without getting into a laundry list of specific examples, there are obvious differences in the way these generational cohorts communicate, how they view their relationship to the workplace, and the expectations they have of organizations<sup>12</sup>. Organizations that do not understand their unique workforce or work to bridge generational understanding may experience barriers to creating an inclusive and equitable workplace. Framing conversations and the necessity for DEI is crucial for mutual understanding.

Additionally, many of the DEI professionals and staff working to advance DEI are experiencing trauma and fatigue for a multitude of reasons. Navigating and advancing DEI when there are limited resources and pushing back against institutional barriers have led to both exhaustion and a feeling of isolation<sup>11</sup>. Another source of exhaustion, particularly for leaders of color, comes from the heaviness of educating and coaching staff with privileged identities around the importance of DEI and feeling like they must continuously taper what they are saying and how they are saying it<sup>11</sup>. This is especially true when staff within organizations don't truly understand what EDIJ is.

When engaging in EDIJ work, many organizations hyper focus on the diversity aspect. This is often through attention to the necessity for greater representation of staff and leaders of color, or those with historically marginalized or less represented identities, without attention to the current culture, practices or support mechanisms that need to be in place for retention. The reality is that EDIJ goes beyond representation. It includes engaging a systems-change approach to holistically understand barriers that prevent people from feeling psychologically safe and supported across all aspects of an organization, including interpersonal interactions, cultural expectations and policy implications. Power sharing, transparency, operational accountability, and people and culture are all part of the equation (Figure 1).

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While representation is extremely important, it must be paired with understanding equity, inclusion and justice. Without this comprehensive approach to the shift, diversification ends in an experience of tokenization. It also needs to be intersectional and expansive, meaning that organizations should focus on building and supporting a workforce that is representative of communities across race/ethnicity, age, sexual identity, gender identity, disability status and so on. Not only is it the right thing to do, but it is linked to individual and organizational performance. According to Smet et. al from McKinsey & Company, “Unleashing the full human potential in an organization is why forward-looking companies work so hard to create environments of belonging and psychological safety<sup>14</sup>.” These two concepts are part of driving not only employee engagement but also an inclusive work environment. It becomes hard to argue against EDIJ as being a necessity if this work is directly linked to improving metrics such as belonging and psychological safety.

### Engaging Client Needs

These pain points are ones we see over and over again with our clients. Over the last few years, Nonprofit HR's EDIJ team has supported over 500 projects across various organizations, industries and needs. Some of the top issues clients are telling us they need support with include:

- Obtaining buy-in for EDIJ work from their board or from executive leadership
- Understanding the climate of EDIJ within their organization
- Creating an EDIJ strategy with metrics
- Training staff and leadership on how to reduce bias and microaggressions
- Making the case for equity in times of political turbulence
- Supporting the development and launch of employee resource groups
- Supporting the formation and functioning of DEI committees
- Engaging resistance about the potential for losing donors
- Coaching to better understand where their gaps are
- Enhancing recruitment and retention of staff and leaders across identities
- Engaging in thought partnership as they advance EDIJ

Any chance you see your organizational needs on the list? These will remain common needs of organizations as we head into the next few years.

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### The Path Forward

So where do we go from here? With the current headlines, barriers and pain points, it can be easy to throw in the towel. But by doing so, we are failing our people and our missions. In a recent report from Seramount, there is a distinct call to link EDIJ investments to more traditional organizational measures of success such as sales, finance, customer experience, employee experience, talent acquisition and productivity<sup>15</sup>. In alignment with Nonprofit HR's systems-change model on embedding EDIJ (Figure 1), portraying the four factors for nonprofit success (mission, finance, resources and people) and EDIJ drivers (transparency, operational accountability, people and culture, and power sharing), here is what equity-focused organizations can and should do in 2024 and beyond to advance in their EDIJ journey.

#### Get a Pulse on the Organization

Get a pulse on the context of your organization and how people are experiencing the culture, policies and mission. Engage in an assessment or conduct focus groups to better understand your EDIJ wins and challenges. Stay responsive rather than reactionary. Respond to the data through tangible action, elevating the model's drivers. Set metrics and timelines, assign accountable parties, engage multiple stakeholders and communicate consistently.



#### Understand Your Audience

Understand your audience and their engagement language (context). For example, terminology that is relevant in the United States might not be standard nomenclature in different parts of the world or might cause people to push back. Within the last few years, we have seen political pushback against the use of critical race theory in education to the point where organizations, across industries, are afraid to engage in any sort of work on anti-racism. When this sort of barrier arises, lean into the importance and impact of a positive work culture (people and mission). Much of the work of dismantling inequitable systems is about creating environments where people can thrive. Keep steady in your efforts but change your external use of language to ensure you can sustain this critical work. At the end of the day, who would push back against a positive workplace culture?

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### Learn More About Gen Z

Learn more about Gen Z, our newest generation entering today's workforce. Gen Z is setting the culture for future work environments so there is a renewed need for this work to advance from a generational perspective. Lean into the momentum and expertise. It can also lead to dispelling cross-generational myths. When learning more about any group of people, ensure this learning is done from a place of cultural



humility. This can be done by conducting focus groups, building relationships with employees and validating people's experiences. The same is true for staff across all social identities. As a leader, genuinely learn about your staff and get them involved in creating change. This can be done through forming committees and taskforces, and leaning into power sharing and transparency as a leader. Over the course of the past year, one of the biggest takeaways from focus groups conducted by Nonprofit HR's EDIJ team was that employees want to feel valued, heard and understood; that effective communication and transparency about decisions are cornerstone to feelings of belonging. To lean into this, organizations need to have a better understanding of emotional intelligence and the valuable role it plays in effective leadership.

### Lean Into Emotional Intelligence

Learn about and lean into emotional intelligence (EQ). EQ refers to how your own and others' emotions and feelings affect how you experience the world and how you connect and collaborate with other people. This includes understanding our reactions to giving and receiving feedback, understanding how our actions and inactions can influence others, and how we prioritize what matters. In 2024 and beyond, continue to work on self-regulation, especially as it relates to interactions in the workplace and focus on what resistance you might have to advancing EDIJ work. Investing in a coach, participating in a workshop, or conducting a self-audit to better understand your impact are three tangible options for consideration. These steps are highly recommended for anyone, but especially for the most senior leaders within organizations.

### Align EDIJ to Your Mission

Align your EDIJ work to your mission. Elevating your mission is continuous and therefore, advancing EDIJ should be as well. Continue to view EDIJ as ongoing and responsive, rather than reactionary and be open to continual change. Don't wait for something to happen to conduct a training or write a statement. Lean into necessary change even if it's new or challenging.



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Consistently conduct gap analyses to determine what education is needed for your workforce and create a cadence for reviewing policy and practices from an equity lens. Not only does this build trust, but it also enhances the ability to recruit a diverse and qualified workforce and retain them. Applicants are more likely than ever to ask what an organization is doing to advance EDIJ and are more likely to use that as a key determinant for accepting or refusing an offer.

### Allocate Resources

Allocate resources. EDIJ work takes time and commitment. Set a budget for your EDIJ work and embed EDIJ into job responsibilities and performance evaluations. Ensure you are asking what type of resources are needed to advance EDIJ initiatives and then follow through. Provide training and education to skill-up your organization. Make time to evaluate and change processes, policies and behavior that are counter to your mission and the culture your organization desires to have.

### Stay the Course

Stay committed, stay the course and ask for help. There will always be pushback and there will always be other organizational priorities. Reach out to others for support and engage external consultants as needed. Network with other leaders and organizations. By continuously committing to advancing EDIJ in practice, organizations will begin to embed equity into other priorities, ultimately creating higher impact and greater outcomes. Remember, advancing EDIJ in 2024 is not just about doing what is right, it's about doing right by the organization's mission and the people impacted by the organization's existence.

### About the Authors



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Dr. Rachael Forester provides subject matter expert advice, insight and strategic direction to clients. She oversees complex client engagements, manages projects to completion and designs and facilitates EDIJ training solutions and assessment services for partners and stakeholders.

Rachael has been doing equity work in higher education for over a decade. Most recently, Rachael served as the Associate Director of the Office of Identity, Equity and Engagement at UNC Charlotte, where she also obtained her doctoral degree in Educational Leadership in Higher Education, focusing on racial equity. As a critical whiteness scholar, Rachael's research includes understanding and deconstructing whiteness to promote racial equity. In 2020, Rachael started a free, international White accountability group to assist White people in doing critical self-work as change agents for racial equity and to assist organizations in creating transformative equity practice to shift policies, practices, procedures and culture. She also serves on a multi-university research team exploring the experiences of LGBTQ+ identified students' experiences within STEM and has published on the topics of activism, LGBTQ+ experiences and race. In addition, Rachael serves as affiliate faculty for both undergraduate and graduate students, where she teaches on social activism, race and racism, and educational leadership. In 2021, Rachael received the Young Distinguished Alumni Award from her alma mater, SUNY Cortland, as a two-time alumni where she received her master's degree in English as a Second Language and her undergraduate degree in Early Childhood and Childhood Education.



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Our Managing Director for Equity, Diversity, Inclusion & Justice (EDIJ, formerly DEI), Antonio L. Cortes, PhD, is an Industrial/Organizational and Business Psychologist with extensive experience in the nonprofit sector. In his current role, he provides strategic and operational leadership to the EDIJ practice area. Areas of support include Organizational Equity Assessments to uncover oversights in operations that lead to inequities, strategy development to solve unique organizational issues in the EDIJ space, global application of EDIJ concepts for multinational organizations and training on topics such as Building a Business Case for EDIJ, Implicit (Unconscious) Bias, Microaggressions and Systems Theory Application to Workforce Development.

In his previous role at a large national nonprofit, Antonio oversaw national organizational development strategies that contributed to the growth of an existing membership base consisting of three billion dollars in annual revenue across 2,700 U.S.-based locations. Antonio has engaged in EDIJ work focused on improving multiple levels of organizational functioning from personnel development to business model redesign to meet the needs of evolving customer groups. Antonio has significant experience facilitating EDIJ workshops with nonprofit organizations of varying sizes and geographies in addition to serving as an adjunct faculty member leading graduate-level courses in Global HR, Managing Organizational Diversity, Organizational Behavior and Organizational Leadership.

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