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Executive Summary

BIPOC Representation and Leadership Pipelines in the Economic Mobility and Opportunity Field

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BACKGROUND AND INTRODUCTION

In 2021, the Institute for Strategic and Equitable Development (ISED), a nonprofit organization that promotes impactful grantmaking, investments, and economic development in communities of color, received a grant to continue building the knowledge base of Black, Indigenous, and people of color (BIPOC) representation and leadership pipelines in the economic mobility and opportunity (EMO) field. ISED's implementation partner is Keecha Harris and Associates, Inc (KHA), a firm committed to racial equity and rooted in transparency, integrity, and accountability.

The economic mobility field is broad, with the common intent of positively impacting a person or group of people's economic well-being over time.[1] The US Partnership on Mobility from Poverty's definition comprises three core principles: economic success, power and autonomy, and value in the community. According to this definition, people's "power and autonomy – people's sense of control over the trajectory of their lives – and being valued in community – their sense of belonging" are as important as obtaining material wealth.[2] KHA's research used the proposed segmentation of the field using similar terminology – economic security, economic opportunity, and value and belonging.[3]

An integral component of assessing the maturity of the economic mobility field is examining racial equity within the ranks of people working in and leading the sector.[4] A wide range of actors in the mobility field are working to center BIPOC voices in mobility solutions.[5] While it is understood that BIPOC voices could be better represented within institutions focused on increasing mobility from poverty, there remains a shallow research base on the current state of BIPOC representation in the mobility space.

The intent of this current study is to:

- Determine priority areas to increase BIPOC presence, equity, inclusion, and belonging within key stakeholder groups;

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[1] "What Is Economic Mobility?" The Bell Policy Center, accessed November 5, 2021, **https://www.bellpolicy.org/what-is-economic-mobility/**.

[2] Gregory Acs et al., *Measuring Mobility from Poverty,* April 2018, **https://sparqtools.org/wp-content/uploads/2018/06/measuring_mobility_paper.pdf**.

[3] Economic security: meeting essential needs, mitigating instability, and ensuring the baseline of autonomy required to plan for the future (e.g., housing, safety nets, health, family welfare); economic opportunity: increasing economically valuable skills and qualifications, raising earning potential, and advancing bases of financial health (e.g., education, work, financial well-being); and value and belonging: defining the economic paradigms and practices that ensure economic dignity, influence, and inclusion (e.g., economic paradigms, democracy and civic engagement, criminal justice, networks, infrastructure).

[4] Racial equity is defined as "the condition that would be achieved if one's racial identity no longer predicted, in a statistical sense, how one fares." Work that addresses the root causes of racial inequities includes "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, quoted by "Racial Equity Tools Glossary," Racial Equity Tools, 2020, **https://www.racialequitytools.org/glossary**.

[5] BIPOC (Black, Indigenous, and people of color) is not a term that resonates with everyone – this is an evolving lexicon. KHA started its work using the term "people of color." Some Indigenous people felt that this term did not reflect their experience. In this dynamic environment, KHA wants to convey that its work speaks to all people who are marginalized due to their degrees of non-proximity to whiteness. KHA's intention is that the term "BIPOC" includes Asian and Latino/Latina/Latinx people as well as other racially and ethnically under- and misrepresented groups.

- Enhance understanding of existing BIPOC-focused talent pipelines and models to uplift and support BIPOC leaders; and
- Identify where new models may be needed.

These research areas were addressed through desk research of the field; diversity, equity, and inclusion (DEI) data set analysis; a survey of organizations in the field; interviews with organizations in the field; and an external reviewer group discussion. In this summary, the term "talent pipeline" is used to describe BIPOC applicants to various organizations in the mobility field.

CONCLUSIONS

BIPOC leaders, specifically Black, Latino/Latina/Latinx, and Native American people, are likely underrepresented in economic mobility-focused leadership positions. These groups are overrepresented in poverty, and the available economic mobility workforce data indicate that leadership percentages for Black and Latino/Latina/Latinx workers are at or well below the percentages of these groups in the workforce (12.1% and 17.6%, respectively) and far below the percentages of these groups in poverty (23.8% and 28.1%, respectively). KHA concludes that:

- Data about BIPOC representation in economic mobility leadership do not exist in one aggregated location. In instances where these data are present, decision-makers are unsure of how to draw conclusions from them or determine the usefulness of the data.
- There is a disconnect between intent to reduce racial disparities and action. Some note that the root cause is unwillingness to shift a seemingly finite amount of power.
- An organization's heightened attention to representation is risky for the BIPOC staff if the organization does not go beyond tokenism.
- A funding gap exists between BIPOC-led and white-led organizations.

Talent pipelines either do not exist, are narrow, or start and end at the wrong place. They are also often singularly focused on representation and not on inclusion or equity. Interviewees shared the need to widen the pipeline at the beginning. KHA concludes that:

- Leadership attitudes about inclusion and power-shifting are important.
- Hiring managers must be intentional about either casting the widest net possible or casting it in a different direction. While some hiring managers have the knowledge and desire to do this, they also need to work within organizations that support their strategies for attracting and retaining representative talent.

- Discussions of strategies to create a more robust pipeline are not immediately obvious but could be occurring in more informal ways.
- Strategies to maintain a diverse pipeline must be implemented at all points in a hiring process.

INSIGHTS AND RECOMMENDATIONS

Through the research process, KHA gleaned insights into the field and now recommends priority areas to focus on as the field plans for the future. Insights and recommendations can be categorized into two distinct areas – representation and talent pipelines.

Representation Insights

Representation, particularly race and socioeconomic status, in the leadership and workforce of economic mobility is important. One reason, particularly important to economic mobility programming, is building a workforce that community members respond to and trust. Practitioners have found race and ethnicity to be a part of building trust. Another reason relates to the business case for diversity; it is inefficient to engage in identifying, planning, or implementing a solution without the benefit of diversity of thought and experience.[6] One survey respondent shared, "The voices of a single demographic taint the success of the project; involving and gathering the diverse thoughts and insights of others makes for a dynamic level of enriching conversation and perspectives." Last, BIPOC diversity leads to financial returns and higher worker performance for organizations.[7,8] Recommendations related to representation are:

Continue to prioritize the gathering of and providing access to useful and reliable data about leadership in the field.

Data regarding BIPOC leadership in the broader economic mobility field are limited, and where they exist, they are not easily accessible. Accessibility to reliable data is key to broad field knowledge and use. Economic mobility-focused philanthropic organizations should consider methods to increase demographic data collection on the staffs and boards of grantees. Creation of a publicly accessible demographic database with standardized categorization could increase access to reliable data and also has the potential to reduce the time spent by field organizations collecting and reporting data to different granting organizations.

[6] Bernardo M. Ferdman et al., "Collective Experience of Inclusion, Diversity, and Performance in Work Groups," *RAM. Revista De Administração Mackenzie* 11, no. 3 (2010): pp. 6–26, **https://doi.org/10.1590/s1678-69712010000300003**.

[7] Vivian Hunt, Dennis Layton, and Sara Prince, "Why Diversity Matters," McKinsey & Company, January 1, 2015, **https://www.mckinsey.com/business-functions/organization/our-insights/why-diversity-matters**.

[8] Myung Jin, Jaeyong Lee, and MiYoung Lee, "Does Leadership Matter in Diversity Management? Assessing the Relative Impact of Diversity Policy and Inclusive Leadership in the Public Sector," *Leadership & Organization Development Journal* 38, no. 2 (2017): 303–319, **https://doi.org/10.1108/LODJ-07-2015-0151**.

Help build the knowledge base on how to use data to address systemic inequities.

This survey and the set of interviews were not unique, in that respondents readily noted the field's discomfort and lack of experience with collecting and using data to address systemic inequities. Respondents noted improper data utilization, specifically around acknowledging systemic inequity as an unsuccessful field strategy to amplify BIPOC voices and power in economic mobility solutions. Resources targeted to nonprofits and governments on ethical collection of reliable data, responsible publication and sharing of data, measurement of organizational inclusivity, and ways to review and act on results could be of use to those looking to understand the impacts of and change their current structures and practices. Notably, respondents also stated that data use was not a strategy that would be useful. Conclusions on utility could be linked to lack of knowledge about or support in data use.

Combat tokenism by transferring power to BIPOC leaders and staff.

Research has shown that this tokenism is a reason people move on to other professional opportunities, leaving the organization in the same ineffective space of underrepresentation of BIPOC leaders. When representation of identities is where an organization's diversity efforts begin and end, BIPOC staff risk being valued solely for their identities. According to the Harvard Business Review, "In embracing a broader view of diversity, which considers social identities alongside skills, experiences, thinking styles, interests, and values, [organizations] can build a greater appreciation for cultivating inclusive cultures."[9] As a practical matter and good place to start, hiring rubrics should exist, be expansive enough to allow for detecting thinking styles, be inclusive enough to not privilege education over experience, and be nuanced enough to appropriately value diverse experiences. Both influential field organizations and philanthropies can model these practices.

Several interviewees noted that the nature of philanthropic support could go beyond contributing financially to demonstrating good practices. Just as people in impacted communities can detect when an organization seeking to provide services does not have representative leadership, grantees and partners detect when the people they observe on a brochure have real power within a foundation. One of the difficult balancing acts organizations have, particularly if they are traditionally white-led, is developing a practice of true inclusivity and power-shifting. As long as BIPOC leaders remain underrepresented, there is a risk of expecting a person to represent an entire group.

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[9] Simran Jeet Singh, "Boards Need Real Diversity, Not Tokenism," *Harvard Business Review*, August 31, 2021, **https://hbr. org/2021/08/boards-need-real-diversity-not-tokenism**.

Sustainably support and sponsor BIPOC-founded and -led organizations.
The path to field leadership does not have to go through traditional organizations. BIPOC-led organizations were overrepresented in the lowest revenue quartile of this study's sample. If equity in funding existed, then the ideas and strategies of these organizations could move toward having greater influence. Equity in funding is also about more than the actual dollars at any single point in time; it is about sustained transformational support and sponsorship across a few stages of an organization's life cycle. Nonfinancial support includes engaging these organizations in broader networks, creating more open-source tools, and championing their public policy priorities.

Talent Pipeline Insights
Talent pipelines to leadership in the mobility field either do not exist, are narrow, or start and end at the wrong place. Interviewees shared the need to widen the pipeline at the beginning. Examples of these barriers include:

- Where talent pipelines do not exist - Creating pipeline points of entry are key to increasing inclusion in the sector. If the primary way of finding new potential employees is through an internship program, the program must draw from as broad a group of students as possible or focus specifically on underrepresented groups. While some organizations have the knowledge and desire to do this, they also need to work within organizations that support their strategies for attracting and retaining representative talent.

- Where talent pipelines are narrow - Another narrow aspect of pipelines is the temptation to focus solely on representation, when focus on inclusivity will garner more sustained results.

- Where talent pipelines start at the wrong place - Several interviewees described the current start of the pipeline as being too late to really attract people within impacted communities. College is too late, particularly since postsecondary education is not a given.

- Where talent pipelines end at the wrong place - The pipeline does not just run to the entry point of the field. In order for people to be successful, support must exist throughout their tenure in the organization, and they must continue on to the leadership and policy-making level of the field.

Recommendations related to talent pipelines are:

Provide operational support to organizations geared toward shifting the grantee's organizational culture. This includes providing capacity building support to address racial inequities. The federal government makes available some data about the applicant pool in each step of a hiring process, from application to hire. If one only looks at the beginning and the end, the primary observation is that while Black people are generally

overrepresented in the application stage, they are underrepresented at the hiring stage. A look into each step, however, helps pinpoint the place where there is an outsized number of Black applicants being removed from the process. Since that can be pinpointed as the time between a recommendation from human resources and a manager's decision to invite an applicant for an interview, agencies can understand where to provide internal capacity building and bias training. Grantees and partners do not typically have the human resources support that exists in the federal government and could need assistance in developing a way to look at the hiring process through the lens of representation.

Develop a way to learn from people who have been told "no" when seeking leadership positions. While the sector as a whole does not have direct relationships with people in impacted communities, grantees, subgrantees, and partners in the field should. Interviewees noted that the best people to discuss barriers to entry would be people who were barred from entry. This would add nuance to the observations and experiences of people who eventually gained entry, including identifying tokenism, stereotypes, lack of mentorship, and lack of networks as barriers. This helps understand what levers might need to be pulled and when. Those included in this process should be compensated for their time and contributions.

Encourage discussion at conferences and convenings of racial equity and strategies to develop a more representative workforce. Conferences are the spaces where people convene to hear about and workshop different ideas. While survey respondents and interviewees provided insights on strategies to increase representation, interviewees paused at the term "field strategies" in the question. They shared the idea that a strategy adopted by a critical mass of organizations in the field is a foreign concept. There is little discussion in the field about what works.

Fund adaptable organizations with leaders enthusiastic about representative leadership. The success of diversity programs is contingent on enthusiastic leaders who institute diversity as a central mission of the organization. While diversity initiatives do not automatically lead to higher job satisfaction, particularly for BIPOC employees, leadership as it relates to these initiatives makes a difference. In addition, organizations most likely to successfully become inclusive and transfer power are those that have traditionally adapted well to societal shifts.

Direct funding to places of great influence where underrepresentation is proven. Evidence exists that some fields with great influence in the economic mobility field also suffer from underrepresentation of BIPOC leaders (e.g., economists in academia and high-level government). As data allow for more identification of underrepresentation in certain categories, philanthropy should also direct funding to those categories.

RESULTS

The results of the literature review, desk research, survey, and interviews are presented below and divided into six sections. The first three relate to BIPOC representation in economic mobility leadership – the current state of racial representation, strategies to improve representation, and outcomes from improving representation. The second three relate to talent pipelines – the current state of talent pipelines into the field, challenges faced by potential leaders, and pipeline success.

Current State of Racial Representation

Racial representation within the economic mobility field was examined using research questions addressing actual and perceived representation, networks, successful strategies, measurement, and outcomes. The results show that BIPOC leaders are underrepresented in leadership (Table 1), that successful strategies exist but are not widely adopted, and that the best indicator of success for these strategies is sustained representative leadership.

TABLE 1. LEADER AND STAFF RACE/ETHNICITY (N=3,489)

CANDID RACE/ ETHNICITY CATEGORY	NUMBER OF LEADERS/ CO-LEADERS	PERCENTAGE OF LEADERS/ CO-LEADERS	NUMBER OF TOTAL STAFF	PERCENTAGE OF TOTAL STAFF	AMERICAN WORKFORCE PERCENTAGE*	SHARE OF POVERTY**
White/Caucasian/ European	2,673	67.4%	20,570	37%	78.0%	41.6%
Black/African American/ African*	**533**	**13.4%**	**14,177**	**25%**	**12.1%**	**23.8%**
Hispanic/Latino/ Latina/Latinx	**283**	**7.1%**	**10,857**	**19%**	**17.6%**	**28.1%**
Decline to state	162	4.1%	1,701	3%	N/A	N/A
Asian American/ Pacific Islanders/ Asian	**134**	**3.4%**	**3,123**	**6%**	**6.4%**	**4.3%**
Multiracial/ multiethnic (2+ races/ethnicities)	99	2.5%	1,531	3%	N/A	N/A
Other	83	2.1%	236	0%	N/A	N/A
Native American/ American Indian/ Indigenous	38	1.0%	423	1%	N/A	N/A
Unknown	6	0.2%	926	2%	N/A	N/A
TOTAL	**4,011**		**53,544**			

* U.S. Bureau of Labor Statistics, "Household Data Annual Averages; Employed Persons by Detailed Industry, Sex, Race, and Hispanic or Latino Ethnicity," accessed November 9, 2021, **https://www.bls.gov/cps/cpsaat18.pdf**. The values in this column are for respondents who are 16 years or over. People whose ethnicity is identified as Hispanic or Latino/Latina/Latinx may be of any race and are included as such (e.g. they could be included more than once).

** Source for "Share of Poverty": The 2020 U.S. Census Bureau's Annual Social and Economic Supplement includes only white, Non-Hispanic; Black, Hispanic; and Asian. See John Creamer, "Poverty Rates for Blacks and Hispanics Reached Historic Lows in 2019: Inequalities Persist Despite Decline in Poverty for All Major Race and Hispanic Origin Groups," U.S. Census Bureau, September 15, 2020, **https://www.census.gov/library/stories/2020/09/poverty-rates-for-blacks-and-hispanics-reached-historic-lows-in-2019.html**. FPL% was not noted.

*** Bold rows are the race/ethnicity categories that are underrepresented in leadership relative to share of poverty.

Strategies to Improve Representation

Elimination of practices that exclude BIPOC voices is a marker of racial equity. Interviewees were asked to identify three elements that equitable economic mobility organizations should include internally and externally. Representative leadership, clear strategy, and a desire to learn are the key elements identified to be included in an internally and externally equitable economic mobility organization (Figure 1). While representative leadership is a key element of an inclusive organization, the literature on strategies to increase representation in economic mobility is limited.

FIGURE 1. ELEMENTS THAT INTERNALLY AND EXTERNALLY EQUITABLE ECONOMIC MOBILITY ORGANIZATIONS SHOULD INCLUDE (N=10)

Outcomes from Improving Representation

There is a body of literature grounded by the assumption that leaders can use diversity in the public and private sector as a way to achieve positive results, including better work group performance, job satisfaction, and workforce stability[10]. Survey respondents

[10] Vivian Hunt, Dennis Layton, and Sara Prince, "Why Diversity Matters," McKinsey & Company, January 1, 2015, **https://www.mckinsey.com/business-functions/organization/our-insights/why-diversity-matters**.

discussed the impact of increasing racial representation to strengthen the success of and increase their organizations' impact in the economic justice, poverty alleviation, or economic mobility field. The top responses included: the importance of having various perspectives, the importance of community voice, access to knowledge, and assistance to reduce blind spots. Interviewees unanimously agreed that a racially and ethnically diverse economic mobility workforce accelerates the accomplishment of goals. Interviewees also shared ways that increasing racial representation can increase organizational impact in the field (Table 2).

TABLE 2. WAYS THAT INCREASING RACIAL REPRESENTATION CAN INCREASE ORGANIZATIONAL IMPACT IN THE FIELD (N=10)

THEME	QUOTE	COUNT
Underscores the value of community voice	"A connection to the communities that we serve and an understanding of the community and the poverty issues that they face."	7
Changes the way we look at data	"…diversity has pushed into stratifying the data in different ways."	2
Puts inclusive strategies into place	"Having greater racial diversity on the leadership team and governance/advisory boards will help shape a more inclusive strategy."	2

Current State of Talent Pipelines into the Field

The current state of BIPOC pipelines is largely in flux. There is no set standard for BIPOC pipelines and thus no standard for pipelines into the key mobility domains. There is a dearth of research that focuses on BIPOC pipelines in mobility, suggesting the need for more academic focus on mobility fields and more transparency in reporting hiring processes from mobility fields. However, there are trends in the recruitment practices of organizations to attract BIPOC applicants. There is a tendency to focus on BIPOC representation, rather than inclusion.

One of the largest findings is that representation is just a single piece of the story. Many companies laud increased diversity while neglecting the needs of BIPOC employees and leaders once they are hired. One of the reasons for the overemphasis on representational diversity, or the raw numbers of BIPOC staff in organizations, is that it serves as an easy measure for progress. Yet critics argue that an overemphasis on representation deflects from a critical focus on new ways of thinking and carrying out an organization's mission.[11] Pipelines must focus on inclusion and equity, akin to the focus on representation to retain BIPOC employees.

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[11] Judith Y. Weisinger, Ramón Borges-Méndez, and Carl Milofsky, "Diversity in the Nonprofit and Voluntary Sector," *Nonprofit and Voluntary Sector Quarterly* 45, no. 1_suppl (2016): 3S–27S, **https://doi.org/10.1177/0899764015613568**.

While some organizations are making use of racially targeted strategies to expand their talent pipeline and increase the number of BIPOC employees, racial demographics of people in the pipeline are opaque in the academic literature for two reasons. First, companies are selective about revealing racial demographics of staff members. The data on racial representation in organizations suffer from self-selection, as organizations that volunteer to provide such information usually have larger numbers of BIPOC employees than those that do not. Second, internal review boards (IRBs) at universities usually require anonymity of research participants, including organizations. Therefore, it is nearly impossible to ascertain racial representation within individual pipelines. Academic literature also lacks data on the racial breakdown of who benefits from pipelines, generally referring to all beneficiaries as minorities.

The attitudes toward BIPOC-focused pipelines seem to be mixed. There continues to be an assumption that increasing diversity means sacrificing performance goals.[12] Some companies complain of limited diversity among their candidate pools.[13] Research also considers what motivates firms to invest in DEI initiatives. While they continue to face mounting pressure from the public, firms do not seem to be motivated by opinions of the general public or even by the lack of diversity within their organizations.[14] The greatest predictor of firms addressing DEI issues is their past commitment to adapting to new social norms.[15] This finding points back to the role of organizational culture and the impact of leaders. Table 3 displays survey respondent ratings of methods organizations use to learn about employment candidates and communicate professional opportunities with leaders in the field.

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[12] Daniel A. Newman and Julie S. Lyon, "Recruitment Efforts to Reduce Adverse Impact: Targeted Recruiting for Personality, Cognitive Ability, and Diversity," *Journal of Applied Psychology* 94, no. 2 (2009): 298–317, **https://doi.org/10.1037/a0013472**; and Paolo Gaudiano, "How to Increase Diversity without 'Lowering the Bar,'" Forbes, October 23, 2017, **https://www.forbes.com/sites/paologaudiano/2017/10/23/how-to-increase-diversity-without-lowering-the-bar/?sh=4fdd6f1f6581**.

[13] Quoctrung Bui and Claire Cain Miller, "Why Tech Degrees Are Not Putting More Blacks and Hispanics into Tech Jobs," *The New York Times,* February 25, 2016, **https://www.nytimes.com/2016/02/26/upshot/dont-blame-recruiting-pipeline-for-lack-of-diversity-in-tech.html**.

[14] Clayton S. Rose and William T. Bielby, "Race at the Top: How Companies Shape the Inclusion of African Americans on Their Boards in Response to Institutional Pressures," *Social Science Research* 40, no. 3 (2011): 841–59, **https://doi.org/10.1016/j.ssresearch.2010.10.007**.

[15] Frank Dobbin, Soohan Kim, and Alexandra Kalev, "You Can't Always Get What You Need: Organizational Determinants of Diversity Programs," *American Sociological Review* 76, no. 3 (2011): 386–411, **https://doi.org/10.1177/0003122411409704**.

TABLE 3. RATING OF METHODS ORGANIZATIONS USE TO LEARN ABOUT EMPLOYMENT CANDIDATES AND BIPOC EMPLOYMENT CANDIDATES AND COMMUNICATE PROFESSIONAL OPPORTUNITIES WITH THE LEADERS AND BIPOC LEADERS IN THE FIELD (N=23)*

QUESTION	NOT EFFECTIVE AT ALL	SLIGHTLY EFFECTIVE	MODERATELY EFFECTIVE	VERY EFFECTIVE	EXTREMELY EFFECTIVE	NOT APPLICABLE
We seek out people whose work aligns with our programmatic goals.	0.00%	0.00%	30.43%	30.43%	**39.13%**	0.00%
We seek out BIPOC leaders whose work aligns with our programmatic goals.	0.00%	8.70%	21.74%	**39.13%**	30.43%	0.00%
We sponsor training programs (e.g., fellowships, internships), and we hire from that pool of candidates.	0.00%	8.70%	13.04%	**34.78%**	21.74%	21.74%
We sponsor programs (e.g., fellowships, internships) dedicated to training BIPOC individuals, and we hire from that pool of candidates.	0.00%	4.35%	8.70%	17.39%	30.43%	**39.13%**
We rely on our peers to engage with and introduce us to people previously unknown to us.	4.35%	8.70%	17.39%	**43.48%**	26.09%	0.00%
We seek out and join BIPOC-serving networks of organizations.	4.35%	4.35%	17.39%	**26.09%**	**26.09%**	21.74%

*This table presents data collected from two different questions. The shaded rows group similar statements across the two questions.

Challenges Faced by Potential Leaders

BIPOC leaders and workers face a variety of challenges entering the workplace. While much of this research does not speak to the mobility field specifically, the research on BIPOC experiences in majority-white spaces still presents useful insights. A long-standing challenge and experience for BIPOC staff in majority-white organizations is that of tokenism. Tokenism describes the process by which BIPOC employees are treated as representatives for their social group (e.g., race, gender) within an organization.[16] Their voices are presumed to represent those of all members of their group. A key element of

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[16] Rosabeth Moss Kanter, "Some Effects of Proportions on Group Life: Skewed Sex Ratios and Responses to Token Women," *American Journal of Sociology* 82, no. 5 (1977): 965–90, **https://doi.org/10.1086/226425**.

tokenization is the limited number of minorities within an organization, a process that allows stereotypes and the presumption of group homogeneity to flourish. The long-term impact of tokenism is what researchers now describe as tokenization fatigue.[17]

Tokenization fatigue impacts minorities, particularly women of color, when their voices are minimized and when they make up a small proportion of the organization. BIPOC staff describe lack of community and the need to expend additional time, effort, and energy within organizations. Tokenization fatigue can contribute to negative physical, social, and emotional well-being of BIPOC employees and leaders. Since tokenization is contingent upon there being few minority members within an organization, increasing the number of minority members is one way to reduce the effects of tokenization. Researchers find that boards that achieve "a critical mass of ethno-racial diversity" increase performance.[18] However, for companies to be successful, they must have organizational cultures that support newfound diversity and employees of color.

Pipeline Success

Many of the issues BIPOC staff face reflect the unequal focus when discussing DEI work. Companies hire BIPOC employees yet neglect them once they enter an organization. Researchers have taken note of this trend and have produced suggestions for companies to enhance inclusion within their organization.

Scholars have cited a number of recommended suggestions to increase diversity and change organizational culture. Chief among them is focusing on the role of leadership. The literature finds that leaders have an overwhelming impact on the success of diversity and inclusion programs.[19] Leadership includes heads of individual teams within an organization or board members of an organization. Scholars suggest that boards recognize that diversity and inclusion are more than just the numbers of people of color but are instead a shift in organizational culture. Company leaders, also described as champions, are integral to this change. Leaders set the tone and pace of an organization. Those who make transformation of organizational culture a central component to their operations are able to reap the benefits of diverse work spaces. Without leaders on board, companies risk division and slowed productivity.

Companies must prepare leaders to lead diverse work groups. Companies should seek to reach an inclusion breakthrough, described as a shift in organizational culture that results

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[17] J. Shim, "Token Fatigue: Tolls of Marginalization in White Male Spaces," *Ethnic and Racial Studies* 44, no. 7 (2021): 1115–34, **https://doi.org/10.1080/01419870.2020.1779947**.

[18] Christopher Fredette and Ruth Sessler Bernstein, "Ethno-Racial Diversity on Nonprofit Boards: A Critical Mass Perspective," *Nonprofit and Voluntary Sector Quarterly* 48, no. 5 (2019): 931–52, **https://doi.org/10.1177/0899764019839778**.

[19] Dawn E. Chanland and Wendy Marcinkus Murphy, "Propelling Diverse Leaders to the Top: A Developmental Network Approach," *Human Resource Management* 57, no. 1 (2018): 111–26, **https://doi.org/10.1002/hrm.21842**; Fredette, Bradshaw, and Krause, "From Diversity to Inclusion"; Claire McCarty Kilian, Dawn Hukai, and C. Elizabeth McCarty, "Building Diversity in the Pipeline to Corporate Leadership," *Journal of Management Development* 24, no. 2 (2005): 155–68, **https://doi.org/10.1108/02621710510579518**; John P. Kotter, *Leading Change* (Boston: Harvard Business Review Press, 2012); Dyana P. Mason, "Diversity and Inclusion Practices in Nonprofit Associations: A Resource-Dependent and Institutional Analysis," *Journal of Public and Nonprofit Affairs* 6, no. 1 (2020): 22–43, **https://doi.org/10.20899/jpna.6.1.22-43**; and Rivera, "Diversity."

in all members feeling valued and vital to the organization's success.[20] Thus, social and functional inclusion is necessary for a healthy organization that reaps the advantages of a diverse working group.[21] To reach this goal, researchers suggest that minorities 1) must receive access to organizational discussions and decisions; 2) must be given responsibility for organizational affairs; and 3) must have opportunities to conduct both creative and meaningful work in the organization.[22]

Survey respondents rated the value of a list of proposed strategies to amplify BIPOC voices on a scale of 1 to 5, with 1 being not at all valuable and 5 being very valuable to advancing their organizations' economic justice, poverty alleviation, or economic mobility goals. Table 4 displays the range and average for each strategy.

TABLE 4. RATING OF PROPOSED STRATEGIES TO AMPLIFY BIPOC VOICES TO ADVANCE ORGANIZATIONAL ECONOMIC JUSTICE, POVERTY ALLEVIATION, OR ECONOMIC MOBILITY GOALS (N=25)

STRATEGY	RANGE	AVERAGE
Engaging the voices of communities – especially BIPOC individuals – and ceding some decision-making power to those communities	3-5	4.40
Increasing the knowledge base on equity and systemic inequality strategies within the mobility field	2-5	4.16
Diversifying the demographics of final decision-makers within philanthropic organizations	1-5	4.08
Prioritizing internal organizational diversity, equity, and inclusion efforts in strategic plans and action plans within your organization	2-5	4.08
Establishing, expanding, and utilizing networks for Black and Brown professionals within the field	2-5	4.00
Diversifying the state and local workforce	2-5	3.96
Establishing and supporting evidence-based recruitment strategies and pipeline opportunities to increase BIPOC leadership within organizations and stakeholder groups (e.g., local decision-makers, philanthropic organizations, community-based organizations, etc.)	1-5	3.92
Establishing funding goals and priorities specific to BIPOC-led organizations and communities	1-5	3.92
Investing in community-driven economic justice/poverty alleviation campaigns	1-5	3.80
Collecting and utilizing staff demographic data – including from other peer organizations – to inform staffing decisions within your organization	1-5	3.32

[20] Kristina A. Bourne, "The Inclusion Breakthrough: Unleashing the Real Power of Diversity," in *Understanding and Managing Diversity: Readings, Cases, Exercises,* eds. Carol P. Harvey and M. June Allard, 4th ed. (Upper Saddle River, NJ: Prentice Hall, 2009), 263–70.

[21] Fredette, Bradshaw, and Krause, "From Diversity to Inclusion."

[22] Weisinger, Borges-Méndez, and Milofsky, "Diversity."

METHODOLOGY

The research questions guide examination of BIPOC representation in, and talent pipelines to, the economic mobility workforce. Table 5 presents representation-focused research questions, and Table 6 presents pipeline-focused research questions.

TABLE 5. REPRESENTATION RESEARCH QUESTIONS

Current Representation What is the current state of BIPOC representation in leadership positions in organizations within specific impact areas of the mobility field?	**Existing Data Sets** What data sets currently exist around BIPOC representation among leadership in mobility, and can those data sets be used to gather a broader picture of representation?	**Leader Networks** What are the networks of leaders in each of the issue areas, and is the engaged membership of these networks representative of the field as a whole?
Examples of Practice What examples exist that have effectively increased representation within their organization, and what lessons can be learned for how other organizations might begin to make this shift?	**Commonalities** Are there any common components of organizations that effectively include BIPOC voices?	**Performance** What is the link between organizational performance and increased BIPOC representation?

TABLE 6. PIPELINE RESEARCH QUESTIONS

Existing State of Pipelines What is the existing state of BIPOC-focused talent pipelines into key mobility domains?	**Field Attitudes** What are the field's attitudes toward and outstanding questions regarding BIPOC-focused talent pipelines?	**Challenges and Barriers** What are the challenges and barriers that emerging and current BIPOC leaders face as they enter the mobility field?
Success What does success look like for promoting emerging BIPOC leaders?	**Promising Models** What are the most promising models that philanthropies can support to lift BIPOC voices within the field of mobility across the continuum of recruiting, retaining, and promoting?	**Pipeline Racial Representation** What is the racial representation of the participants in these pipelines and within the organizations and networks engaged in those pipelines?

KHA's approach to addressing these questions contained five components, which are summarized in Table 7 below. Each method was intended to provide a more nuanced understanding of the knowledge gained from the methods it followed (e.g., survey question options were based on literature review findings).

TABLE 7. PROJECT METHODOLOGY

COMPONENT	OBJECTIVE	DESCRIPTION
Literature review	Identify and summarize existing research on BIPOC representation and talent pipelines through a review of databases of popular and academic literature using keywords based on prior knowledge, the previous evaluation, conversations with EMO staff, and the request for proposals. Identify gaps in research, and fill some of them through original research, survey, and interviews.	Representation – 8 keywords searched in 12 databases. Pipeline – 15 keywords searched in 13 databases.
Diversity, equity, inclusion (DEI) data set analysis	Obtain an understanding of BIPOC representation at the board and executive director levels of EMO-focused not-for-profit organizations through an analysis of organizational DEI data submitted to Candid.	76,665 organizations total; 3,489 submitting DEI data on executive director; 2,239 submitting DEI data on board.
Survey*	Obtain perception-based and factual data about selected organizations and the field.	91 people invited; 28 recorded responses (30.8%); $25 stipend; launched on October 4, 2021, and closed on October 25, 2021.
Interviews*	Obtain perception-based data about selected organizations and the field, and ground-truth early survey results through semi-structured interviews of geographical and sectoral diverse interviewees.	52 invited; 11 interviewed; $200 honorarium.
External reviewer group discussion	Determine if the report resonates with experienced practitioners, and obtain insight on how the information can add value to the field.	3 practitioners invited after expressing willingness during the interviews; $200 honorarium.

* Survey and interview invitees were a combination of Gates Foundation grantees, relevant KHA contacts, and people identified during the literature review and a targeted search to fill some geographic and sectoral holes. KHA staff used QSR International's NVivo software to analyze qualitative data collected during the survey and interviews. Emergent thematic coding was used to identify themes in the interviews, and open-ended survey responses with probing questions were used as a guide. Codebooks were established across data sources and compared for final analysis. For quantitative data collected during DEI data set analysis, the survey, and the interviews, Microsoft Excel was used in the analysis.