Case Study

Advancing Diversity, Equity, and Inclusion Through Cohorts

The impact of the Willamette River Initiative (WRI) in diversity, equity, and inclusion (DEI) was substantial and occurred in a relatively short period of time.

In late 2015, about two-thirds of the way into the WRI’s 10-year funding commitment, the WRI adopted a strategic goal to advance diversity, equity, and inclusion in the collective Willamette River restoration effort. Through Meyer Memorial Trust’s learning process and redesign to focus on equity, WRI staff acknowledged that the Initiative was framed by a dominant culture view of the environment and served a grantee base of mainstream, white-led conservation organizations. They recognized that this was unjust and not inclusive of the Willamette Basin’s diverse communities. They recognized that many of the communities most impacted by unhealthy river conditions have been marginalized and excluded from decision-making about river health. The WRI also
recognized that they had little time remaining to address such a significant issue and took an approach that prioritized learning and relationship-building. With this aim, the WRI funded projects to increase understanding of the disproportionate benefits and impacts of river health and diverse perspectives and values regarding the river. It also supported organizations advancing DEI in their work, including education, leadership development, and participation in river health-related efforts for youth of color and Indigenous youth.

One of the primary approaches the WRI employed to advance DEI was investing in cohort-based learning experiences. The cohort model emerged through collaboration with DEI consultants who recognized the value of cohorts to build a supportive community to learn, reflect, and create change together. The cohort model was also familiar to the WRI. The Willamette Model Watershed Program had used a cohort model for several years previously and demonstrated the benefits of bringing leaders together in a way that balanced individualized attention with shared learning.

The WRI invested in two versions of cohorts focused on DEI. Each came about in different ways and served the needs of different communities. One served the unique needs of leaders of mainstream dominant culture environmental organizations. The other served leaders of color and Indigenous leaders of community-based organizations working to provide culturally relevant environmental education. The Center for Diversity and the Environment (CDE) cohorts brought together mainstream, primarily white leaders, and the Bridging the Gap cohort brought together leaders of color and Indigenous leaders. While these cohorts were intentionally different in design and outcome, they shared elements that built a supportive community among participants and created meaningful experiences for the participating leaders.

DEFINITION

Diversity, Equity, and Inclusion
These three concepts are distinct but are often discussed together.

Diversity is the range of human differences, including but not limited to race, ethnicity, nationality, religion, socioeconomic status, education, marital status, language, age, gender, sexual orientation, mental/physical ability, and learning styles. A diverse group, community, or organization is one in which a variety of social and cultural characteristics exist (The National Multicultural Institute).

The WRI adopted Meyer’s definition of equity, which was “the existence of conditions where all people can meet their full potential.” As a principle, equity acknowledges that there are historically underserved and underrepresented populations, and that fairness regarding these unbalanced conditions is needed to assist equality in the provision of effective opportunities to all groups (UC Berkeley Initiative for Equity, Inclusion, and Diversity).

Inclusion is the act of creating environments in which any individual or group can be and feel welcomed, respected, supported, and valued to fully participate (UC Berkeley Initiative for Equity, Inclusion, and Diversity).
The CDE Cohorts

Purpose and Design
The WRI funded two years of cohort-based learning led by CDE for WRI core grantees. Because the WRI was formed with a mainstream, dominant culture approach to river restoration, this was a group of white-led organizations, and the cohorts were predominantly white with a few participants of color. In total, there were four cohorts (two in each year) of no more than 21 people in each. Each cohort came together for a total of six days of training over the course of 10 months. The training format designed by CDE included two, two-and-a-half-day immersive, in-person trainings and concluded with a 1-day capstone gathering. Between the in-person sessions, cohort members participated in webinars, engaged in work within their organization, and received individualized coaching from CDE. The first two-and-a-half-day training, entitled Building the Foundation, focused on building a common understanding of DEI concepts, creating a safer environment for deeply personal learning, developing awareness of the change process, and committing to shared goals for learning and action. The second two-and-a-half-day training, called Exploring Power, Privilege, and Tools for Change, focused on exploring individual filters and lenses, examining the role of power and privilege in participants’ lives and work, and developing tools to create a path toward a more diverse, equitable, and inclusive Willamette. Community-building was also integrated throughout the trainings.

The first year of cohort learning kicked off in 2017, and it was designated for WRI grantees who had received capacity funding or multiple years of project funding. A second learning year was added in 2019 in response to positive feedback from first-year participants and a strong expression of interest from others. At CDE’s recommendation, first priority for enrollment in the second learning year was given to additional staff from the organizations that participated in the first year to deepen the learning within those organizations. Some new organizations were also able to join the second year. In total, 80 people participated in a learning cohort. The WRI invited each organization to bring up to three people, ideally including a board member, to participate in a cohort. The WRI also provided small capacity grants to offset costs of staff time. Participation was entirely voluntary. Despite this, every core grantee sent someone to participate. This was a testament to their trust in each other and in the leadership of the WRI.

Impact
The CDE cohorts were a transformational experience for participants. Participants gained a deeper understanding of the history and ongoing effects of racism in the environmental movement. They developed a deeper recognition of the value of meaningfully engaging those who have been excluded in the collective work for the health of the river. They reflected personally and organizationally on the implications of their power and privilege. They began to examine their role in how to create change. They began to rethink their organizational policies and practices.

In addition to their personal and organizational DEI work, they also began to create a more inclusive culture in the broader restoration community. The collaboration and strong relationships they developed with their colleagues through the cohorts and in other aspects of their involvement in the WRI helped them to cultivate a supportive group of people they can turn to. They are now able to identify colleagues in the restoration field who are experiencing similar challenges with shifting their organizations to be more diverse, equitable, and inclusive. They have a community of support in working toward common DEI goals. This is helping to center DEI in the conversations and culture of restoration throughout the Willamette River Basin in a way that was not happening prior to WRI.

Key Features
There were several features contributing to the CDE cohorts’ success:

1. Developmental – CDE approached the work developmentally to enable people to explore their perspectives and determine how the work resonated with them personally. They met people where they were and gave them the tools to find answers on their own.
2. **Humanizing** – The CDE facilitators supported people to step away from their roles and their organizations and engage at a very personal level. They balanced patience, empathy, and kindness with speaking their truth. This created a safer space where people were less fearful of being wrong and could reveal their vulnerability and humanity.

3. **Abundance Focused** – CDE approached the work with a mentality of abundance and modeled that for cohort participants. They helped people see past the short-term challenges of adding to their already full workloads to view their work in DEI as beneficial and imperative.

4. **Immersive** – The design for the cohort reflected CDE’s deep experience and the WRI’s recognition that a significant shift to advance DEI was not short-term, superficial work. Despite concern that committing substantial time to the cohort might be difficult for leaders, the WRI followed CDE’s guidance to implement a long-term, iterative, and relational learning approach to achieve the substantial impact they intended.

5. **Relational** – Both CDE and the WRI recognized that strong, trusting relationships are essential to achieving the culture shift that is required to advance DEI. The relationships that had been developed both formally and informally through the WRI were strengthened in the cohort. This created a trusting environment where people could be vulnerable with each other. It allowed them to be open and honest as individuals about their identities, privilege, and biases, which in turn enabled them to confront them. It also took people out of the narrow focus of watershed health, and they were able to see each other, and themselves, in a new dimension.

---

**DEFINITION**

**Mainstream Organization; Dominant Culture Organization**

These terms refer interchangeably in this report to environmental conservation organizations that are historically white-led, employ a majority-white staff, use Western science as their primary knowledge system, and/or are built on a Eurocentric view of the environment and people’s relationship with it.

---

**Bridging the Gap**

**Purpose and Design**

The Bridging the Gap cohort developed as an opportunity for leaders of color and Indigenous leaders working on environmental education to come together, learn about each other’s work, and build a network of support. Initially, the WRI set out to support its grantees and mainstream conservation groups to build new partnerships and make their education programs more relevant to racially and ethnically diverse communities. While environmental education had not been a focus of WRI funding prior to adopting the DEI goal, engaging with leaders of color and Indigenous leaders made it clear that education and leadership development related to the environment were seen as essential to their communities. However, the WRI recognized that both the initiative and its grantees lacked an understanding of the current capacity for culturally relevant environmental education programming and knowledge in the basin, and they sought to understand strengths and gaps in the field. They realized their need to involve external expertise to understand how to best support culturally relevant environmental education in the Willamette.

The WRI partnered with Gladys Ruiz Consulting to assess the capacity for providing culturally relevant environmental education in community-based organizations and mainstream environmental...
organizations. The results of the assessment revealed that leaders of color and Indigenous leaders who were already doing culturally responsive education in their communities needed to build capacity to meaningfully engage with mainstream organizations. They needed space and support to first build community amongst themselves and heal from past engagement experiences. The assessment also revealed that white-led organizations lacked the trust, awareness, and skills to engage leaders of color and Indigenous leaders without potentially doing harm. This realization shaped how Bridging the Gap evolved to be a cohort focused on supporting leaders of color and Indigenous leaders while white leaders were building their DEI capacity through the CDE cohorts.

Although there were many groups that wanted to be a part of the conversation about culturally relevant environmental education, the WRI acknowledged that their initial idea for Bridging the Gap—to better equip white-led groups to do culturally relevant education and support partnership development between them and community-based organizations—was centering the agenda of white-led groups over community-based organizations. The WRI listened to advice from Gladys Ruiz that supporting white-led groups to partner on projects with community-based organizations before they had developed the skills and relationships to engage authentically would be likely to perpetuate patterns that are extractive of communities of color and Indigenous communities and have caused harm in the past. Instead, they engaged Gladys Ruiz to convene leaders of color and Indigenous leaders together to help address the need for capacity building that had been highlighted in the assessment. What emerged was a new version of Bridging the Gap, a cohort focused on creating a space for community building, learning, healing, and empowerment among leaders of color and Indigenous leaders.

The first Bridging the Gap cohort consisting of 10 Indigenous educators and educators of color met together in person and virtually over the course of 2019 (and is still active as of this publication). While this cohort marked a significant step in the WRI’s support for leaders of color and Indigenous leaders, this important work had only just begun when the initiative came to an end. Despite this recent start, the data reveal significant early outcomes in building community and capacity among these leaders.

Impact

Bridging the Gap created an environment where leaders of color and Indigenous leaders could share their experiences and learn about their common struggles with accessing resources, engaging in partnerships, and being recognized for the true value they bring to their fields. Building relationships was an important first step to learning. Seeing their commonality and discovering that the challenges they and their organizations face are not isolated experiences provided valuable perspectives. They were able to talk with each other about the shared struggles facing leaders of color and Indigenous leaders and examine together the issues stemming from entrenched systems of racism and oppression. Recognizing these challenges as systemic issues empowered leaders of colors and Indigenous leaders to see their own value, identify common struggles, and build a network of support to help each other to overcome the barriers that are erected by racist systems and structures. These were significant outcomes, particularly given that these benefits were realized after only one year and with a relatively small investment by the WRI as compared to the significant, long-term investment in building relationships that the WRI had made in mainstream, white-led organizations.

DEFINITION

Community-Based Organization

A public or private nonprofit organization that is representative of a community or a significant segment of a community and works to meet community needs, often providing educational or related services to individuals in the community (U.S. Department of Health and Human Services).
Key Features

There were several elements of Bridging the Gap that made it a uniquely impactful experience for participants:

1. **Co-Creation** – The Bridging the Gap cohort was designed by and for the leaders of color and indigenous leaders. The outcomes for the program were not pre-determined. Rather, the cohort members developed objectives together as they convened. This enabled the cohort to be flexible and adapt to meet the needs of participants throughout the process to ensure the activities and time spent together were meaningful and beneficial for all.

2. **Shared Experience** – The cohort provided an opportunity for leaders of color and Indigenous leaders to share their experiences with people who had a common understanding of what they were going through. Many leaders expressed that this was the first cohort they had participated in where people really “got it.” Recognizing their shared experiences revealed that their struggles were not typically a result of their own shortcomings but instead the product of systemic racism and oppression.

3. **Supportive** – Leaders of color and Indigenous leaders valued the supportive nature of the cohort. Having peers that could relate to their experiences and share wisdom and learning was invaluable. The supportive community created a feeling of solidarity among cohort members. It gave leaders of color and Indigenous leaders greater hope for the future and helped them recognize and assert their value. The cohort’s facilitator, Gladys Ruiz, also supported cohort members individually through coaching, helping them navigate and overcome individual and organizational challenges.

4. **Healing** – Bridging the Gap created an environment for people to reveal and process past experiences of leadership that were challenging or even traumatic. Many of these experiences came from partnering with mainstream groups. Having the time to process these experiences in a supportive community with a unique understanding of the situation helped participants heal from these experiences.

5. **Relational** – An important purpose of the cohort was to foster meaningful relationships among participants. The design of the cohort ensured that ample time was provided for people to get to know each other and learn about each other personally and professionally. Participants visited each other’s organizations to gain a deeper understanding of their colleagues’ work and to see other leaders of color and Indigenous leaders in action.
Critical Components of the WRI’s Approach

Many factors contributed to the significant impact both of these cohorts had in building communities of leaders poised to advance equity and inclusion throughout the Willamette River Basin and the restoration field. These factors include the following:

1. **Cohort-Based**
   The cohort model was a critical catalyst for change among the participants, both individually and collectively. It helped to strengthen individual relationships and nurture supportive networks. It also helped to strengthen habits of collaboration that were an essential component of the WRI’s strategy to build a strong foundation for organizations. In the end, this approach contributed to community-building among the cohort members. Using a cohort model engendered trust among cohort members. It created a safer environment for openness and reflection that is an essential precursor to establishing a more diverse, equitable, and inclusive Willamette.

2. **Empowering Facilitators**
   Skillful facilitation by consultants was a key feature that contributed to the success of these cohorts in furthering the WRI’s DEI goal. The WRI had a desired impact in mind, but did not dictate the process or outcomes. Instead, the WRI trusted the consultants’ experience and expertise to be true partners in this work.

3. **Flexibility**
   The WRI exercised as much flexibility as possible to best meet the needs of the participants. They adapted grant application and reporting processes to reduce barriers to participation. They encouraged participation but allowed organizations to determine if the cohort was the right fit and at right time for them.

4. **Listening and Learning**
   Rather than defining the outcomes for the cohorts, the WRI took the time to learn what people needed and wanted to gain from the cohorts. They allowed the facilitators to change course as needed to ensure the design and outcomes of the cohort were appropriate for the participants rather than to meet their predetermined objectives.

5. **Focus on Building Relationships**
   The WRI recognized that fostering relationships would be critical to creating a more equitable and inclusive Willamette River health movement. For the CDE cohorts, the WRI’s tactic to convene grantees since the beginning of the initiative resulted in longstanding and significant relationships. These relationships developed trust that laid the foundation for deep and meaningful learning through the cohort. This led to even greater trust and deeper collaboration among these groups in other aspects of their work as well. For the Bridging the Gap cohort, building relationships was of central importance to the participants, who were based in different areas of the Willamette Basin and knew little or nothing about each other before the cohort.
Lessons Learned
Through the cohorts, a number of important lessons can be learned.

More work is required for the river health movement to center the leadership and priorities of leaders of color, Indigenous leaders, and community-based organizations.

The WRI has been instrumental in bringing DEI learning and analysis to the mainstream watershed restoration field in the Willamette. However, there is still a lack of understanding among dominant culture organizations regarding how community-based organizations think about river health. Both cohorts discussed how the white, Western science-based field of river restoration treats the river as a separate entity, with humans as its restorers, whereas communities of color and Indigenous communities see the health of human communities and the river as intertwined: one cannot be achieved without the other. Until this difference in perspective is more broadly understood, it will be challenging to build equitable, reciprocal relationships between white-led groups and community-based organizations.

When done intentionally, flexible approaches with an eye for inclusion can meet the needs of everyone.

The WRI's flexible approach allowed people to work together to design learning experiences to meet participants' unique needs. The participants of Bridging the Gap and the CDE cohorts had ownership in the work because they were co-creators of it. The funders and facilitators were responsive to needs expressed by participants. They listened and learned. This co-creation leads to greater and more sustainable benefits for these organizations individually and collectively because the process and outcomes were fitting for the needs and capacity of the participants.

Ongoing support is needed to keep moving this work forward.

Participants are committed to sustaining and deepening the relationships and learning that occurred through these cohorts. They recognize that this work is a never-ending journey. They also recognize the value of the support they received through the cohorts. Ongoing support from experts who can guide them and peers facing a common struggle will be essential to help leaders better understand how to create change in their organizations and beyond.

Authentic relationship building matters.

The success of these cohorts illuminates the importance of funding authentic relationship building that is not bound by a specific deliverable. Relationship building is often thought of as a byproduct of working together to achieve goals. Many organizations still see it as optional. Yet conservation, restoration, and education work cannot be transformed without dedicating the time and creating an environment that enables people to build relationships across differences. Greater recognition of the importance of relationships for relationships’ sake will be needed to support future progress.

Overall, the WRI’s DEI strategy centered equity as a critical element of Willamette River restoration. It cast a vision for the Willamette that expanded who was involved in decision-making about the river and who benefitted from the river. It created more equitable and inclusive thinking and action in Willamette River restoration, education, advocacy, and community engagement that established a foundation for transformational impact for the river and communities touched by the river.