



Part One: Get Ready > 2. Build your team and map out your process.

DESIGNING YOUR PATHWAY TO ACTION WORKSHEET²²

Designing your Pathway to Action is a way to decide on which processes you'll need to facilitate, in which sequence and with which stakeholders in order to develop your race, equity and inclusion plan. This worksheet and pathway are particularly suited to a Race, Equity and Inclusion Strategy team that has the time and commitment to invest in a robust and thoughtful planning process. If you're earlier in the work or not sure how much time you'll need to invest, reviewing this worksheet will give you a detailed idea of the steps you could take and the overall flow of your planning process.

Once you've sketched out your Big Picture and finished your Stakeholder Analysis, you're ready to map out your process with the Race, Equity and Inclusion Strategy Team. As with the Stakeholder Analysis Worksheet, the examples here are primarily focused on your staff and board. It can also be used to design a process focused on your community impact work. More details about equity and community impact will be included in a forthcoming toolkit.

1. OUTCOMES: BEGIN WITH THE END IN MIND.

Refer to your Big Picture to ensure that your pathway will lead to the outcomes you are seeking. Then you'll want to identify some milestones that you'll achieve along the way to let you know you are making progress toward the goals of the process. What products will you create (e.g., a vision statement, data analysis, community narrative history, Race, Equity and Inclusion Action Plan, an ongoing communications process, etc.)?

Begin by putting your outcomes and milestones in a logical order. What will you need to achieve first, next and after that? Don't worry a lot about the specific timeline just yet.

2. MAP OUT PHASES OF THE PROCESS.

A sample sequence of phases and outcomes follows for a process focused on internal, organizational issues. A similar process could be followed for focusing on community level issues.

PHASES	TEAM BUILDING	KEY CONCEPTS	PROBLEM ANALYSIS	SHARED VISION	STRATEGIES & SOLUTIONS	ACTION PLANNING & CONTINUOUS IMPROVEMENT
TIMELINE						
Outcomes & Products	<ul style="list-style-type: none"> A multiracial team that's ready and willing to lead the process Trust and initial repair of past harms 	<ul style="list-style-type: none"> Shared understanding of race, equity and inclusion concepts Shared understanding of local history and related internal history in your UW 	<ul style="list-style-type: none"> Baseline data on org. assets and inequities within your UW (e.g., workforce equity, board/ vendor diversity, donor engagement) Analysis of key drivers and causes 	<ul style="list-style-type: none"> Shared vision of an equitable and inclusive organization 	<ul style="list-style-type: none"> Strategies to improve organizational capacity and produce more equitable outcomes 	<ul style="list-style-type: none"> Race, equity and inclusion Action Plan Processes to monitor implementation Processes to assess the impact of implementation and apply learnings to future action Improved outcomes

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3. DETERMINE THE TYPES OF ACTIVITIES YOU'LL INCLUDE IN YOUR PROCESS.

Refer to your Stakeholder Analysis for your ideas about stakeholder engagement strategies. Also, think about where various stakeholder groups already gather. Is there a regularly scheduled community council meeting to which you could bring some questions or ideas? An annual board-staff retreat? An annual donor event? An employee affinity group? How can these existing gatherings be leveraged to provide input and feedback throughout the process?

Given what you've learned from your stakeholders and your initial assessment, what kinds of activities will you need to facilitate in order to build shared understanding of key concepts and the case for action as well as a shared commitment to working on race, equity and inclusion and other elements of your plan. The chart below will help you determine the activities you'll need to undertake.

▶ DIALOGUE, HEALING, OR TEAM BUILDING

Purposes

- To learn about each other's personal backgrounds and experiences with race, equity and inclusion
- To unpack difficult situations and repair harms
- To build or repair trust

Key questions to select activities

- How well do your stakeholders (especially staff, board and community members who will be close to the race, equity and inclusion plan development process) know each other as individuals?
- How much do they trust and feel trusted by one another?
- To what extent do they carry hurt, anger, or disappointment that makes them unlikely or unwilling to engage fully in planning or learning activities?

If stakeholders don't know each other well, trust is low, or harms have gone unresolved, you'll most likely need some dialogue, healing, or team-building activities, both early and throughout the process.

▶ LEARNING

Purposes

- To build a common understanding of race, equity and inclusion concepts
- To build a common understanding of local history related to race, racism, equity and inclusion
- To build shared skills for working collaboratively and organizing for equity and inclusion

Key questions to select activities

- How familiar are your stakeholders with key concepts related to race, equity and inclusion?
- How familiar are they with the specific history of these issues in your community?
- How comfortable and skillful are they in discussing these topics and working together to address them?

Even the most sophisticated groups of stakeholders typically need some time to build shared understanding of key concepts. You'll want to incorporate some learning experiences for everyone and implement others that are targeted based on individual learning needs. If team building, healing, or dialogue are necessary, it's wise to wait until that work is underway before engaging in deep learning together.

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▶ PLANNING

Purposes

- To build a shared understanding of problems and issues
- A shared vision of a better future
- An action plan to pursue equity and inclusion
- Ways to monitor implementation and assess impact

The Seven Steps to Embrace Race Equity provides a useful framework for planning in specific areas of impact such as health, education and economic security.

Key questions to select activities

- What do your stakeholders understand about current inequities?
- How much do they share a common vision for the future?
- Who has knowledge or expertise in our community, at other United Ways, or from leaders in the fields of health, education and economic security that can inform our thinking?

Typically, planning activities should come after baseline learning activities, so your stakeholders have a common understanding of the issues you're trying to address. The planning activities provide an opportunity for your stakeholders to work together to build a plan of action. Most likely, you'll have a Race, Equity and Inclusion Strategy Team to make final decisions about what's in the plan, often in partnership with your senior leadership team. Seek input and feedback from many other stakeholders in your United Way and across your community to inform the plan using strategies identified in your stakeholder analysis (e.g., working groups, surveys, one-on-one's, town hall forums).

▶ RACIAL AFFINITY GROUPS

Purposes

- To support groups of individuals with similar racial identities who are grappling with how racism and white supremacy culture affect their lives and work

Key questions to select activities

- How familiar and comfortable are they with exploring their own racial identities? Engaging with others who share their racial identities? Engaging with others who do not share their racial identities?
- Have stakeholders of color who have more knowledge about race, equity and inclusion expressed wariness about participating in mixed-race learning processes where their experiences might become "learning objects" for their White peers?
- Have White stakeholders expressed concerns about possibly causing harm in mixed-race learning experiences that make them wary of fully participating?

Racial affinity groups or caucuses are a way for people to explore issues and provide support in same-race spaces that can be tailored to the learning needs of specific groups. While some stakeholders might think they're odd or even off-putting, racially homogenous affinity groups can be a powerful vehicle for learning and peer support. They can also create space to identify challenges and opportunities to improve organizational systems and culture. It's important for affinity spaces to be voluntary and confidential, and for group members to decide whether and how to bring forward ideas for problem solving or planning. Racial affinity groups can be important places for connection and healing as well as problem-solving.

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COACHING

Purposes

- To support individuals in developing deeper self-awareness and skill in practicing equity and inclusion

Key questions to select activities

- Are key White leaders or gatekeepers unaware of the impact they're having on Black, Indigenous and other people of color or the race, equity and inclusion planning process?
- Are individuals of any race expressing a desire for more specific guidance and development of their race, equity and inclusion practices?

One-on-one coaching can be particularly useful for people in leadership and management roles who may be struggling with how to understand their impact and how to practice more equitable leadership. It can be useful for people of any background to build on strengths, identify growth opportunities and transform stuck patterns in their work for race, equity and inclusion.

4. IDENTIFY IMPORTANT ACTIVITIES WITH WHICH YOU WILL WANT TO ALIGN YOUR PROCESS.

Examples include: strategic planning, annual program planning and budget development, annual public-facing events and fundraisers, internal training activities, etc.

5. DEVELOP THE TIMELINE.

After you've mapped out the activities, you're ready to go back and develop the timeline. Use important existing meetings (like an annual donor gathering) to help anchor phases of the process without forcing it to move too quickly. For instance, if your annual board/ staff retreat is coming soon, it might be a good opportunity to do some team building and learn about key concepts, but probably not a good opportunity to start vetting possible strategies. Building the timeline will be an iterative process to think about anchor events, consider dates by which you want to reach particular milestones. Think about a realistic amount of time necessary to carry out the stakeholder engagement strategies to achieve those milestones.

As you wrestle with the calendar, remember this African proverb: "If you want to go fast, go alone. If you want to go far, go together." It may take you longer to create your plan with a high level of stakeholder engagement than if a small team from your staff cooked up a plan on its own. But then you'd spend a long time "selling" the plan to everyone who needs to take part in implementing it. This way, various stakeholders contribute to the thinking and planning, building a constituency for the plan and increasing the odds that it will be implemented.

Notes



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PHASES	TEAM BUILDING	KEY CONCEPTS	PROBLEM ANALYSIS	SHARED VISION	STRATEGIES & SOLUTIONS	ACTION PLANNING & CONTINUOUS IMPROVEMENT
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ACTIVITIES BY TEAM OR STAKEHOLDER GROUP

Race, Equity and Inclusion (REI) Strategy Team	<ul style="list-style-type: none"> Orientation 	<ul style="list-style-type: none"> Readings Workshop Racial affinity groups 	<ul style="list-style-type: none"> Organizational assessment 	<ul style="list-style-type: none"> Working sessions 	<ul style="list-style-type: none"> Working sessions 	<ul style="list-style-type: none"> Working sessions
Working Groups: Workforce Equity Operations Board Development			<ul style="list-style-type: none"> Working sessions 	<ul style="list-style-type: none"> Working sessions 	<ul style="list-style-type: none"> Working sessions 	<ul style="list-style-type: none"> Working sessions
Staff Engagement		<ul style="list-style-type: none"> Workshop 	<ul style="list-style-type: none"> Survey Discuss at staff meetings 	<ul style="list-style-type: none"> All-staff retreat (or joint staff/board retreat) 	<ul style="list-style-type: none"> Get feedback on REI Team and Working Group ideas in staff meetings 	<ul style="list-style-type: none"> Get feedback on REI Team and Working Group ideas in staff meetings
Board Engagement		<ul style="list-style-type: none"> Workshop 	<ul style="list-style-type: none"> Survey Discuss at staff meetings 	<ul style="list-style-type: none"> All-staff retreat (or joint staff/board retreat) 	<ul style="list-style-type: none"> Get feedback on REI Team and Working Group ideas in staff meetings 	<ul style="list-style-type: none"> Get feedback on REI Team and Working Group ideas in staff meetings

ONGOING ACTIVITIES

Racial Affinity Groups	<ul style="list-style-type: none"> Monthly or bi-monthly affinity group/peer support and learning sessions, organized by staff
Coaching	<ul style="list-style-type: none"> Peer coaching pairs (begin in workshops, meet monthly after workshops)
Staff Brown-Bag Lunches	<ul style="list-style-type: none"> Quarterly, organized by staff

ACTIVITIES WITH WHICH TO ALIGN

<p>Identify and map onto the timeline strategic planning sessions, annual meeting, board meetings, annual celebrations or events, etc.</p>						
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TIMELINE	Months 1-3	Months 3-6	Months 7-10	Months 11-14	Months 15-18	Months 19-22
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Process Map Example

Use this blank worksheet to map out your Pathway to Action.

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TIMELINE						
Outcomes & Products						
ACTIVITIES BY TEAM OR STAKEHOLDER GROUP						
Race, Equity and Inclusion (REI) Strategy Team						
Working Groups						
Other Stakeholder Engagement						
Staff Engagement						
Board Engagement						

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ONGOING ACTIVITIES						
Racial Affinity Groups						
Coaching						
Staff Brown-Bag Lunches						

You could also create a visual summary of the information like the examples below:

•• Draft Documents
 ● Staff Teams
 ■ Core Planning Team (small=call), (big=face to face)
 ● Stakeholder Convening

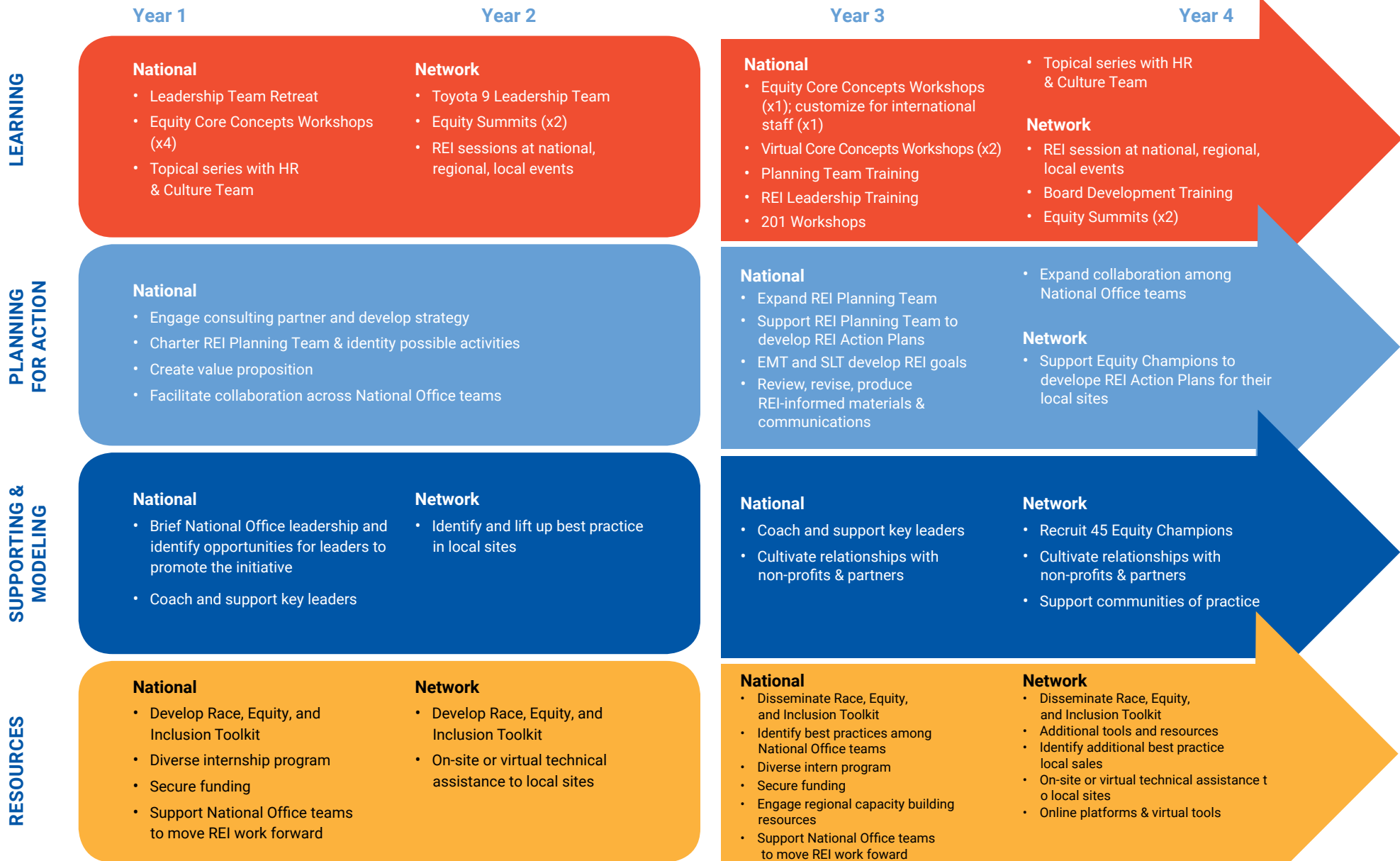
DIABETES PREVENTION NETWORK DEVELOPMENT		
Initial Meeting of Core Planning Team Jan-April	Convene Diabetes Prevention Network April-June	Produce Diabetes Prevention Action Plan July-September
	Planning Activities and Stakeholder Involvement 	
<p>Develop draft framework of Diabetes Prevention Action Plan as detailed by CDC's 4 pillars. Define role of core planning team in the development of the Diabetes Prevention Action Plan and Network.</p> <p>Increased engagement with key diabetes prevention community stakeholders</p>	<p>Feedback from the Diabetes Prevention Network Further understand existing work and strategies by local stakeholder. Identify environmental and programmatic gaps to inform future work and resources.</p> <p>Increase clinical-community linkages in focus neighborhoods; Increase awareness about prediabetes and diabetes prevention programs; Increase the number of organizations hosting and providing diabetes prevention programs</p>	<p>Document to inform diabetes prevention work through next fiscal year</p> <p>Increase number of organizations that participate in diabetes prevention programming Increase in resources committed to diabetes prevention programming awareness.</p>



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RACE, EQUITY AND INCLUSION PROCESS MAP (Process Map Example)



A variety of online tools (for example: Canva, and LucidChart) can support you in creating your process map graphics.

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