



Part One: Get Ready > 1. Ground the case for change in your mission and values.

MAKING THE CASE FOR CHANGE WORKSHEET

Building on the UWW Case for Change, communicate with your stakeholders about why race, equity and inclusion are important to your work, and how addressing these issues will make you better able to achieve your mission. Work with your champions to adopt the UWW case or create your own local Case for Change. It will be a living document you can adjust as you engage with more and more stakeholders within your community and deepen your analysis of your current reality.

How to make the case for change

Describe:

1. The Big Picture
2. The implications of doing nothing/not changing the current reality/business as usual
3. Benefits of achieving the goals of the process
4. Describe why we are the people to do this and what makes us able to succeed

Why it's important:

- To build commitment
- To clarify why people are working together
- To uncover expectations and hopes
- To align those responsible for the change with each other and with key champions
- To outline goals and milestones

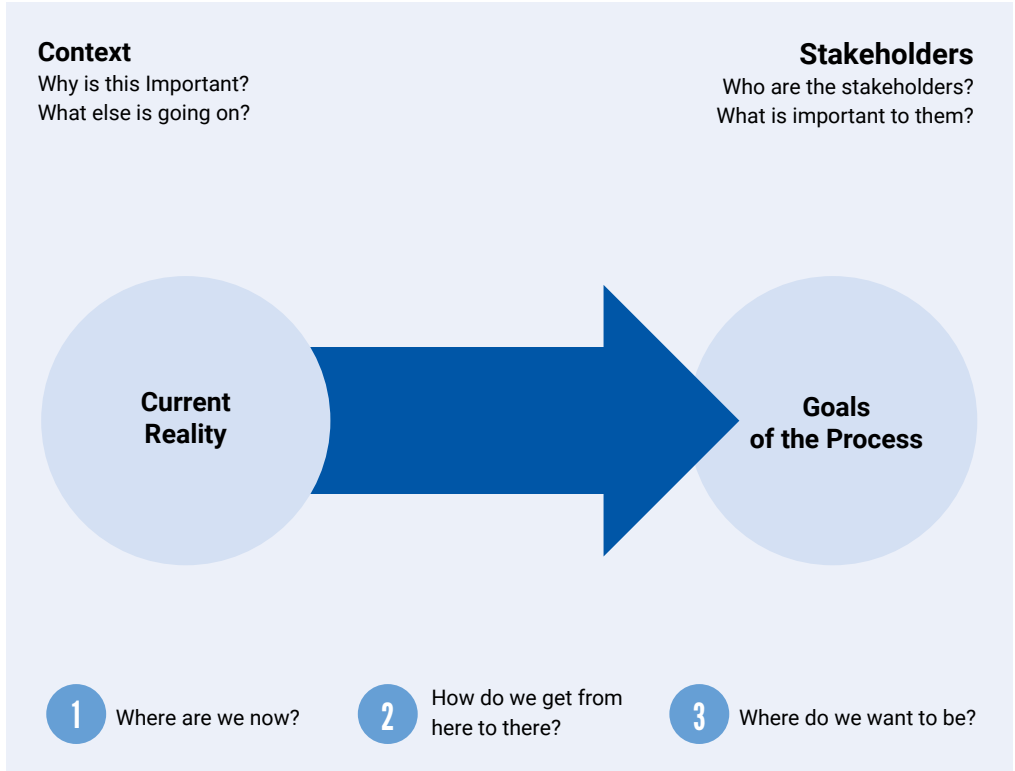
QUESTIONS TO EXPLORE

1. DESCRIBE THE BIG PICTURE.

Context:

- What is the history of race, Equity and Inclusion in your community? What are our assumptions and understandings about why inequities exist in our community? What are some factors (e.g., racialized structures, policies, practices, attitudes, resource distribution) that contribute to current inequities?
- Why is focusing on race, Equity and Inclusion important to our community and our United Way? How is this work related to our ongoing diversity and inclusion efforts?
- What else is going on in the community and within our United Way that could support or hinder our efforts? What power relationships (e.g., with funders, public officials, board members) could affect us?

Notes





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MAKING THE CASE FOR CHANGE WORKSHEET, CONT.

1. DESCRIBE THE BIG PICTURE, CONT.

Stakeholders:

- **Who:** stakeholders include:
 - People who are most adversely affected by dynamics related to race, equity and inclusion
 - ▷ People who are going to be affected by our efforts
 - ▷ People who will implement these efforts
 - ▷ People who could block these efforts
 - ▷ People who have veto power over the decisions we will make
 - ▷ People with whom we can partner
 - ▷ People with resources that can support learning, planning, or implementation
 - **What does a “win” (a good outcome of our race, equity and inclusion efforts) look like from their point of view?** At this stage, you’re doing your best thinking about what’s on the minds of your stakeholders. Later in the process, you’ll connect with stakeholders to hear their thinking.

(Note: Later in the process, you’ll use the “Stakeholder Analysis Worksheet” to determine how to engage your stakeholders in the planning process.)

Notes



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Current Reality:

- What's going on now in our community related to race, equity and inclusion?
- Who's experiencing inequitable outcomes in our community in health, education, income or other measures of well-being?
- What needs are not being met? Whose potential is not being fully developed?
- What are contributing factors?
- What are strengths and assets in the community and in your United Way?

Notes

Goals of the Process:

- In broad terms, how do you think about success related to race, equity and inclusion? What results are you hoping to achieve? What kinds of processes will you want to develop or refine to achieve those results? What relationships do you want to cultivate, deepen, or transform?

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2. CLARIFY THE IMPLICATIONS OF DOING NOTHING/NOT CHANGING THE CURRENT REALITY/BUSINESS AS USUAL.

- What's the cost of continuing to do business as usual? What are the likely, anticipated, or feared consequences of not deepening our focus on race, equity and inclusion? Who will bear the burden? What opportunities will be lost?

Notes

3. DESCRIBE THE SPECIFIC BENEFITS OF ACHIEVING THE GOALS OF THE PROCESS.

- How is focusing on race, equity and inclusion central to our mission? How will it enable us to achieve our vision? How will it enable us to implement our strategies and programming more effectively and better serve our community?
- What specific advantages or gains are there for various stakeholders, our local UWW and UWW as a whole to deepen our focus on race, equity and inclusion?
- In other words, what's our vision of success for race, equity and inclusion in our community and our United Way?

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4. DESCRIBE WHY WE ARE THE PEOPLE TO DO THIS AND WHAT WILL SUPPORT OUR SUCCESS.

- What strengths, resources, skills, knowledge and relationships will support us in moving this work forward?
- What relationships and partnerships can support us in this work?

Notes

