



Part One: Get Ready > 4. Prepare yourself to facilitate.

RULES OF THE ROAD FOR CHANGE AGENTS²⁹

You're an agent of change in your United Way and beyond. These "rules" will help you make the most of opportunities to move your race, equity and inclusion work forward, no matter the context.

1. STAY ALIVE, LITERALLY AND FIGURATIVELY.

Take care of yourself. Stay in touch with your purpose. Love yourself. Don't make this your last cause. Be clear-eyed about the risks you're taking and strategic about which risks to take.

2. START WHERE THE SYSTEM IS.

Understand where people are individually and where your organizational capacity is most and least able to support your work. Meet people and the organization where they are, with careful plans to support their journey of learning and practice.

3. NEVER WORK UPHILL.

This isn't about avoiding hard things. It's about building from strengths and not making the word harder than it already is.

- Don't build hills as you go. Proceed in ways that reduce rather than intensify resistance.
- Work in the most promising areas. Look for early wins that can demonstrate the value of the work to others.
- Build capacity. Don't go it alone. Build your team!
- Don't over-organize.
- Be bold. While it's important to be careful, it's also sometimes important to take initiative and make decisions that advance your work rather than wait endlessly for authorization.

4. INNOVATION REQUIRES A GOOD IDEA, INITIATIVE, AND A FEW FRIENDS.

Start by building capacity with even a small group of people who are aligned and invested. You don't need 100% agreement to begin your work.

5. LOAD EXPERIMENTS FOR SUCCESS.

Again, this isn't advice against being bold or taking risks. It's about trying things to learn and improve. Build an umbrella over your experiments and support the ownership of team members.

6. LIGHT MANY FIRES.

Changing a system requires changing many things in different arenas. Rather than putting all of your focus in one area or one leverage point, catalyze change in many interdependent parts of your system.

7. KEEP AN OPTIMISTIC BIAS.

Even in the midst of challenging work, keep your eyes open for constructive forces that can support the change. While you must also pay attention to potentially destructive forces, don't let them overtake all of your attention.

8. CAPTURE THE MOMENT.

While you're planning carefully, also be ready to capitalize on what's emerging in your work. Be willing to tap into your heart and intuition, not just your analytical or problem-solving skills, to help you recognize the moment and make the most of it to build momentum.

²⁹ This is an adaptation of an excerpt from Herbert A. Shephard, "Rules of Thumb for Change Agents," OD Practitioner, December 1984, which appeared by permission in Collaborative Social Change: Designing for Impact in a Networked World, Interaction Institute for Social Change. Reprinted with permission.