



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

SAMPLE MEETING TOPICS TO MAP OUT YOUR PROCESS

The size and complexity of your United Way may determine the size and complexity of the tasks for your Race, Equity and Inclusion Strategy Team. This tool offers an outline of topics the team will cover, spaced out over several meetings. You may find that you need more time than is suggested below for some topics and less time for others. Use this as a rough guide to jumpstart your planning process.

LAUNCH SESSION (1.5–2 DAYS IN PERSON)

Desired outcomes

Shared understanding of:

- Rationale for the initiative
- Working definitions of key concepts (e.g., equity, diversity, inclusion, race, racism, anti-Blackness, intersectionality, White supremacy culture)
- Charter role and tasks of the Race, Equity and Inclusion Strategy Team and key process design concepts to assist in accomplishing those tasks
- Team members' backgrounds and experience (both personal and work-related) in race, equity and inclusion

so that we can generate the following:

- Refined big picture (context, stakeholders, current situation, goals of the planning process) (See Making the Case for Change tool earlier in this workbook)
- An initial stakeholder analysis (who are the stakeholders and what are they thinking/ what do they know about these issues) (See Making the Case for Change tool earlier in this workbook)
- List of communications needs and challenges, including ideas for a streamlined name for this process, mission statement and necessary documents.
- List of questions or issues that need to be addressed during this process, including elements of the learning agenda
- List of additional concepts for the working definitions (e.g., empowerment, anti-racism, ally/accomplice, assimilation, acculturation, microaggressions)

and build agreement on:

- Norms for working together as a team and expectations about our specific roles
- Agreement on next steps, including how to check in with stakeholders

Homework/Next Steps

- List of ongoing meetings and processes we could leverage (e.g., staff meetings, network communications, surveys)
- Stakeholder analysis for additional stakeholder groups (each individual team member might commit to working on the analysis for a specific stakeholder group)
- Next draft of "big picture"
- Upgrade/update working definitions as needed



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SAMPLE MEETING TOPICS TO MAP OUT YOUR PROCESS, CONT.

WORKING SESSION 1 (3-4 HOURS IN PERSON OR VIRTUAL MEETINGS)

Desired outcomes

- Shared understanding of remaining stakeholder analysis, including initial ideas about involvement strategies
- Agreement on any additional data collection or data review needed to more fully flesh out the current reality
- List of key activities to leverage and implications for the planning and learning timeline

Likely Homework

- More work on specific activities to engage stakeholders
- More work on the working definitions (as needed)
- Additional data collection or review to more fully flesh out the current reality

WORKING SESSION 2

Desired outcomes

- Refined big picture based on any additional data collection or review
- Initial agreement on timeline and phases of process and milestones to achieve in each phase
- Initial agreement on activities (e.g., planning, communications, alignment with other organizational processes)

Likely Homework

- More work on specific activities to engage stakeholders



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SAMPLE MEETING TOPICS TO MAP OUT YOUR PROCESS, CONT.

WORKING SESSION 3

Desired outcomes

- Refined timeline, phases, agreements and activities based on stakeholder feedback, leading to initial draft of process map that includes:
 - ▷ Core planning, learning and dialogue questions and topics
 - ▷ Sequence of phases, including milestones for each
 - ▷ Timeline
 - ▷ Clear roles and decision-making processes
 - ▷ Documentation processes
 - ▷ Opportunities for meaningful stakeholder engagement
- Agreement on who must be consulted before design can be considered complete (“sign-off stakeholders”)

Likely Homework

- More work on specific activities to engage stakeholders
- Check in with “short list” of stakeholders who will need to see/respond to the process map and Race, Equity and Inclusion Strategy Team role and composition before it can be considered finalized

Notes



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SAMPLE MEETING TOPICS TO MAP OUT YOUR PROCESS, CONT.

WORKING SESSION 4

Desired outcomes

- Refined timeline, phases, agreements and activities based on stakeholder feedback, leading to draft process map that includes:
 - ▷ Core planning, learning and dialogue questions and topics
 - ▷ Sequence of phases and milestones for each phase
 - ▷ Timeline
 - ▷ Clear roles and decision-making processes
 - ▷ Documentation processes
 - ▷ Opportunities for meaningful stakeholder engagement
- Initial list of Phase 3 resource needs and potential sources

Likely Homework

- Initial Phase 3 budget and resource development/fundraising plan

WORKING SESSION 5

Desired outcomes

- Final agreement on process map
- Agreement on immediate next steps to begin launching process

Likely Homework

- Distribute process description and process map
- Implement resource development/fundraising plan