



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

## SAMPLE RACE, EQUITY AND INCLUSION STRATEGY TEAM CHARTER

A team charter describes the purpose of a team, outlines guiding principles and describes the team's role.

### 1. Purpose of the Race, Equity and Inclusion Strategy Team

To design and steward a collaborative planning process that produces a race, equity and inclusion plan and support its implementation.

### 2. Guiding Principles<sup>20</sup>

#### Stakeholder inclusion

Community input and participation drives the development of the initiative. We include staff, board members, partners, program participants and community members from the private and nonprofit sectors in the decision making, planning and implementation processes.

#### Transparency

We encourage open dialogue and exchange of ideas throughout the development, planning and implementation processes. As a community, we ask questions, find answers and develop solid strategies together. The planning process and decision-making are clear and made known every step along the way.

#### Collaboration

By involving people from a variety of backgrounds, we ensure that community members as well as staff are informing and benefiting from the most well-rounded, developed strategy possible. We build sustainable partnerships between our organization and the community that maximize the benefits of our work in the local area.

#### Research and Data

Our collective understanding of the issues we face—as well as the approaches we develop and the goals we set to accomplish them—will be based on information that's relevant and usable. We disaggregate our data to uncover inequities. Our programs and strategies are evidence-based and have records of success that can be replicated.

#### Intentionality

We're purposefully building a planning process that holds to the principles above. We work hard to ensure our actions match our words. When we make mistakes, we take responsibility, learn from them and make every effort to do better going forward.

### 3. Guidelines for Team Composition

The team should include individuals who reflect:

- Diverse identities (particularly in race/ethnicity, gender and generation)
- Each layer/level in the organizational hierarchy (e.g., line staff, middle managers, senior leaders)
- Each site/location (or collection of sites/locations)
- Different roles (e.g., programmatic, technical, administrative/infrastructure)
- A variety of lengths of tenure with the organization
- Different places on their learning curve around equity, diversity and inclusion

### 4. Key Team Roles and Tasks

Throughout the process, the Race, Equity and Inclusion Strategy Team will play multiple roles.

#### Process leadership

- Serve as ambassador for the project within the organization to communicate updates, gather input and identify potential opportunities and challenges
- Provide accurate assessments of stakeholder interests and concerns; keep “finger on the pulse”
- Generate and sustain enthusiasm, interest and engagement in the process among stakeholders outside of the Race, Equity and Inclusion Strategy Team

#### Process design

Focus during design phase

- Timeframe and length of process
- Phases and milestones
- Track activity and link to other organizational processes (e.g., all-staff retreat, regular meetings of various teams and groups)
- Stakeholder analysis and engagement strategies: who will be involved, when and how they will do so and who will be in each ring of involvement
- Decision-making process and guidelines

Format and scope of the final product(s)

- Focus during planning and learning phase:
- Design agendas for specific meetings, workshops, planning sessions, etc.
- Ensure that events are implemented as planned
- Make mid-course corrections to activities based on real-time learning and feedback
- Plan development and decision making
- Gather and synthesize stakeholder input
- Support team to develop their sections of the Race, Equity and Inclusion Plan
- Develop a consolidated Race, Equity and Inclusion Plan, engaging relevant decision makers throughout the process

#### Network development

- Inventory of other related planning processes
- How to coordinate and build on other efforts

#### Data management and communications

- Record, synthesize and share information; prepare documents for decision making, track decisions and update documents as needed during the process
- Use media to share information
- Ensure that the process and progress remain visible



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## SAMPLE RACE, EQUITY AND INCLUSION STRATEGY TEAM CHARTER, CONT.

### Project management and resource development (could be delegated to project manager)

- Manage and guide process
- Ensure adequate staff support
- Coordinate with consulting support and other resources (process and technical)
- Reserve meeting space and supervise logistics
- Budget for proposed process
- Plan for securing funds, space, volunteers and other resources

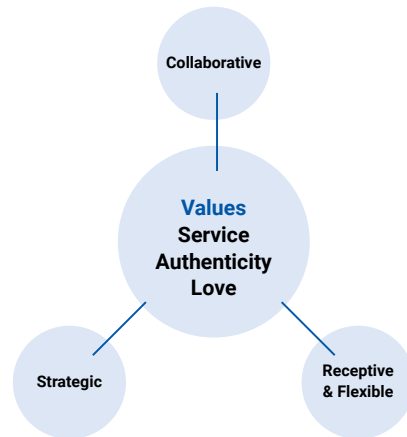
### 5. Individual Roles and Responsibilities

- Be ambassadors and advocates for the planning process and strategic change within and beyond your organization, including possibly acting as a spokesperson for the planning effort in different settings
- Help build communication between stakeholder groups and the planning process:
  - ▷ Stay connected to the stakeholder groups you represent
  - ▷ Reflect their thinking and points of view on the Race, Equity and Inclusion Strategy Team and in the planning process
  - ▷ Communicate progress to stakeholder groups
- Collaborate in plan development and analyze input from stakeholders, using their feedback to make final decisions about what's included

- Help reach out to and recruit people for work teams and community gatherings
- Participate on work teams, where appropriate
- Attend Race, Equity and Inclusion Strategy Team meetings and community gatherings related to the process

### 6. Attributes of Effective Race, Equity and Inclusion Strategy Team Members

Effective Race, Equity and Inclusion Strategy Teams are comprised of members willing to focus on the “how” of a collaborative process, knowing they’re creating space for themselves and others to determine the “what” that will be developed along the way. Individual members reflect the profile of a collaborative change agent, demonstrating a collaborative attitude, strategic thinking and receptive/flexible behaviors to live out the core values of service, authenticity and love.



### Attributes

#### Collaborative

- Creates opportunities for people to work together
- Shares the power of decision making.
- Promotes the value of win-win solutions.
- Engages diverse participants, acknowledging their value to the group, and brings their experience, strengths, and competencies into the room.

#### Strategic

- Reminds others of the "big picture" and the overarching goal.
- Understands systematic racism and other -isms.
- Keeps attention focused on high-leverage issues an activities.
- Provides perspective at critical moments.

#### Receptive & Flexible

- Welcomes, encourages, seeks out, and explores different ideas and opinions.
- Accepts others' ideas, perceptions, and feedback in a non-defensive way.
- Adjusts plans to meet changing needs.
- Models collaborative behaviors.

### Values

#### Service

- Works for or assists.
- Focuses on the interests and needs of others.
- Builds relationships based on equality, humility, and mutuality.

#### Authenticity

- Brings his or her full self into the room; expresses passion for the issues.
- Tells the truth; admits uncertainty.
- Seeks deeper understanding of others' cultural backgrounds and identities as well as his or her own.

#### Love

- Holds others in the full humanity.
- Communicates deep acceptance of others'.
- Taps his or her own inner core.