

# Get Ready Practice Equity Daily



Living United:

A Guide for Becoming a More Equitable Organization









## United Way Colleagues,

Our mission is to empower individuals to achieve their full potential to lead a better life. We envision sustainable, inclusive and resilient communities that mobilize donors, advocates, volunteers and partners to join us on fighting issues impacting individuals in our communities.

We will win this fight by being more intentional and providing experiences and opportunities for individuals to scale their impact, act and support in ways that are engaging, meaningful and transformative.

As we work to execute our strategy, we know that individuals and families in our communities will face significant barriers to achieving their potential. On every measure of well-being, outcomes are predictable based on race and ethnicity. Black, Latinx, Indigenous, and some Asian individuals and families in our communities are among the most vulnerable to poor economic, educational and health outcomes. While it is common to believe these differences are based on individual effort, attitude or skills, the truth is barriers in our society—which become public policies and private practices over time—have disparate impacts.

To achieve our vision of all individuals and families reaching their human potential, we must understand and address the factors that impede progress based on race or ethnicity, to create more inclusive organizations and communities, and pursue more equitable outcomes.

Achieving United Way's mission means being an equity leader and striving for outcomes that reflect a more inclusive global society. As we articulate what the Modern United Way looks like, we must:

- · Have a dual focus on operationalizing equity internally and in our community work;
- Include and prioritize the voices of those most affected;
- · Ensure that decision making is transparent and involves staff and communities who are most affected:

- · Be informed by history and data;
- · Be creative and non-linear;
- · Provide continuous training to refine knowledge, commitment, skills, practice and reflection:
- · Acknowledge that successful outcomes will manifest in different forms, including better internal policies, stronger community results, and improved relationships and processes:
- · Involve CEOs, board leadership and members, and our entire staff; and;
- · Be about action as well as talk:

We are proud of United Ways, who are trailblazers in this work and remind us that we can always make a difference and be more equitable in engaging with community, diversifying our boards and staff, and improving vendor procurement. We highlight their work through the many case studies included in this document.

United Way Worldwide has intentionally focused inward as well as outward, and we encourage you to begin your diversity and inclusion journey in making impact equitable. As our network embraces an equity lens and understands its impact on our national and global work, we are here to support you in your efforts to lead in new ways.

Yours in equity and inclusion,

Brian Gallagher

President and Chief Executive Officer

Brian a. Abeloge

United Way Worldwide

U.S. President

United Way Worldwide

Suzanne McGruick





# **UNITED WAY EQUITY DEFINITION**

Equity is the intentional inclusion of everyone in society. Equity is achieved when systemic, institutional, and historical barriers based on race, gender, sexual orientation, and other identities are dismantled and no longer predict socioeconomic, education and health outcomes.

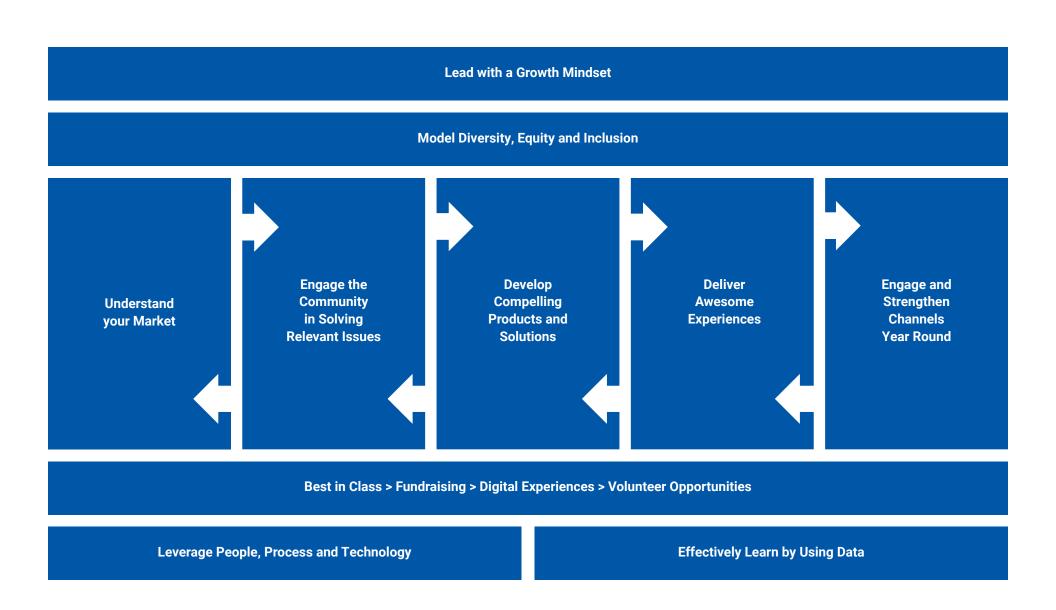
# **UNITED WAY VISION FOR EQUITY**

We recognize structural racism and other forms of oppression have contributed to persistent disparities which United Way seeks to dismantle. Our United Way network strives to engage community members, especially those whose voices have traditionally been marginalized. We work with residents and public and private partners to co-create solutions that ensure everyone has the resources, supports, opportunities and networks they need to thrive. We commit to leveraging all of our assets (convening, strategic investments, awareness building, advocacy) to create more equitable communities.





# **BLUEPRINT OF A MODERN UNITED WAY**







# MODEL DIVERSITY, EQUITY AND INCLUSION

### **Creating Equitable UW Organizations**

Goal: Help United Ways become more diverse, inclusive, and equitable organizations so that they are more credible addressing these same issues in the community.

Key Products: Equity Toolkit, Annual Summit, Learning & Tools



### **Creating More Equitable Communities**

Goal: Leverage expertise within and outside United Way to provide the strategies, best practice examples, and success measures to help United Ways create more equitable communities and close disparities wherever they exist.

**Key Products:** Equity Framework, Integrating Equity into Impact Approach & Common Measures (GRF), Resources & Tools



### **Strengthening the Capacity of Local Leaders**

**Goal:** Deepen Board member understanding of community issues and data. Increase leadership capacity to advance equitable community change.

Key Product: EY Board Development Learning Series



**Diversity, Equity and Inclusion Team** 

**Talent & Development** 

**Impact Team** 







# TOOLKIT OVERVIEW

This toolkit is designed to support you in being bold and effective on your race, equity and inclusion journey. It focuses on what you might consider "getting your own house in order"-building our understanding of the core issues; building our organizational capacity to focus on race, equity and inclusion; and creating supportive and thriving work places for our staff so that we can mirror an inclusive culture as we go out into the community.

Whether your United Way is small or large, with few or many staff, you'll find quidelines, tools and stories here to support you on your journey.

### There are two sections:



### PRACTICE GUIDE

This section contains guidance about where and how to begin, or how to design your next steps if you have been on the journey for a while. Although this section is sequentially organized, feel free to move through it in a way that addresses the guestions and issues you are working with at the moment.



### **WORKBOOK**

This section contains tools, templates, worksheets and resources to support the actions in this practice guide. Refer to the workbook as you need tools or guidance to take specific steps.

### Each section is divided into two parts:

# PART ONE

### Get Ready

You'll find guidance here to carefully think through and prepare the design of your race, equity and inclusion efforts. The organizing framework for this section was provided by the Interaction Institute for Social Change.

- 1. Ground the Case for Change in Your Mission and Values.
- 2. Build Your Team and Map Out Your Process.
- 3. Bring Champions Together and Launch Your Process.
- 4. Prepare Yourself.
- 5. Build Shared Language and Analysis.

# PART TWO

- 1. Build Equity-Minded Culture, Structures and Systems.
- 2. Nurture a Diverse, Equity-Minded Workforce.
- 3. Nurture a Diverse, Equity-Minded Board.
- 4. Tell Stories that are Centered on People and Systems.
- 5. Design Programs and Policies that are Targeted and Universal.

Please dive in. Get ready and practice equity daily! The UWW Diversity, Equity and Inclusion and Community Impact Teams are also available to support your thinking and practice. If you're reading this toolkit in hardcopy, you can request a PDF version from the UWW Diversity, Equity and Inclusion Team. That will enable you to use the many links that are embedded throughout the document.





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# PRACTICE GUIDE: INTRODUCTION



Focusing explicitly on race, equity and inclusion is a marathon, not a sprint. You'll want to set up for success and plan to build support as you go. In this stage, think collaboration and ask yourself, "How can I organize these initial steps in ways that build engagement, enthusiasm, and support? How can I help people work together and understand the importance of these issues to their everyday work?"

It's not up to you as a leader to have all the answers. It's up to you to create the context where people can work together so that the answers that emerge are strategic and supported by a broad set of stakeholders. If they have fun and see success along the way, you are more likely to engage more people. In this toolkit, we emphasize the internal work of United Way organizations. Even so, the steps described in this section could also support your exploration of community-based, impact-focused work.

In this part of the toolkit, you'll find five sections to help you get started:

### 1. GROUND THE CASE **FOR CHANGE IN YOUR MISSION AND VALUES.**

Begin by articulating why you think it's important to focus explicitly on race, equity and inclusion, and how this focus will enable you to carry out your mission more effectively.

You'll need to do your homework about the history of race, equity and inclusion within your United Way and in your community. Who's been excluded? Who's bearing the burden of inequitable resources and life outcomes? Continue to refine your case as you bring more stakeholders into the process. Communicating with a sense of urgency is a crucial first step to understanding the "why" and building the business case, a shared vision and commitment to change.

### 2. BUILD YOUR TEAM AND MAP OUT YOUR PROCESS.

You're embarking on a change and it's something you can't facilitate on your own.

You'll need a Race, Equity and Inclusion Strategy Team to help you assess where your United Way is on its race, equity and inclusion journey; articulate what you hope to accomplish; design the process; and plan the changes and activities necessary to get you there.

You may also need support from capacity builders (facilitators, trainers, or consultants) to design and implement parts of your process. This early stage is all about assessing your United Way's readiness to explicitly focus on race, equity and inclusion. The collaborative process will include a combination of learning, planning, coaching and other activities that lead to a plan. This won't be your only assessment, just an important first step.

### 3. BRING CHAMPIONS **TOGETHER AND LAUNCH** YOUR PROCESS.

While you're planning a collaborative process with roles for people throughout your United Way and community, there's an important part for organizational and community leaders to play. This is the moment when you'll connect with key leaders (mostly internal to your UW although sometimes external support can be a powerful motivator) who can champion the effort by speaking clearly and explicitly about the need to focus on race, equity and inclusion; identifying resources (including staff time and "real estate" on critical meeting agendas); and removing obstacles. With their support, the next step is to launch the planning and learning process you and your team have designed.

### 4. PREPARE YOURSELF TO FACILITATE.

As a leader, whether or not you invite a facilitator or consultant to support your process, you'll be engaging individuals and groups in the work of focusing on race, equity and inclusion. In other words, you'll be facilitating a lot of conversations. "Facilitating" simply means making it easy for people to think, learn, agree and act together. That can happen in large, highly structured meetings, informal gatherings and one-on-one conversations.

As you reach out to others, you'll want to make sure that you're also "doing your own work." That means deepening your self-awareness about how race, equity and inclusion matter in your life and work, and grounding yourself in your deepest and most powerful values and practices. It also means showing up with openness and getting ready to facilitate dialogue and planning with others. No doubt you're already on this lifelong journey. We offer some ideas to help you continue to grow.

### **5. BUILD SHARED LANGUAGE AND** ANALYSIS.

As you work your way through the steps discussed above, deepen your familiarity with core concepts related to race, equity and inclusion, and build a common way of thinking about these concepts with your Race, Equity and Inclusion Strategy Team and champions.



# 1. GROUND THE CASE FOR CHANGE IN YOUR MISSION AND VALUES

Begin by articulating why you think it's important to focus explicitly on race, equity and inclusion, and how this focus will enable you to carry out your mission more effectively. You'll need to do your homework about the history of race, equity and inclusion within your United Way and in your community. Who's been excluded? Who's bearing the burden of inequitable resources and life outcomes? Continue to refine your case as you bring more stakeholders into the process. Communicating with a sense of urgency is a crucial first step to understanding the "why" and building the business case, a shared vision, and commitment to change.

You're embarking on a change process and people typically want to know why the change matters before they commit to making efforts to implement it. No matter the size of your UW, help your staff, board, volunteers, partners, and community members understand why you're focusing on race, equity and inclusion, and how this focus will improve your ability to achieve your mission and LIVE UNITED. As a leader, begin by expressing your own ideas, then gather input from others. As you move through the process, explore and refine the shared case for change with additional stakeholders.

Here are three core ideas to help you get started:



### CLARIFY HOW FOCUSING ON RACE, EQUITY AND INCLUSION ENABLES YOU TO ACHIEVE YOUR MISSION, VISION, AND VALUES.

Living United means being courageous and eliminating the disparities that keep certain segments of our community from achieving opportunities for a better life. It means mobilizing the caring power of community to lift those most in need and create communities where no one experiences barriers to living healthy, thriving lives. It also means internally modeling what an equitable and caring community looks like. Explain how the absence of this focus will harm (or has harmed) your community and your organization, how taking this approach will benefit everyone, and how even traditional social service providers have a role to play in eliminating the barriers that create a need for their services.



### EXPLORE HOW FOCUSING ON RACE, EQUITY AND INCLUSION WILL STRENGTHEN THE FABRIC OF YOUR COMMUNITY.

When everyone prospers, the talents of each community member are developed and their potential to contribute to a thriving community and economy is expanded. Given the economic, ecological, and social challenges we face in our communities, we need everyone living their best lives and making their best contributions—including your staff. We know that a more engaged staff stays longer, remains more committed, and can more authentically engage with the community.



### EXPLAIN HOW FOCUSING ON RACE, EQUITY AND INCLUSION WILL STRENGTHEN THE FABRIC OF YOUR UNITED WAY.

UWW is evolving our business model in response to fundamental shifts in technology, globalization, and increasing racial and ethnic diversity in the U.S. For instance, ensuring that your United Way is an inclusive workplace for people of many racial and ethnic backgrounds will enable you to attract and retain talented individuals to serve your mission. It will enable you to partner even more effectively with a wider range of individuals and organizations in your community. It will bring new insights and strategies into every aspect of your work.



In the workbook, you will find "Making the Case for Change Guiding Questions," a tool to help you create your own case for change.



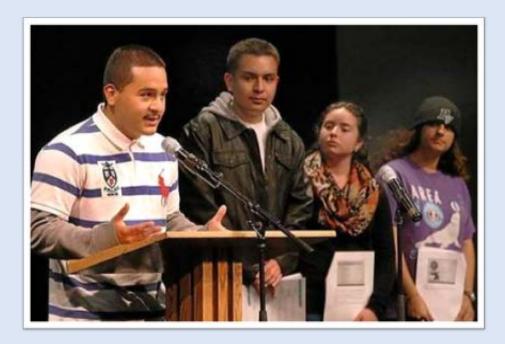
Introduction



# CASE STUDY

# **UNITED WAY OF SANTA CRUZ COUNTY**

Capitola, CA, POP-3 (250K-499.9K Individuals Served)





United Way of Santa Cruz County (UWSCC) helped launch the Youth Violence Prevention Task-Force (YVPT) and county-wide strategic planning process in 2012 in partnership with Santa Cruz County Criminal Justice Council. This issue of youth violence (especially for youth of color) effects Santa Cruz County more than almost any county in the United States.

Within a year, The Youth Violence Prevention Task Force completed the first Status on Youth Violence report for Santa Cruz County. Representing input from over 200 stakeholders through two community summits and monthly task force meetings, the report presents local primary and secondary data on over 60 indicators that are known risk and protective factors for youth violence. This outreach included communities that UWSCC typically does not hear from: focus groups in English and Spanish, migrant parents, and grass roots and social justice organizations.

### YOUTH VIOLENCE STRATEGIC PLAN

After completing the Status on Youth Violence report, a strategic plan was created to address these issues. The YVPT developed a 3-5 year Youth Violence Strategic Plan that would begin in 2016 to reduce youth violence in Santa Cruz County. These following focus areas were developed based on qualitative and quantitative data collection, input collected at community summits and input from task force members.

- · Ensure supported and functioning families
- Increase program and system effectiveness
- · Promote positive youth development
- · Foster safe and vibrant neighborhoods
- · Increase equity and reduce racial and ethnic disparities
- Authentic community engagement

As a result of this work, issues of equity have become a consistent theme of UWSCC and they have established themselves as an organization with a critical role to play in this work. UWSCC is seeing the power of leading by example; making shifts internally and being able to speak to their efforts to do things differently; seeing increased support and momentum for this work with partners.



Part One: Get Ready



## 2. BUILD YOUR TEAM AND MAP OUT YOUR PROCESS

You're embarking on a change and it's something you can't facilitate on your own. You'll need a Race, Equity and Inclusion Strategy Team to help you assess where your United Way is on its race, equity and inclusion journey; articulate what you hope to accomplish; design the process; and plan the changes and activities necessary to get you there.

You may also need support from capacity builders (facilitators, trainers, or consultants) to design and implement parts of your process. This early stage is all about assessing your United Way's readiness to explicitly focus on race, equity and inclusion. The collaborative process will include a combination of learning, planning, coaching and other activities that lead to a plan. This won't be your only assessment, just an important first step.

### In this section, we'll explore how to

- **PULL TOGETHER YOUR RACE, EQUITY AND INCLUSION STRATEGY TEAM**
- **IDENTIFY EXTERNAL RESOURCES. ASSESS READINESS** AND EXPLORE STAKEHOLDER INTERESTS
- **FOCUS ON THE WHEEL OF CHANGE AND DESIGN YOUR** PATHWAY TO ACTION.

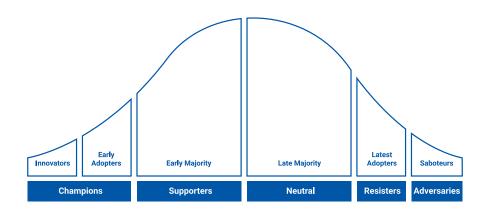
Although the guidance and tools in this section focus on your internal organization, they can also be useful to support community impact planning.

### PULL TOGETHER YOUR RACE, EQUITY AND INCLUSION STRATEGY TEAM.

You need a group to think through how to lead this change. We recommend that you assemble a Race, Equity and Inclusion (REI) Strategy Team that includes people from different organizational roles, racial/ethnic backgrounds, generations and genders. They could be all-volunteer or a combination of stakeholders who volunteer and stakeholders whom you recruit based on their experience with race, equity and inclusion work. Stakeholders on a Race, Equity and Inclusion Strategy team may include staff, program participants, community members and/or board members.

At this stage, look for innovators and early adopters who are already working on these issues and willing enthusiasts who may not be in motion yet. You'll need a combination of experience and "beginner's mind" to design a process that works for everyone. They should work with you to map out and guide your change process every step of the way.

Begin by building community—share stories of your identities and interest in the topic. Then work to develop shared language and understanding of the team's role. Be sure to explore the Case for Change and Big Picture with the team, refining as needed based on their input.





### Tools in the workbook to support this section:

Tool: Sample Team Structure
Tool: Sample Race, Equity and Inclusion Strategy Team Charter

Tool: Sample Meeting Topics to Map Out Your Process.....





# 2. BUILD YOUR TEAM AND MAP OUT YOUR PROCESS, CONT.

### **IDENTIFY EXTERNAL RESOURCES.**

As a leader, you're likely to learn that you can move many parts of the work forward on your own in partnership with the Race, Equity and Inclusion Strategy Team. Your collaboration may also value advice and guidance from external parties. Here are a few questions to ask yourself as you begin your work:

- · What is my level of knowledge, comfort and skill in:
  - Discussing issues related to race, equity and inclusion
  - > Facilitating discussions about race, equity and inclusion
  - Designing collaborative planning or organizational change processes
- What skills and experience do Race, Equity and Inclusion Strategy Team members have in:
  - Discussing issues related to race, equity and inclusion
  - > Facilitating discussions about race, equity and inclusion
  - Designing collaborative planning or organizational change processes
- · Among our community partner organizations, who is a step or two ahead of us in their focus on race, equity and inclusion? What could we learn from them? Who has supported them in their work? How could we work together (e.g., co-sponsor a workshop)?
- · Do we have a community advisory group or other ongoing way to engage with our program participants? How could we tap into their expertise?
- · Who else could support some of our efforts to prepare for a more explicit focus on race, equity and inclusion? Which local researchers, trainers, facilitators, organizers, or organizational change consultants could we tap?

### ASSESS READINESS AND EXPLORE STAKEHOLDER INTERESTS

To design a planning and learning process that will inspire people and create positive change, think systematically about your stakeholders: what's important to them; how issues of race, equity and inclusion affect them; and how ready your United Way and community are to explicitly address race, equity and inclusion. You want to identify early adopters and others who will enthusiastically champion the focus on race, equity and inclusion.

On the other side of the spectrum, you'll also want to identify possible opponents and sources of resistance to develop strategies for addressing them. In this stage, you'll want to engage with some of your stakeholders to pressure-test the team's thinking through one-on-one conversations, small group discussions, focus groups, or surveys.





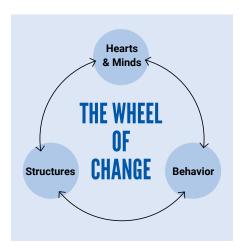
### Tools in the workbook to support this section:

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# 2. BUILD YOUR TEAM AND MAP OUT YOUR PROCESS, CONT.



# FOCUS ON THE WHEEL OF CHANGE<sup>1</sup>

As in all organizational development work, making and sustaining change related to race, equity and inclusion overlaps in three arenas:

- Organizational structures and policies-how they either support or impede your race, equity and inclusion goals
- Hearts and minds—the individual and organizational focus on values, knowledge, beliefs and commitment
- Behaviors and practices—how individuals and organizational culture change with new policies and practices

The history of work focused on race, equity and inclusion is full of debates about the "right way" to actualize our visions. In fact, there's no single "right" strategy. If we engage hearts and minds

but don't focus on structures or behaviors, people will likely continue to operate in the same ways as always. If we only focus on changing structures, people won't understand or be committed to the change and continue to practice business as usual, even within new structures.

Focusing on individual behavioral change is important, but it won't stick without also engaging hearts and minds and it won't add up to the change you seek if there are no structural shifts to support new behaviors. So it's important to pull from each of these strategies. Before your Race, Equity and Inclusion Strategy Team begins to map out your process, consider how you can engage all three domains of the Wheel of Change.

# DESIGN YOUR PATHWAY TO ACTION<sup>2</sup>

Once you have a strong sense of your stakeholders' interests and needs—and a good idea of how to balance your focus on hearts and minds, structures and behaviors—it's time to map out your Pathway to Action. This is a combination of planning and learning activities that will build shared language and a practical plan.

Think through the outcomes (e.g., shared understandings or agreements), products (e.g., vision and action plans), or other milestones you want to achieve during your learning and planning process.

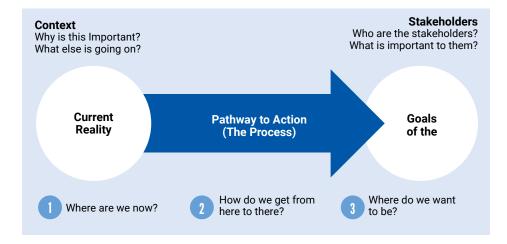
You and the Race, Equity and Inclusion Strategy Team should establish a logic or flow of topics. This could include:

- Learning/building a shared understanding of racial discrimination
- Naming and healing from past harms caused by racism within your United Way
- Agreeing on a vision of what racial equity will look like in our community
- Diving into how opportunities and challenges related to race, equity and inclusion have shown up historically, and how they currently manifest in your community and your United Way
- Identifying strategies to pursue equity and inclusion within your United Way and within your community.
- · Developing a plan of action.

Think through how this process aligns with other organizational and community

processes (e.g., strategic planning process, annual operational planning, community-wide dialogues).

Think about the kinds of teams you'll need to move through your process. For some, the Race, Equity and Inclusion Strategy Team may be the only team that you need. Once they've designed the process, they can take on the role of developing the plan with input from your stakeholders. You also may need to set up short-term working groups or task teams focused on a specific topic (e.g., housing, employment) or activity (e.g., communications). No matter what kinds of teams you create, be clear about who will make final decisions about the plan of action and who you need to engage for input and feedback along the way.



<sup>&</sup>lt;sup>1</sup>The Wheel of Change is created and copyrighted by Robert Gass. Reprinted with permission. The tool is available online at http://stproject.org/toolkit\_tool/wheel-of-change-executive-overview-2/

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# 2. BUILD YOUR TEAM AND MAP OUT YOUR PROCESS, CONT.

Then you're ready to think about concrete learning and planning activities. A typical process will involve some combination of the following:

### **DIALOGUE, HEALING, OR TEAM BUILDING**

Teams need time and space to learn about members' personal experiences with race, equity and inclusion. This is an opportunity not only to share about one another's backgrounds, but also to unpack difficult situations or repair harms that may have happened within your United Way. Often this kind of dialogue is important before diving into initial learning or planning and revisiting them later in the process.

### **LEARNING**

This could include workshops focused on race, equity and inclusion content and concepts. It could also include workshops focused on collaboration, facilitation, or community-organizing practices to support race, equity and inclusion efforts. (See Tools section for Learning Resources.)

### **PLANNING**

Topics could include developing a shared understanding of problems and issues, a shared vision of a better future. a plan of action and ways to monitor implementation and assess impact. The "Seven Steps to Embrace Race Equity in Part Two of This Practice Guide" provides a useful framework for planning focused on specific areas of impact.

Part One: Get Ready

### **AFFINITY GROUPS**

Individuals often need ongoing support to grapple with how racism affects their lives and work. Affinity groups or caucuses are a way for people to explore issues in samerace spaces.

### COACHING

One-on-one coaching is often particularly useful for people in leadership and management roles who may be struggling with how to understand their impact and practice more equitable leadership.

Don't be surprised if it takes you several months to get to this stage. The timeline for the learning and planning process itself may be a shock. It's common for folks to anticipate a three to six month process, then discover that they need much more time to learn together and engage stakeholders effectively. 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 it would if a small team from your staff cooked up a plan on its own. However, you'd then 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 to build a constituency for the plan and increase the odds that it will be implemented. In addition, you're actually doing race, equity and inclusion work at every stage, strengthening the muscles and building organizational readiness.



You also may want to create a simple visual map to summarize the different activities in your pathway and identify facilitators outside of your team to support them.



### Tools in the workbook to support this section:

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Tool: Sample Race, Equity and Inclusion Strategy Team Charter	6
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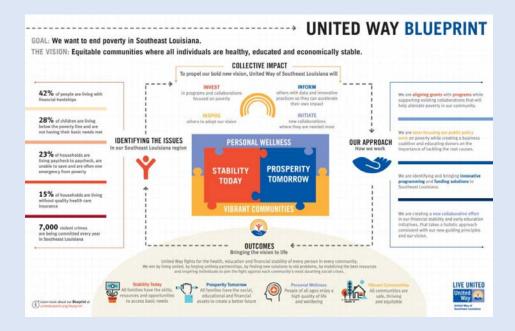
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# **UNITED WAY OF SOUTHEAST LOUISIANA**

New Orleans, LA-POP1 (More than 1M Individuals Served)



### MAP OUT YOUR PLANNING AND LEARNING PROCESS.

United Way of Southeast Louisiana (UWSELA), in alignment with their Blueprint for Prosperity, launched a new grant process in 2016 with a laser-focus on poverty eradication. Embedded in the Blueprint and the proposal are six guiding principles that UWSELA and any funded partner, program, or collaboration must commit themselves to. These principles include: Connectivity, Equity, Lived Experience, Long-term Commitment, Shared Responsibility and Systems Change.

### **BLUEPRINT FOR PROSPERITY**

UWSELA's new strategic plan will guide their efforts to eradicate poverty across the region. The plan includes guiding principles that each United Way partner, program, or collaboration will commit to, including Equity.

### **Key Equity-Focused Actions:**

- Interview United Way partner agencies to frame the equity conversation assess awareness, interest, capacity
- · Survey United Way internal practices and operations for agency
- Develop equity indicators that are tied to each impact outcome Stability Today, Prosperity Tomorrow, Personal Wellness, Vibrant Communities
- · Co-sponsor community Racial Equity Institute trainings with city government to increase awareness with key stakeholders
- · Partner with The Data Center, a local nonprofit that gathers, analyzes, and shares data for government, nonprofits, businesses, and the media

United Way of Southeast Louisiana (UWSELA), in alignment with their Blueprint for Prosperity, launched a new grant process in 2016 with a laser-focus on poverty eradication. Embedded in the Blueprint and the proposal are six guiding principles that UWSELA and any funded partner, program, or collaboration must commit themselves to. These principles include: Connectivity, Equity, Lived Experience, Long-term Commitment, Shared Responsibility, and Systems Change



Part One: Get Ready

# 3. Bring Champions Together and Launch Your Process

While you're planning a collaborative process with roles for people throughout your United Way and community, there's an important part for organizational and community leaders to play. This is the moment when you'll connect with key leaders (mostly internal to your UW although sometimes external support can be a powerful motivator) who can champion the effort by speaking clearly and explicitly about the need to focus on race, equity and inclusion; identifying resources (including staff time and "real estate" on critical meeting agendas); and removing obstacles. With their support, the next step is to launch the planning and learning process you and your team have designed.

In this section, we'll explore how to

**HOW TO ENGAGE CHAMPIONS** 

**ENGAGE ADDITIONAL EARLY ADOPTERS** 

**MAKE AN AUTHENTIC INVITATION** 

### **ENGAGE CHAMPIONS**

As you map out your planning process, you will have completed at least an initial stakeholder analysis. By now, you have a good sense of who will be supportive champions and supporters of your efforts to focus on race, equity and inclusion; who will likely oppose your efforts; and who occupies the "influenceable middle" of the adoption curve. Although you don't necessarily need all senior leaders to be champions, you will need the support of at least a few well-positioned people to build the will and resources to move your change process forward. Think of it the same way you'd think of a capital campaign, identifying lead investors before you go public with an ask for others to join.

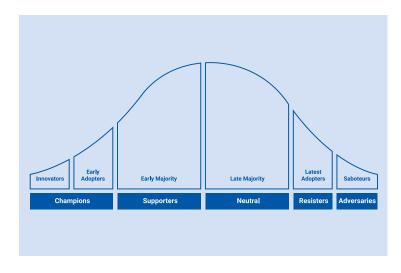
Champions are typically people with positional power, including senior staff and board members of your United Way; senior staff or board members in partner organizations; leaders of key community groups in your area; highly visible donors; and public officials. A top-down "blessing" from these leaders and their public support is not all you need to move toward deeper equity and inclusion, but they will make the job of securing resources (including time and attention) and building alignment much easier.

You'll likely need a variety of methods to engage champions. We suggest starting with a series of one-on-one meetings. Sometimes champions function best as individual advisors; sometimes they function best as a group that can receive periodic updates and share advice together. Regardless of the engagement methods, you'll want to develop your ask of each individual.

### Some examples include:

- · Public affirmations and regular mentions of the efforts in spoken and written comments
- · Specific actions to model equity and inclusion in their day-to-day work
- Agreement to invest organizational resources (e.g., funding, staff time, reputation)
- · Agreement to invest their own time (e.g., coming together to stay abreast of the efforts, advising as needed, removing barriers to equity and inclusion, participating in key learning and planning events alongside other stakeholders)

If key leaders aren't supportive, a minimal ask could be an agreement to proceed and not to create barriers or otherwise sabotage the work. In this case, it's critical to be clear about who has the final decision-making power on each section because you don't want your Race, Equity and Inclusion Strategy Team to invest a lot of work only to have it overturned. Sometimes, it can be appropriate to find others—such as a partner corporation, a donor, or an important community group—to help make the case with a resistant leader.





# 3. BRING CHAMPIONS TOGETHER AND LAUNCH YOUR PROCESS, CONT.

### **ENGAGE ADDITIONAL EARLY ADOPTERS**

Your Race, Equity and Inclusion Strategy Team members are your earliest champions for the process. At this stage, you'll also want to engage others who are already working on race, equity and inclusion, regardless of where they sit in the formal hierarchy of your United Way or other organizations or companies. Bring them together to engage with your case for change and learn about what each is doing. Create an ongoing learning community where they can share practices, support one another and strategize about how to move the work forward in your United Way and across your community.

### MAKE AN AUTHENTIC INVITATION

In fund development and community organizing, people respond to authentic invitations from folks they trust. The same principle applies to engaging champions in working together around race, equity and inclusion. You're inviting people to be part of a rewarding and sometimes challenging process of creating a more positive future for your United Way and your community. Consider these Six Conversations that Matter as you prepare to engage with champions.

"To open the community to an alternative future, start with the invitation conversation. Since all the other conversations lead to one another, sequence is not all that critical. It's important to understand that some are more difficult than others, especially in communities where [people] are just beginning to engage with one another. Certain conversations are high-risk and require a greater level of trust among people than others to have meaning. A good meeting design begins with less-demanding ones and ends with the more-difficult ones.

### Invitation conversation.

Transformation occurs through choice, not mandate. Invitation is the call to create an alternative future. What is the invitation we can make to support people to participate and own the relationships, tasks and process that lead to success?

### Possibility conversation.

This focuses on what we want our future to be as opposed to problem solving the past. It frees people to innovate, challenge the status quo, break new ground and create new futures that make a difference.

### Ownership conversation.

This conversation focuses on whose organization or task is this? It asks: How have I contributed to creating current reality? Confusion, blame and waiting for someone else to change are a defense against ownership and personal power.

### Dissent conversation.

This gives people the space to say no. If you can't say no, your yes has no meaning. Give people a chance to express their doubts and reservations, as a way of clarifying their roles, needs and yearnings within the vision and mission. Genuine commitment begins with doubt, and "no" is an expression of people finding their space and role in the strategy.

### Commitment conversation.

This conversation is about making promises to peers about your contribution to the success. It asks: What promise am I willing to make to this enterprise? And, what price am I willing to pay for success? It is a promise for the sake of a larger purpose, not for personal return.

### Gifts conversation.

Rather than focus on deficiencies and weaknesses, we focus on the gifts and assets we bring and capitalize on those to make the best and highest contribution. Confront people with their core gifts that can make the difference and change lives."



### Tools in the workbook to support this section:

Tool: Designing Effective Meetings—





Introduction

Part One: Get Ready





# **UNITED WAY OF METROPOLITAN DALLAS**

Dallas, TX-POP1 (More than 1M Individuals Served)



United Way of Metropolitan Dallas (UWMD) recently discovered that Southern Dallas presents a significant opportunity for growth, comprising the largest inventory of land and workforce potential in Dallas County. However, the area faces high levels of generational poverty. While home to 45% of the Dallas families, the area represents only 15% of the tax base. Additionally, 41% of South Dallas neighborhoods are living at or below the poverty line.

In these communities, grassroots organizations such as small nonprofits, congregations and neighborhood associations have expanded to provide needed services. However, many of these organizations do not have the internal capacity or systems in place to compete with more established nonprofits and receive funding from larger corporations and foundations. Without access to funding, nonprofits are unable to expand their services to meet high levels of need. The funding community sees this deep level of need but have been unable to identify strong and stable partners in under-resourced, high-need communities. UWMD saw this as an opportunity for equitable change.

### NONPROFIT INFRASTRUCTURE INITIATIVE

UWMD partnered with the University of North Texas at Dallas and the State Fair of Texas to provide ten nonprofits in the South Dallas area with a 6 month, 40 hour course covering:

- · Service Delivery Models
- · Fundraising and Financials
- · Advocacy and Marketing
- · Board, Staff and Volunteer Management
- Pitch Day at completion for \$10,000 capacity grants
- · Measured growth with the Organizational Capacity Assessment Tool

### **Program Results:**

- · 90% of organizations were minority-led
- · 90% of organizations were women-led
- 100% of organizations improved in all measured areas
- · Funding allowed agencies to invest in financial audits and marketing materials
- Executive Directors are better able to network and apply for funding
- · UWMD gained more trust with the community
- · Funders are more responsive to grassroot organization needs
- Next steps for this initiative include a new United Way capacity building model for the local nonprofit sector across Metro Dallas.

# 4. PREPARE YOURSELF

Whether or not you engage a facilitator or consultant to support your process, as a leader you'll be engaging individuals and groups in the work of focusing on race, equity and inclusion. In other words, you'll be facilitating a lot of conversations. "Facilitating" simply means making it easy for people to think, learn, agree and act together. That can happen in large, highly structured meetings, informal gatherings and one-on-one conversations.

As you reach out to others, you'll want to make sure that you're also "doing your own work." That means deepening your self-awareness about how race, equity and inclusion matter in your life and work, and grounding yourself in your deepest and most powerful values and practices. It also means showing up with openness and getting ready to facilitate dialogue and planning with others. No doubt you're already on this lifelong journey. We offer some ideas to help you continue to grow.

Conversations that aim for deeper, shared understanding and solid agreements can challenge the most skilled leaders and facilitators, particularly when the subject is race, racism, equity and inclusion.

They are likely to encounter additional challenges because of the complexity of the issues and their deep connections to individuals' sense of personal and cultural identity, as well as the deep emotions that accompany those experiences and collective memories.

Diving instructors must learn to function effectively at depths well below those where they will guide groups of divers. The same is true for leaders and facilitators who engage others in conversations about race, equity and inclusion. They should be experienced at going deeper than the groups they will lead. In addition to the kind of due diligence required to facilitate related conversations, consider these important aspects of your preparation:

### Prepare yourself to serve.

Guiding individuals and groups through conversations focused on race, equity and inclusion requires that you recognize who you are and how you can use yourself as a tool. Beyond your skills, technique and knowledge, you'll need to draw on your own creativity, spirit and intuition. Find ways to strengthen your self-awareness about your racial identity and cultivate the qualities a collaborative learner and leader. In this section of the workbook, we

offer a few thoughts about how to deepen the well from which you draw so you can support others in their journey.

### **Prepare for the process** of the conversations.

Your role as a facilitator, whether formal or informal, is to serve the highest aspirations of the people in the conversation, ensuring that everyone is able to participate and treated with respect and dignity. Talking about race and racism is challenging for many groups and individuals. You'll need a robust set of strategies, methods and tools to design and guide the conversations. We find that creating and facilitating a well-designed process minimizes the likelihood that the experience will be unnecessarily difficult or drive participants further away from the issue. In this section of the workbook, we offer some specific guidance to prepare and facilitate the process.

### Prepare for the content of the conversations.

In conversations about race, equity and inclusion, you'll likely be called upon to provide guidance on tough questions and may even need to present some content (such as definitions of terms). Even if this is not the case, you'll need a deep understanding of the content in order to serve the group well by listening for underlying meaning, unearthing and testing

assumptions, and synthesizing parts of the conversation, noticing what might be causing people to get stuck, and reflecting back to the speakers in ways that allows for deeper insight and agreement to emerge. In this section of the workbook, we offer some guidance about specific issues to learn about and some predictable dynamics to anticipate.

As mentioned in the section focused on building your team, it's wise to consider whether you would benefit from engaging an external resource person (e.g., facilitator, trainer, or consultant) who has led race, equity and inclusion processes before. Their presence can support the overall design process and allow you and others to participate fully in specific conversations and activities along the way. External resource people can bring useful experience and information to your United Way. If you choose this route for some conversations or pieces of the work, then it's important to find people who can understand, support and strengthen your overall goals and work well with your Race, Equity and Inclusion Strategy Team and its values.



### Tools in the workbook to support this section:

Tool: Prepare to Serve	86
Tool: Preparing for the Process of Conversations	87
Tool: Preparing for the Content of the Conversation	89





# 5. BUILD SHARED LANGUAGE AND ANALYSIS

As you work your way through the steps discussed above, deepen your familiarity with core concepts related to race, equity and inclusion, and build a common way of thinking about these concepts with your Race, Equity and Inclusion Strategy Team and champions. Building a shared understanding of core concepts is essential to working explicitly on race, equity and inclusion. We offer a few important concepts below to get you started.

### **GETTING STARTED**

### Race<sup>4</sup>

A socially constructed way of grouping people based on skin color and other apparent physical differences, which has no genetic or scientific basis. The concept was created and used to justify social and economic oppression of Black, Indigenous and other people of color by White people. (See racism definition below for more details.) The ideology of race has become embedded in our identities, institutions and culture, and is used as a basis for discrimination and domination.5

### **Equity**

Equity is the intentional inclusion of everyone in society. Equity is achieved when systemic, institutional, and historical barriers based on race, gender, sexual orientation, and other identities are dismantled and no longer determine socioeconomic, education and health outcomes.

### Inclusion<sup>6</sup>

A value and practice of ensuring that people feel they belong and their input is valued by the whole (group, organization, society, or system), particularly regarding decisions that affect their lives.

### **Equity-mindedness**

Being willing and able to:

- · Call attention to patterns of inequitable outcomes
- Take personal and institutional responsibility for the success of their program participants (members, students, constituents)
- · Critically reassess their own practices
- Demonstrate race-consciousness
- · Understand the social and historical context of exclusionary practices in their field/area of work.7

### Racism

A system of oppression exercised by the dominant racial group (Whites) over non-dominant racial groups (Black, Indigenous and other people of color), based on the socially constructed concept of race. It is a system of oppression created to justify a social, political and economic hierarchy initially constructed with White people at the top, Black and Indigenous people at the bottom, and other groups of people of color slotted in between. Racism is what happens at the intersection of race prejudice and power.8

### · Internalized racism

The private beliefs, prejudices and ideas individuals have about the superiority of Whites and the inferiority of Black, Indigenous and other people of color. Among Whites, it manifests as internalized racial superiority. Among Black, Indigenous and other people of color, it manifests as internalized oppression.

### · Interpersonal racism

The expression of racism between people. It occurs when individuals' private beliefs affect their interactions.

### Institutional racism

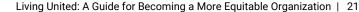
Discriminatory treatment, unfair policies and practices, inequitable opportunities and impacts within organizations and institutions based on race. It routinely produces racially inequitable outcomes for Black, Indigenous and other people of color and advantages for White people. Individuals within institutions take on the power of the institution when they reinforce racial inequities.

### Structural racism

A system in which public policies, institutional practices, cultural representations and other norms work in various, often reinforcing ways to perpetuate racial group inequality. It is racial bias among institutions and across society. It involves the cumulative and compounding effects of an array of societal factors, including the history, culture, ideology and interactions of institutions and policies that systematically privilege White people and disadvantage Black, Indigenous and other people of color.

### Anti-Black racism

Specifically targets and places Black people at the bottom of the racial hierarchy. Although racism affects people of color from all backgrounds, it has a particular impact on Black people. It's important to understand these nuances so we don't replicate them in our efforts to combat racism and build solidarity among different people of color groups.



<sup>&</sup>lt;sup>4</sup>Adapted from Race: The Power of an Illusion, San Francisco: California Newsreel, 2003,

<sup>&</sup>lt;sup>5</sup>Omi, M. & Winant, H. (1994). Racial formation in the United States: From the 1960s to the 1990s. New York and London: Routlege as quoted in Seven Steps to Embrace Race Equity, Annie E. Casey Foundation

<sup>&</sup>lt;sup>6</sup>Adapted from The Equity and Inclusion Campaign.

Adapted from What is Equity-Mindedness, Center for Urban Education, University of Southern California,

https://cue.usc.edu/equity/equity-mindedness/

<sup>&</sup>lt;sup>8</sup>Adapted from multiple sources, including: Race Forward, Kirwan Institute for the Study of Race and Ethnicity, People's Institute for Survival and Beyond.





# 5. BUILD SHARED LANGUAGE AND ANALYSIS, CONT.

In addition to understanding the individual concepts, you should also help your team understand and connect the relationship between them and avoid mistaking one for another.

### For instance:

- · You could think about the relationship between diversity, equity and inclusion this wav:
  - Diversity is about quantitative representation of people with different backgrounds.
  - > Inclusion is about the experience of belonging and meaningful participation in decisions that affect one's life or work.
  - Equity is about the distribution of power and resources and ultimate outcomes on qualityof-work or quality-of-life measures.
- Since diversity is typically the easiest of these three to measure, organizations often end up using diversity metrics as proxies for inclusion or equity outcomes.
- Similarly, it's common for people in organizations to confuse diversity strategies (e.g., hiring and recruitment) or inclusion strategies (e.g., training in effective cross-race/cross-cultural interactions or organizational culture change efforts) for equity strategies (e.g., specific efforts to develop and promote staff of color from within, programming or policy advocacy aimed at addressing structural barriers). Then, when the diversity or inclusion strategies fail to produce more equitable outcomes, champions experience surprise, disappointment, frustration, or worse, while skeptics and opponents feel justified.

### **GOING DEEPER**

See the Working Glossary of Core Concepts in the workbook for a list of tools for a deeper dive plus details about the following concepts

- Class
- Diversity
- · Dominant culture
- Intersectionality
- · Microaggressions
- · Racial justice

- Racial privilege
- · Racial oppression
- · Systemic equity
- Unconscious bias/ implicit association
- White supremacy
- · White supremacy culture

For even more on the history of systemic racism, racist ideas and anti-Blackness in the United States as well as other core concepts, consult these resources.

### A FEW OF OUR FAVORITE BOOKS

- The Color of Law: A Forgotten History of How Our Government Segregated America Richard Rothstein
- · Stamped from the Beginning: The Definitive History of Racist Ideas in America Ibram Kendi

### A FEW KEY ONLINE RESOURCES

- RacialEquityTools.org Core Concepts page includes a wide variety of readings, video resources and curricula (some free and some at a modest cost).
- Seeing White Series, Scene on Radio This 14-part series features some of the authors above and many others.
- Decoded is "a weekly series on MTV where the fearless Franchesca Ramsey tackles race, pop culture and other uncomfortable things, in funny and thought-provoking ways. Half sketch comedy, half vlog"
- Race + Class, readings and resources from CLASS Action
- · Understanding Race: Are We So Different, an interactive companion to the traveling science museum of the same name, with notes on history, science and human variation and lived experiences

### TRAINING RESOURCES

See on-line resources above, plus:

- . Cracking the Codes: The System of Racial Inequity, World Trust
- · Project Implicit, Mahzarin Banaji and Anthony Greenwald This online test of implicit association (a.k.a. unconscious bias) offers separate tests focused on race, gender, sexual orientation and other topics.
- · Managing Bias, Facebook

This series of short training videos for employees and managers focuses on unconscious bias and covers related topics including introductions and first impressions, stereotypes and performance bias and the business case for diversity and inclusion.

Give Your Own Unbiasing Workshop, Google

This resource includes a customizable slide deck and facilitator's agenda to offer workshops about unconscious bias.

. Diversity Toolkit: A Guide to Discussing Identity, Power and Privilege This facilitator's guide outlines a day-long workshop.







# **UNITED WAY OF WASHTENAW COUNTY**

Ann Arbor, MI-POP4 (100K-249.9K Individuals Served)

As part of their strategic planning process in 2017, United Way of Washtenaw County (UWWC) made a public commitment to diversity, equity and inclusion (DEI) in order to find fuller expression of their mission and values. Viewing impact work through an equity lens is fundamental to the future of the organization; racism and poverty are perceived as principal threats to UWWC's mission.

### INTERNAL CAPACITY BUILDING

Examples of our DEI work being realized:

- · Mindful shift in relationships to local, women -owned and/or people of color- owned and operated businesses. For example, meetings now catered by a locally-owned woman of color-led business instead of Panera.
- · Hiring practices were adjusted to remove barriers; where we post, education stipulation removed if possible, and salary ranges posted
- · Commitment to hiring and retaining a workforce of diverse social identities
- · Shifting where and how we invest our funding, and annually publishing these data in our annual report.

When it comes to funding local organizations, UWWC staff is building their understanding of "dominant culture" and recognizing how their grant making practices may do more harm, in some cases, than good. They now put a greater focus on values-alignment with partners rather than compliance and monitoring. UWWC shares all that they're learning through open-sourcing content at www.uwgive.org/equity.

OUR COMMITMENT TO TRANSPARENT GRANT MAKING PRACTICES THROUGH AN EQUITY LENS:	2017	2018
Grants to zip codes 48197/98 - geographies that stand the most to gain	52%	63%
Grants intended to advance racial equity	71%	75%
Grants intended to advance socio-economic equity	87%	91%
Capacity building grants to people of color-led organizations	64%	89%

In service of broader community DEI impact, UWWC is building the capacity of local nonprofits to develop their own DEI agenda and elevating community conversations about DEI, we are: 30+ local nonprofits participated in a series of DEI workshops UWWC funded and co-developed on how to develop an agency specific equity lens in governance and operational practices with Nonprofit Enterprise at Work (NEW), a local management support organization. Funding the development and implementation by NEW of The Leaders of Color Fellowship an intensive 6-month cohort-based program that seeks to change the face of leadership in Washtenaw County by investing in local leaders of color from the nonprofit, public, private and municipal sectors.



**Tools in the workbook to support this section:** 

Tools for a Deeper Dive ..... Tool: Working Glossary of Core Concepts.....



# PART TWO Practice Equity Daily

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Case Study: Central Carolina/Charlotte, North Carolina	
Case Study: Baltimore, Maryland	
5. Design Programs & Policies that are Targeted & Universal	



# PART TWO: PRACTICE EQUITY DAILY



As you integrate a focus on race, equity and inclusion, you'll need to build individual and organizational capacity so you can move the work forward together productively and sustainably.

In this part of the toolkit, you'll find five sections to help you build your organizational capacity and the capacity of individuals in your organizational system. The first three sections are based on "Awake to Woke to Work: Building a Race Equity Culture," the organizational development framework by Equity in the Center. The fourth section draws on multiple resources. The fifth section is a brief summary. The UWW Community Impact Team is developing an equity framework to guide deeper work for Community Impact.

### In this part of the toolkit, you'll find five sections to help you get started:

### 1. BUILD EQUITY-MINDED **CULTURE, STRUCTURES** AND SYSTEMS.

In order to integrate race, equity and inclusion into your day-to-day work, you'll need an organizational culture and strong commitment, along with processes and systems that support your intentions. Here, we will explore leverage points for change, including the actions key stakeholders can take and structural factors related to your learning environment, organizational culture and commitment to using qualitative and quantitative data to drive decision making.

### 2. NURTURE A **DIVERSE, EQUITY-MINDED WORKFORCE.**

This is essential to moving your equity work forward. In this section, you'll find guidance for determining job requirements, recruitment, hiring, onboarding and professional development to support you in facilitating inclusion and leveraging the power of diversity in service of your mission.

### 3. NURTURE A DIVERSE, **EQUITY-MINDED BOARD.**

Along with an equity-minded workforce, you'll need your board's support. In this section, you'll find guidance for engaging with board members and identifying the ways that race, equity and inclusion relate to their core responsibility to steward your mission.

### 4. TELL STORIES **CENTERED ON PEOPLE** AND SYSTEMS.

Without solid data collection and analysis of disaggregated data, it's difficult to identify and address inequities and disparities. Still, the numbers alone won't align strategies to change outcomes. Humans are wired for story. We make sense of the world, our identities and our connections to others through narrative. You'll need a clear narrative that's grounded both in the lives of real people and a systemic analysis of the history and causes of inequities and disparities. You'll also need stories that help people understand why changes should happen, how change can happen and what roles they can play. In this section, you'll explore ways to talk about your race, equity and inclusion work, particularly in the context of fundraising and public communications.

### **5. DESIGN PROGRAMS AND POLICIES THAT ARE TARGETED AND** UNIVERSAL.

Equitable outcomes for families and communities don't happen all by themselves. They require a careful understanding of the experience of people who are facing racial and other barriers to their well-being. Make sure you explore and understand the systemic barriers that influence their experiences. Then you can design your programming and policy advocacy in ways that address root causes or drivers of inequities rather than just symptoms. Set universal goals and design your work to target resources and strategies to meet the specific, differentiated needs of specific subgroups.



# 1. BUILD EQUITY-MINDED CULTURE, STRUCTURES AND SYSTEMS.

To integrate race, equity and inclusion into your day-to-day work, you'll need an organizational culture and strong commitment, along with processes and systems that support the work. Here we will explore leverage points for change, including the actions key stakeholders and structural factors related to your learning environment, organizational culture and commitment to using qualitative and quantitative data to drive decision making.

### In this section, we'll explore how to

**BUILD A RACE EQUITY CULTURE** 



### **BUILD A RACE EQUITY CULTURE**

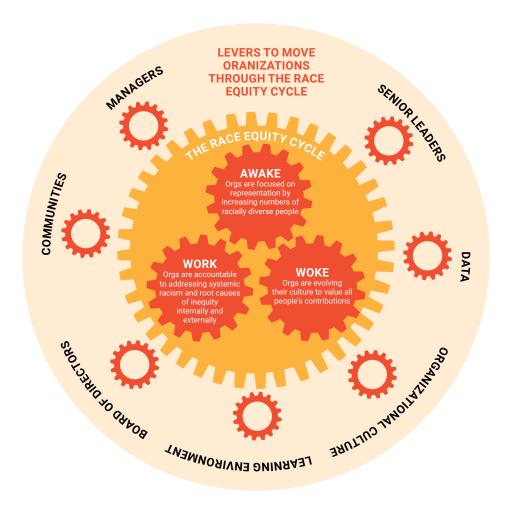
Think of organizational culture as the "glue" that holds the elements of the Wheel of Change together. Building your organization's capacity to focus on race, equity and inclusion requires specific attention to organizational culture.

In "Awake to Woke to Work," Equity in the Center describe a race equity culture as "focused on proactively counteracting race inequities inside and outside of an organization. It requires an adaptive and transformational approach that impacts behaviors and mindsets as well as practices, programs and processes.

As Ronald Heifetz states in his book, Adaptive Leadership, "Adaptive challenges can only be addressed through changes in people's priorities, beliefs, habits and loyalties. Making progress requires going beyond any authoritative expertise to mobilize discovery, shedding certain entrenched ways, tolerating losses and generating the new capacity to thrive anew.' What's more, there is no checklist or 'one size fits all' approach when it comes to the adaptive challenge of creating a Race Equity Culture; each organization has to chart its own path and define its own success using a combination of tools and tactics mixed with personal and organizational culture changes that make sense for the individual context."10

### THE RACE EQUITY CYCLE<sup>11</sup>

Your Race, Equity and Inclusion Strategy Team can review assessment data and consider where to start given your organizational history, current needs and capacity.



<sup>10</sup> Awake to Woke to Work: Building a Race Equity Culture," Equity in the Center/ProInspire. Boston, Mass: Harvard Business Press, 2009. Page 11.

<sup>11</sup> Awake to Woke to Work: Building a Race Equity Culture," Equity in the Center/ProInspire. Includes quote by Heifetz, Ronald A., Alexander Grashow, and Martin Linsky.

The Practice of Adaptive Leadership: Tools and Tactics for Changing Your Organization and the World. Boston, Mass: Harvard Business Press, 2009. Page 9. 11 Awake to Woke to Work: Building a Race Equity Culture," Equity in the Center. Includes quote by Heifetz, Ronald A., Alexander Grashow, and Martin Linsky. The Practice of Adaptive Leadership: Tools and Tactics for Changing Your Organization and the World. Boston, Mass: Harvard Business Press, 2009. Page 9.





# 1. BUILD EQUITY-MINDED CULTURE, STRUCTURES AND SYSTEMS, CONT.

### **IDENTIFY LEVERAGE POINTS FOR CHANGE**

The good news about building a race equity culture is that many leverage points exist to support you in making change in your organization. You can think of them in two categories: (1) ways to engage stakeholders in making the change; and, (2) structural supports for making change. We briefly describe each leverage point below. In the workbook, we've included key indicators of successful engagement at each stage of the Race Equity Cycle.

### **Engaging stakeholders**

As discussed in the section of Part One focused on mapping out your process, you'll need to think about effective ways to engage each of these stakeholder groups in learning and planning, so that they are able to play their various roles in building a race equity culture.

Senior leaders play an important role by using their words and actions to support the changes that build a race equity culture; prioritizing time and resources for the work; and being continually willing to participate with the staff as learners. They can demonstrate an enthusiasm for this work that can help others.

Managers also have important roles to play in modeling behaviors, learning in public, prioritizing time and resources for the work, coaching their teams to embrace change and fostering innovation.

**Board members**, in addition to learning and modeling behaviors, have a unique opportunity to ensure senior management's accountability to race equity practices and outcomes. They also have opportunities to model accountability themselves as they apply race equity principles and practices to the full range of the board's work.

Community members play a critical role in this cycle. In fact, if there's too much separation between organizations and the communities they serve, assumptions about those communities will undermine your efforts to build a race equity culture and pursue equitable outcomes. Community members can contribute to naming critical issues and possible solutions, they can be invited onto your board, inform your organization of important community history and values related to race equity and share resources.

### Structural factors

These are the arenas in which equity can be practiced daily. Your Race, Equity and Inclusion Strategy Team can choose one or more areas for initial work. Generally, organization-wide learning is a good starting place.

### **Learning Environment**

Knowledge and openness to learning is essential to race equity work and shifting your culture. You might start with learning about the levels of racism and understanding how they exist within your United Way and community. This might lead to more history about your core issues. Ongoing learning develops the muscle of talking about race and racism in order to design for more equity in your United Way, from hiring practices and meetings to decision making and data gathering.

### **Organizational Culture**

Equity work can help to fashion a more open, inclusive culture where people are more fully able to contribute their knowledge and skills. It's not just about helping new people "fit in" with the existing culture. It's about creating a culture where everyone can show up as their full selves and make their strongest contribution. It's about creating a strong sense of belonging and meaningful ways for everyone to contribute to the culture.

Inclusive, equitable organizational culture can lead to increased satisfaction as well as better outcomes. The work often starts with your Race, Equity and Inclusion Strategy Team and its commitment to always using a racial equity assessment tool, engaging in trainings and conversations and changing policies to support this commitment. Embedding equity responsibilities across all staff and board can be an end result of culture change.

### **Organizational Structure and Operations**

Structures and operations offer many places for change. On an individual level, senior leaders can develop and implement an equity plan. On an organizational level, it can include changes to the composition of the leadership team or management structure, more transparent decision-making processes, or equity considerations in vendor selection and other operations policies and practices. Most organizations' current structures were created without considering race, equity and inclusion and may even have been explicitly exclusionary or discriminatory at one point. What needs shifting in your United Way in order to foster broader diversity, deeper inclusion and more equitable outcomes?

### **Gathering and Using Data**

Data and stories are central to determining where you need to increase your attention, from monitoring staff diversity, retention and satisfaction to informing new protocols to analyzing your fundraising strategies (for example, data to analyze and expand your donor base). Targeted and transparent data can also contribute to culture change.



Part One: Get Ready

### Part Two: Practice Equity Daily





# **UNITED WAY OF RACINE COUNTY**

Racine, WI-POP4 (100K-249.9K Individuals Served)

United Way of Racine County (UWRC) has conducted community conversations about race, equity and inclusion for the last two years. These stories have informed and led their local impact strategy, and as an organization that works to create long term systemic change, UWRC knew that these conversations must be a part of the process. Community members have offered a number of barriers and solutions, and UWRC has made a commitment to creating inclusive action steps. These action steps address barriers and incorporate solutions that were identified over the last two years.

### **COMMUNITY CONVERSATIONS**

United Way engaged more than 350 residents in kitchen-table style conversations about challenges, aspirations and goals. Key questions explored include:

- · How to better understand racism community-wide?
- · How to create positive change?
- · How to take personal commitments to address bias?

### **ACTION STEPS**

UWRC implemented a number of changes in response to feedback to their community conversations. These include:

- A Declaration of Inclusion where the community is invited to pledge their respect all people
- · Establishing a Diversity Council with the purpose of engaging business leaders to create diverse, supportive workplaces
- · Creation of a community event called OneRacine, which was held October 6, 2018 to celebrate the diversity found within Racine

### REPORT OUT EVENT

UWRC produced a report of all key findings from their community conversations and shared with the public at their Community Conversation Report Out Event. The report identifies tactics to address equity barriers and incorporate solutions that were identified over the last two years. These include:

- · Adopting a lens of equity for Impact work
- · Adopting a lens of equity for Impact work
- · Adding partners to Diversity Council
- · Making OneRacine an annual event





### Tools in the workbook to support this section:

Tool: Race Equity Culture Assessment	Tool: Indicators of Successfully Building the Learning Environment109
Tool: Use Equity Primes and Protocols to Reduce Bias	Tool: Indicators of Successfully Shifting Organizational Culture111
Tool: Indicators of Successfully Engaged Senior Leadership	Tool: Shifting Organizational Structure and Operations
Tool: Indicators of Successfully Engaged Management	Tool: Indicators of Successfully Gathering and Using Data
Tool: Indicators of a Successfully Engaged Community	Tools for a Deeper Dive116



# 2. NURTURE A DIVERSE, EQUITY-MINDED WORKFORCE

This is essential to moving your equity work forward. In this section, you'll find guidance for determining job requirements, recruitment, hiring, onboarding and professional development to support you in facilitating inclusion and leveraging the power of diversity in service of your mission.

While it's important not to over-rely on building a diverse, equity-minded workforce, integrating race, equity and inclusion practices and principles into your United Way is an important step. It's also essential to balance your focus on expanding the diversity of your workforce with deepening the inclusiveness of your organizational culture as described in the preceding section. Otherwise, you're likely to create a revolving door of people who may join but will leave guickly because of challenges related to organizational culture and structure.

### **RECONSIDER JOB REQUIREMENTS**

Think about the jobs in your organization. Many job descriptions will include "bachelor's (or another) degree required." Sometimes a specific degree is actually necessary (e.g., a clinical degree for clinical work). Often, however, a degree is listed as a proxy for understanding a given set of concepts or theories; being able to solve problems effectively; writing and speaking clearly; or using research and data to inform decision making.

Instead of using a degree as a proxy, ask yourself—what is the degree a proxy for? What job results will this person need to achieve? What skills, knowledge and abilities are necessary to achieve them? Include those in your job requirements section instead. For a little inspiration, see the table below for how many people are automatically excluded from your potential candidate pool when you say a "BA or higher required."12

### **CAST A WIDE NET**

Recruiting through existing networks is one way to find candidates. And, if you stick with the same networks, you're likely to keep reproducing the same staff demographics. Once you've clearly articulated the actual skills and knowledge you need, challenge yourself to look for that talent in unconventional places. Ask yourself where people are gaining hands-on (not just academic) experience that would serve your organization well. For a given role, look for racial or ethnic affinity groups within that profession. Ask leaders of color in your community about their successful recruitment strategies.

In this section, we explore the entire arc of nurturing a diverse, equity-minded workforce, including ways to

**RECONSIDER JOB REQUIREMENTS** 

**CAST A WIDE NET** 

ELIMINATE BIAS FROM THE SCREENING AND INTERVIEW PROCESS

**WELCOME NEW STAFF** 

**ENGAGE STAFF MEANINGFULLY** 

OFFER DEVELOPMENT OPPORTUNITIES

	% OF U.S. LABOR FORCE WITH BACHELOR'S DEGREE OR HIGHER	% OF U.S. LABOR FORCE EXCLUDED BY "BA OR MORE REQUIRED"
Asian American (non-Hispanic)	60%	40%
Black/African American (non-Hispanic)	28%	<b>72</b> %
Hispanic/Latinx American	14%	86%
Native American	64%	89%
White American (non-Hispanic)	43%	57%
WORKFORCE OVERALL	40%	60%



# 2. NURTURE A DIVERSE, EQUITY-MINDED WORKFORCE, CONT.

### REMOVE BIAS FROM THE SCREENING AND INTERVIEW PROCESS

Research demonstrates how quickly unconscious bias infects the process of screening and interviewing job candidates.<sup>13</sup> Evidence shows that hiring processes produce less biased and more diverse results when they include:

- Anonymous screening processes
- · Structured, standard interview questions for each candidate
- Behavioral questions (e.g., tell me about a time when you...) and situational questions (e.g., what would you do in this situation?)
- · Collaborative interviewing and scoring
- Explicit discussion of "likability" in order to reduce the power of leaving those impressions at the unconscious level
- Samples of prior work and/or "tests" (e.g., between interview rounds, finalists develop
  a strategy for addressing an organizational problem)
- Basing compensation on a defined range for the role rather than on salary history, which tends to carry inequities from prior workplaces into yours

### **WELCOME NEW STAFF**

Onboarding can be a beautiful process that allows new staff members to embrace and be embraced by their colleagues. New staff from any background will need specific supports to set up for success. These include: clear job expectations; short-term and long-term goals related both to learning and productivity; training and access to job-related tools and data systems; opportunities to meet colleagues; regular contact with a supervisor; a careful balance of support, guidance and autonomy; opportunities to contribute to meaningful work results; and help learning the informal and unwritten rules and norms of organizational culture.

People of color and members of other historically marginalized groups typically experience additional needs for success, given the ways that unconscious and conscious bias tend to stigmatize them and structural barriers can restrict them. As discussed above, building an inclusive, equity-minded organizational culture is important for all staff, particularly for staff members of color. This doesn't just mean helping the new staff get acquainted with "the way things work around here." It also means making space for their observations and experiences to influence and shape culture, practices and processes.

For organizations that are early in the process of diversifying staff, it's very common to hire new people who have a lot of questions about typical ways of thinking and doing within the organization. Often, their observations as people viewing the organization with fresh eyes are not welcomed as useful insights, but as complaints or demands from people who "don't fit in." That's the quickest way to create a revolving door of staff.

In addition, conscious and unconscious biases often cast doubt on the competence, warmth and relatability of staff of color, particularly women of color. 

14 These perceptions from other co-workers (as well as clients, program participants, or other stakeholders) can demotivate and demoralize staff of color, eroding their confidence in their own competence and performance, thus leading to a seeming self-fulfilling prophecy.

To reduce the likelihood of stereotype threat (where an individual's performance is negatively affected by the knowledge of negative stereotypes about their group and they either consciously or unconsciously worry that their performance will fulfill the stereotype), individuals need firm knowledge that their skills and competence are a good match for their role and that others in the organization know this as well.<sup>15</sup>

### **ENGAGE STAFF MEANINGFULLY**

As discussed above in the section on organizational culture, equitable workplaces create meaningful opportunities to contribute to decisions. Make sure there are formal ways for staff to raise concerns, ask questions and propose changes or new activities that will improve the organization and its performance.

### **OFFER DEVELOPMENT OPPORTUNITIES**

In the nonprofit sector, there are significant gaps in leadership among women, Black, Indigenous and other people of color generally and women of color in particular. <sup>16</sup> Even when organizations have above-average racial/ethnic diversity on staff, it tends to be clustered near the bottom and middle of the organizational hierarchy. It's a sadly familiar story that women of color are hired in entry-level jobs and not offered opportunities for professional development or stretch delegation tasks to build skills for their next role. They can stay in the same role for years or even decades while young, mostly White college grads enter as interns, head off to conferences, have easy access to senior leaders and quickly move up the ranks.



# 2. NURTURE A DIVERSE, EQUITY-MINDED WORKFORCE, CONT.

Avoid this reality in your United Way. Challenge managers to invest in the development of their staff, with an eye on improving their performance in their current and possible future roles. Encourage managers to avoid investing selectively in people they think have "high potential" because too often, that really means people who are just like them. Be sure mangers offer stretch delegation opportunities with sufficient support and resources for Black, Indigenous and other people of color to succeed. And be sure to acknowledge staff members who are making the effort to grow.

In addition to these role-related growth opportunities and in keeping with the idea of building a learning culture (see organizational culture above), you'll want to create opportunities for your staff, board and other volunteers to be part of an ongoing learning journey on issues of race, equity and inclusion. This could include a combination of activities such as formal workshops, affinity group spaces, speaker series and staffled brown bag lunch discussions. Don't wait for something tragic to happen in your organization or community to get the conversation started.



Tools in the workbook to support this section:



Introduction

Part One: Get Ready

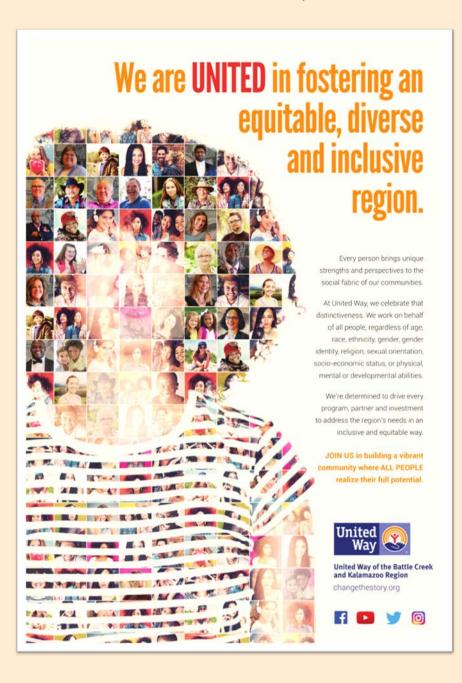
Part Two: Practice Equity Daily





# **UNITED WAY OF BATTLE CREEK AND KALAMAZOO REGION**

Kalamazoo, MI-POP4 (100K-249.9K Individuals Served)



United Way of Greater St. Louis (UWGSL) knows how crucial it is to have equitable practices and understanding in a system. The death of Michael Brown in Ferguson, MO became a symbol for the racial strife and inequality that exists throughout the United States. Missouri's Governor asked a group of regional leaders — The Ferguson Commission — to study the situation and prove a path toward change. UWGSL has worked closely with The Ferguson Commission to help inform their own priorities and build their internal capacity.

### **PUBLIC DASHBOARD**

UWGSL recently received a grant to develop a 'racial equity indicator dashboard' in response to The Ferguson Commission's call for a racial equity benchmarking process. The Equity Indicators Dashboard will be regionally launched with key partners and will serve as a road map for "the work" toward an equitable region, highlighting continued racial disparities and facilitating accountability in alignment with the Ferguson Commission's regional calls to action. UWGSL will use this dashboard as a guide for their Impact agenda.

### INTERNAL CAPACITY BUILDING

Additionally, grant funding supported the execution of intentional learning opportunities for the UWGSL's core management team as identified in their Path to Racial Equity Framework adopted in November 2017.

### These capacity-building efforts include:

- · All staff receiving DEI-focused trainings
- Inclusion and Inclusionary Leadership baselines for staff have been established
- · Select baselines, with targets, have been integrated into UWGSL's organizational scorecard which is monitored by their volunteer Organizational Development





# 3. NURTURE A DIVERSE, EQUITY-MINDED BOARD

Along with an equity-minded workforce, you'll need your board's support.

In this section, you'll find guidance for engaging with board members and identifying the ways that race, equity and inclusion relate to their core responsibility to steward your mission.

- **ENCOURAGE EQUITY-MINDEDNESS AMONG CURRENT BOARD MEMBERS**
- RECONSIDER "IDEAL" BOARD MEMBER PROFILES
- **ENGAGE MEMBERS MEANINGFULLY**
- **IDENTIFY OPPORTUNITIES TO APPLY EQUITY-MINDEDNESS** TO CORE BOARD RESPONSIBILITIES

### **ENCOURAGE EQUITY-MINDEDNESS AMONG CURRENT BOARD MEMBERS** Equity-minded board members are people who are

- · Committed to race, diversity, equity and inclusion as an ongoing priority, not a short-term initiative
- · Willing to learn and share about how race, diversity, equity and inclusion matter to them as individuals as well as the organization
- · Able to learn about and communicate in ways that reflect the needs of underrepresented segments of your community
- · Willing to address these issues as part of their role as a board member, including:
  - Formal assessments of the board and organization's culture to identify strengths and barriers to inclusion
  - > Action planning to address discriminatory or non-inclusive behaviors and help the board become more diverse, equitable and inclusive
  - Recruitment efforts that engage underrepresented demographics
  - Duilding organizational policies that address race, diversity, equity and inclusion
- · Consistent in volunteering at events that enhance their understanding of community perspectives (staff, corporate partners)

### **RECONSIDER "IDEAL" BOARD MEMBER PROFILES**

Typically, a first step in building a more diverse, inclusive and equitable board is to reconsider the kinds of contributions you want its members to make. Traditionally, they're selected for their ability to contribute to one or more of the three W's: work, wisdom, or wealth. Often, the definition of each "w" is fairly narrow.

Ask yourself: what kinds of work could be contributed by your board members? What sources of wisdom are you tapping? Remember that credentials and job-related knowledge are not the only forms of wisdom that matter for our ability to Living United. How could a more diverse set of board members-and a set of board members who reflect your community more fully-expand the wisdom about your community and the hidden assets that you could mobilize?

United Way is built on the belief that people in every income bracket are generous and can add to powerful community outcomes. As you look for board members who can contribute from their wealth, stretch yourself beyond your usual donors. How could people who are supporting grassroots philanthropy through civic associations, self-help organizations and giving circles become powerful assets on your board?

In the workbook, you'll find worksheets to help you assess your current mix of board members and work with them to identify gaps and areas for growth.

### Set goals and cast a wide net

Work with your board to identify a useful mix of skills, perspectives, experiences and backgrounds for an ideal board composition, building on the ideas about board member profiles above. Then do an inventory of your current board members. (Ask them to self-identify rather than guess at their demographics!) With a shared awareness of any gaps, you're ready to set some goals and build a plan to expand the diversity of your board.

### Recruit, interview and welcome new board members mindfully

Depending on your by-laws, you may have more or less formal requirements for your board member selection process. Regardless, you'll want to take a structured, disciplined approach to recruiting, interviewing and onboarding new board members. If you only rely on relationships within existing networks, you're likely to reproduce the same combination of gifts and the same set of gaps in your overall board composition.

If you don't have job descriptions for your board members and descriptions for leadership positions, that's a good place to start. Make sure expectations for the roles are explicit and prospective board members have an opportunity to reflect on them. Be very intentional about creating ongoing opportunities for board members to get to know each other's individual skills,



Part One: Get Ready

### Part Two: Practice Equity Daily



# 3. NURTURE A DIVERSE, EQUITY-MINDED BOARD, CONT.

backgrounds and gifts. The more "social distance" between board members in their day-to-day lives, the more you'll need to pay attention to this in the context of board meetings and activities. Otherwise, the stereotypes and power dynamics of the wider society are likely to manifest in your board as well.

### **ENGAGE MEMBERS MEANINGFULLY**

As discussed in the organizational culture and staff sections of this practice guide, board members also need meaningful opportunities to help make decisions, form strategy and shape culture. It's not enough to ask people to "come be just like us." They need the organization to be open to rethinking what it does and how based on their insights and experience. Often, this requires specific shifts in board meeting culture and processes. If you want to avoid tokenizing board members of color or board members from other marginalized groups

- Be sure your meetings feature ample time for discussion and exchanges of ideas, not just presentations and votes
- Encourage diverse board members to step into leadership roles and make sure they can actually exercise the power that goes with the role
- Encourage their active participation in all aspects of the board's work, not just on topics that seem most relevant based on their race or other aspects of their identity
- Make sure diverse members are full voting board members, not just participants in consumer (or other) advisory councils
- · Avoid asking Black, Indigenous and other people of color to be the only public spokespeople for the organization if the paid staff leadership are largely or all White
- Make sure all board members have the information they need to participate fully in decisionmaking discussions; this could include offering training or briefings on any highly technical matters that are beyond their core expertise outside of full board meetings

- · Deepen board members' cultural competency (i.e., understanding of community issues and data, especially related to communities of color and other historically disadvantaged populations)
- · Create time for board members to get to know one another and each other's perspectives
- Provide meaningful opportunities for exposure to different perspectives based on the lived experiences of community members
- Build capacity to lead on the issues residents care most about (impact, policy/advocacy, partnerships, resource development) and create more fair and equitable communities

### Identify opportunities to apply equity-mindedness to core board responsibilities

Board members typically share a common set of responsibilities. Ask board leaders and committee members to consider how race, equity and inclusion matter for each of the following aspects of the board's ongoing work, including:

- · Establish mission, direction
- Ensure resources including raising funds and securing other resources)
- · Policy making
- · Major decision making
- · Oversite, including legal, fiscal and oversite of CEO/Executive Director
- · Self-renewal of the board through active recruitment
- Serving as ambassadors to the wider community and identifying partners



### Tools in the workbook to support this section:

Tool: Cultivating Equity-Minded Board Members	Tool: Board Composition Matrix-Group Discussion Worksheet	40
Tool: Board Composition Matrix	Tools for a Deeper Dive	57





Part One: Get Ready

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# **UNITED WAY OF JACKSON COUNTY**

Medford, OR-POP4 (100K-249.9K Individuals Served)



United Way of Jackson County (UWJC) has always done equity work and has now formalized it with a Diversity, Equity and Inclusion Council. The purpose of the council is to act as advocate, facilitator and convener of education, information and accountability for the continuous learning journey of cultural agility for the United Way of Jackson County.

### **DIVERSITY, EQUITY AND INCLUSION COUNCIL**

### Responsibilities of the Diversity, Equity and Inclusion Council include:

- · Promote diversity, equity and inclusion in the committee, council, board and staff of the organization
- · Develop leaders who are educated and aware of diversity, equity and inclusion
- · Develop baseline information on where the organization is annually and design a work plan to increase cultural agility
- · Work within the organizational structure to ensure policies and procedures are in place to honor diversity, equity and inclusion
- · Represent the organization in the external environment on issues related to diversity, equity and inclusion

### **POVERTY SIMULATION**

United Way of Jackson County has begun not only looking within but reflecting on what the next steps are needed to meaningfully engage with the community. In one such case, running a poverty simulation with board members and community leaders led to the head of Juvenile Justice identifying a lack of transportation as the reason for failed probation appointments. He changed the policy immediately by adding more time and now holds probation meetings in the youth's community.

# 4. TELL STORIES CENTERED ON PEOPLE AND SYSTEMS

Without solid data collection and analysis of disaggregated data, it's difficult to identify and address inequities and disparities. Still, the numbers alone won't align strategies to change outcomes. Humans are wired for story. We make sense of the world, our identities and our connections to others through narrative. You'll need a clear narrative that's grounded both in the lives of real people and a systemic analysis of the history and causes of inequities and disparities. You'll also need stories that help people understand why changes should happen, how change can happen, and what roles they can play. In this section, you'll explore ways to talk about your race, equity and inclusion work, particularly in the context of fundraising and public communications.

### REPLACE "STOCK STORIES"

When we focus on race and racism in this country, we have a set of "stock stories" that can narrow our thinking, guide us to beliefs that are just not true, and distract us from a more complete picture.

For example, rarely in school or workplace settings do we hear about Black wealth generation or White people who acted fiercely as allies against slavery or present-day racism. Stories like Horatio Alger's "up by your own bootstraps" promote a dangerous myth that social mobility is purely a matter of persistence, concealing policies and other racialized barriers for Black, Indigenous and other people of color. Versions of these stories exist everywhere in popular and organizational cultures.

Identify how such narratives show up in your formal organizational literature and strategy, and pinpoint informal narratives that similarly describe "what it takes to succeed in this organization." Find ways to highlight stories that counter stereotypical narratives. It's good to get very specific and look to the communities in which you work to find stories of resistance or transformation, as well as some of the stories of oppression that we tend to sweep under the rug.



### REPLACE "FIX THE INDIVIDUAL" STORIES WITH "FIX THE SYSTEM" STORIES

For many, particularly in fundraising, we know that telling stories is incredibly compelling. Often, we're drawn to telling the story of the individual and how our help shifted who they are or how they were able to succeed. Instead, it can be powerful to look at the systems you're engaged with (e.g., education, housing), learn their problematic policies and histories, and share how your United Way has fixed them.

In addition, you can shift the individual stories to collective stories. How did the community get together to respond, protest, build and thereby adapt to unfavorable conditions with a creative response? Even reporting on disparities in outcomes can reinforce a narrative of the need to fix "broken people" or "broken communities," unless the data are accompanied by a narrative that explains how structural barriers (e.g., policies, practices, norms, laws) created the conditions for the disparities to exist in the first place. Frame your stories so you're not just explaining the problems but detailing solutions and helping people find a place for themselves in making a difference.





## 4. TELL STORIES CENTERED ON PEOPLE AND SYSTEMS, CONT.

#### In this section, we'll explore how to

FACILITATE STORY-SHARING

ADOPT EQUITY-MINDED LANGUAGE

CAPACITY BUILDING TRAINING

UNITED NEIGHBORHOODS

#### **FACILITATE STORY-SHARING**

Storytelling can be a great way to build empathy, relationships and knowledge within your race, equity and inclusion work, as well as for your United Way overall. Although much of this toolkit focuses on how to changes systems, processes and practices, we know individual-level change is part of changing systems. With stronger knowledge of each other's stories, we can increase connection and commitment to work focused on race, equity and inclusion. There are many ways to approach this, including resources in the workbook. Some of the common ideas include:

- · Create brown-bag lunches where staff can share pieces of their personal stories. One activity is called "I am from." You can have people write and share a poem or free write with various prompts such as: the foods I ate/eat, sights and sounds where I grew up, a phrase or saying you would hear in my family, the values communicated to me/I communicate to my kids, the favorite holiday.
- · You can set up Employee Resource Groups or affinity groups where people who share one or more identities can gather (for sharing, learning, mutual support and problem solving).

 In workshops that you create as part of your race, equity and inclusion processes and practices, you can include time for storytelling. Again, it's great to have people bring their stories and identities into this work. Many people (Black, Indigenous and other people of color, as well as White people) can experience distance from ones' ethnicity or culture. It's important to lift up what's known as well as the disconnection.

We'll be more successful in this work as people are able to look at their own personal and shared histories and name elements of culture-even their problematic aspectsand commit to creating something new.

#### ADOPT EQUITY-MINDED LANGUAGE

Common uses of language are constantly changing. Sometimes the changes are stylistic, as in the way that, over time, different words have been used to describe something that's very good (e.g., bad, phat). Some of these changes are powerful responses to self-determination or changes in political consciousness (e.g., Negro to Black to African-American). Some are the result of seeking to eradicate offensive or oppressive metaphors and references (e.g., dropping the term "off the reservation").

Use language that helps people understand your goals and see your vision. You'll find tools in the workbook that offer specific guidance. Be sure that people understand the problems you're trying to address (e.g., racism, other -ism's and exclusion) in terms that are clear without watering down your message. You'll find tools in the "Build Shared Language and Analysis" section of the toolkit to support you with key terms.



#### Tools in the workbook to support this section:

Tool: A Style Guide—Harnessing Language 





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## **UNITED WAY OF CENTRAL CAROLINA**

Charlotte, NC-POP1 (More than 1M Individuals Served)



United Way of Central Carolinas (UWCC) initiated Unite Charlotte to provide program and organizational support to grassroots community organizations that address the region's economic mobility challenges through racial equity and social justice focused work. The initiative was launched in response to community unrest related to the death of Keith Lamont Scott by a local police officer in 2016. Just after the shooting, local businesses and individuals rallied together to raise over \$400,000 for one-time, immediate support of grassroots work that focused on racial equity, economic mobility and social capital, administered through UWCC. Through a diverse committee of funders and community members, twenty grants were awarded, along with several capacity building trainings. UWCC has continued this work in 2018 and awarded another \$400,000 in grants. Unite Charlotte also serves as a streamlined opportunity for grassroots organizations to access UWCC funding support. Organizations can apply individually or through a fiscal sponsor for smaller grant amounts, without the rigorous certification requirements that are a part of the Impact Grant process. UWCC has also developed their own capacitybuilding trainings for grantees and other grassroots organizations.

#### CAPACITY BUILDING TRAINING

UWCC has developed a quarterly, free capacity building training series targeting small nonprofits in their five-county region that focus on topics like Nonprofit 101, Grant Writing 101, Program Evaluation, Developing a Fundraising Plan and more. These grants are being facilitated by UWCC staff and community volunteers like consultants, public library staff and professional fundraisers. These trainings have received excellent evaluations that included requests for additional opportunities.

#### **UNITED NEIGHBORHOODS**

A report in 2014 concluded that Charlotte was ranked 50th out of 50 large cities in a nationwide study of upward mobility. United Neighborhoods is one response to these findings. The program is a community-led effort to transform and revitalize underresourced communities by improving the economic mobility of its residents, one neighborhood at a time.

The United Neighborhoods model focuses on long-term partnerships, concentrating resources in select neighborhoods. Beginning in 2017, two inaugural communities were chosen as United Neighborhoods. Since then, each community's residents have participated in an annual Community Visioning Meeting that identified community priorities. Based on those priorities, agencies are invited to apply to a granting process funded by UWCC, with decisions made by a committee of neighborhood stakeholders.







## **UNITED WAY OF CENTRAL MARYLAND**

Baltimore, MD-POP1 (More than 1M Individuals Served)



United Way of Central Maryland (UWCM) is exploring a new framework for serving communities. For over 90 years UWCM has supported communities through programming built by external partners and/or data. Over the year, UWCM has conducted in-person outreach to over 48 neighborhoods to meet local Greater Baltimore residents and co-create solutions to issues effecting the community.

#### THE RACE CARD PROJECT

To facilitate the conversation, UWCM utilized the Race Card Project; a program produced by the Aspen Institute and journalist Michele Norris. The Race Card Project provides an organic framework for understanding what "race" means to each community member. Individuals choose six words to describe what "race" means to them on one side of a postcard and use the other side to tell their own story. The tool helped celebrate what residents shared in common and also what makes them unique.

UWCM also used the Race Card Project to engage over 400 homeless individuals at their annual Project Homeless Connect event. Whether talking with civic leaders or people facing homelessness, we all have identities and stories that can raise awareness and understanding, and United Way is helping people connect with each other in new ways.



## 5. DESIGN PROGRAMS & POLICIES THAT ARE TARGETED & UNIVERSAL

#### In this section, we'll explore how to

**INVOLVE YOUR COMMUNITY** 

**FOLLOW THE DATA** 

UNDERSTAND SYSTEMIC BARRIERS

SET UNIVERSAL GOALS AND DESIGN TARGETED PROGRAMS AND POLICIES

PROGRAM EVALUATION AND CONTINUOUS LEARNING

Equitable outcomes for families and communities don't happen all by themselves. They require a careful understanding of the experience of people who are facing racial and other barriers to their well-being. Make sure you explore and understand the systemic barriers that influence their experiences. Then you can design your programming and policy advocacy in ways that address root causes or drivers of inequities rather than just symptoms. Set universal goals and design your work to target resources and strategies to meet the specific, differentiated needs of specific subgroups.



#### **INVOLVE YOUR COMMUNITY**

Equity is not only about outcomes. It's also about process. One of the most important processes is engaging directly with people in the communities we serve. Whether you're designing a project focused on equity for your staff or a community-level program, make sure you have the right people at the table to define the problems and construct solutions. Identify who is most affected by the issues you're addressing and bring them into decision making. Don't just "engage" your community. Involve them. Trust your community to participate in your work!

Create opportunities for ongoing relationships and meaningful participation in decision making, not just one-off input/listening sessions. Learn from local governments and philanthropies that are implementing participatory budgeting and participatory grantmaking processes. In addition to creating ongoing bodies to engage in decision making, create broad-based opportunities for input and information exchange. While careful, culturally specific outreach methods are important to bringing people into your processes, you'll also want to design "in-reach" methods that involve your team going to where community members are already gathering and engaging people in the course of their daily lives, such as while waiting at a community clinic or hair salon. (Think postcard or online campaign to gather ideas or share information. Enlist community institutions (e.g., houses of worship, businesses, health clinics, schools) as partners in these efforts. Listen more than you talk. Be open to the likelihood that community members will see things differently from your team and from one another. Be sure to allow enough time to build relationships of mutual respect, to explore ideas fully and resolve or otherwise address differences. Remember this African proverb: "If you want to go fast, go alone. If you want to go far, go together."



#### **FOLLOW THE DATA**

Creating more equitable outcomes requires that we first know about inequities within the current outcomes. That requires disaggregating data so that you can see how specific groups are faring currently. Review the types of data you are collecting and your data analysis methods. Do your best to measure things that matter, even if they are hard to measure. Use population level data that is available about your community (e.g., from city government or regional planning agencies). Remember that data collection and data analysis are important opportunities for community engagement. See multiple tools within the Build Equity-Minded Culture, Structures and Systems section of this toolkit for more on building organizational capacity for this kind of engagement with data.



## 5. DESIGN PROGRAMS & POLICIES THAT ARE TARGETED & UNIVERSAL, CONT.



#### **UNDERSTAND SYSTEMIC BARRIERS**

In the Get Ready section of this toolkit, we offer many resources for deepening your understanding of racism and other structural barriers to opportunity. Be sure to explore the historic and current-day manifestations of systemic racism in your community. Whenever you are tempted to "fix the people" (e.g., building skills, changing behaviors, building social capital, etc.), ask yourself what systemic barriers the people are facing and explore how those barriers can be removed or reduced. Often, you'll find that there are ways you can mitigate barriers in the short term (e.g., offering to arrange or reimburse for travel to advisory group meetings if public transit options are inadequate) while working with other partners to remove the barrier in the longer term (e.g., advocating for improvements to the transit system).



#### SET UNIVERSAL GOALS AND DESIGN TARGETED PROGRAMS AND POLICIES

Pursuing racial equity is not simply about ensuring that outcomes are not predictable by race – ensuring that all racial groups are experiencing the same range of outcomes. It also means improving outcomes for the entire community. As example, let's say that your high school graduation rates are 75% on average, with White and some Asian students graduating at higher rates than Black, Latinx, Indigenous and some other Asian students graduating at lower rates. Getting all groups to 75% is not the end game, because you'd want to see higher graduation rates for all groups, say in the mid 90%s. Let core community values (e.g., fairness, opportunity, etc.) and shared visions (e.g., for a community where everyone can meet their needs, pursue their dreams and contribute to the common good) guide you in establishing such universal goals.

Once you've established a universal goal, use your understanding of the systemic barriers to identify strategies for change that you can translate into programming and policy advocacy. Develop programs and policies to remove barriers to graduation for each subgroup, noting that those programs and policies may look different for different groups. And, you'll need to target resources to focus on the groups facing the greatest barriers.



#### PROGRAM EVALUATION AND CONTINUOUS LEARNING

As you design and redesign your programming, be sure to build in ways to track your progress. Work with your stakeholders to identify what you will measure (metrics) and how much progress you want to see (goals or objectives) to track success. Be sure to identify metrics to track outcomes for participating individuals, families, or communities, as well as the success of your relationships and your processes. Build in manageable ways to collect and analyze this data in order to support continuous improvement. Use specific equity-focused assessment tools, like a Racial Equity Impact Assessment, to discern ways that specific programs and policies affect different racial groups.

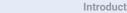
In addition to the mechanics of collecting, analyzing and applying that analysis to future actions, you'll want to cultivate a culture of learning across your organization. The more that staff, volunteers, participants and partners can learn, share actionable feedback, acknowledge mistakes and make real-time decisions in an atmosphere free from blame and shame, the more likely your evaluation efforts will lead to greater effectiveness. See multiple tools within the Build Equity-Minded Culture, Structures and Systems section of this toolkit for more on building organizational capacity for ongoing learning.



#### Tools in the workbook to support this section:

Fool: Introductory Questions for Program Design and Evaluation165	Tool: Applying Targeted Universalism	168
Fool: Systems Analysis Guide	Tool: Racial Equity Impact Assessment	169
Fool: A Guide to Developing Racially Equitable Solutions	Tools for a Deeper Dive	170





Part Two: Practice Equity Daily





## **WORKBOOK OVERVIEW**

Like the Practice Guide, this Workbook is organized in two parts. This section features tools, templates, worksheets and resources to support you at each step of your journey.



The tools in this section will guide you as you prepare yourself and invest careful thought into developing your race, equity and inclusion efforts. The organizing framework for this section comes to us from the Interaction Institute for Social Change.







1. Ground the Case for Change in your Mission and Values	11
Tool: Making the Case for Change Worksheet	
Tool: Color-blind to Equity-focused: An Initial Organizational Assessment	
Tool: Talking About Race Toolkit: Affirm, Counter, Transform	
Tool: Four Building Blocks of Change	
Tools for a Deeper Dive	
2. Build your Team and Map out your Process	
Tool: Sample Team Structure	
Tool: Sample Race, Equity and Inclusion Strategy Team Charter	
Tool: Sample Meeting Topics to Map Out Your Process	
Tool: Team Development Cycle	
Tool: Stakeholder Analysis and Engagement Worksheet	
Tool: Designing Your Pathway to Action Worksheet	
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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

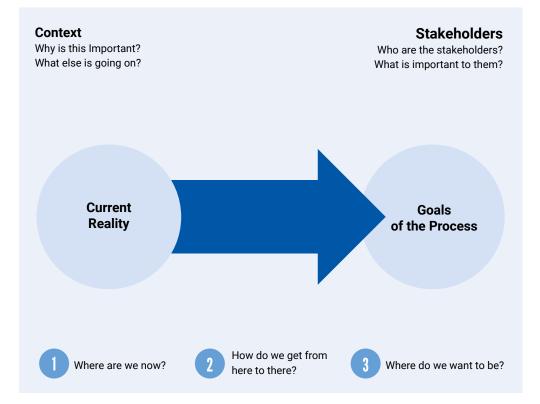
### **QUESTIONS TO EXPLORE**

#### 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			







Part Two: Practice Equity Daily







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

# 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		







Part Two: Practice Equity Daily





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

# MAKING THE CASE FOR CHANGE WORKSHEET, CONT.

STAKEHOLDERS	WINS AND MINDSETS



Part Two: Practice Equity Daily







# Part One: Get Ready > 1. Ground the case for change in your mission and values. MAKING THE CASE FOR CHANGE WORKSHEET, CONT.

#### **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?

Notes		





Part Two: Practice Equity Daily







# Part One: Get Ready > 1. Ground the case for change in your mission and values. MAKING THE CASE FOR CHANGE WORKSHEET, CONT.

#### 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?

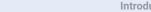
Notes			

#### 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?

Notes	





**Part Two: Practice Equity Daily** 







# Part One: Get Ready > 1. Ground the case for change in your mission and values. MAKING THE CASE FOR CHANGE WORKSHEET, CONT.

#### 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





Part Two: Practice Equity Daily





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

# COLOR-BLIND TO EQUITY-FOCUSED: AN INITIAL ORGANIZATIONAL ASSESSMENT<sup>17</sup>

This is an assessment you can make in just a few minutes to get an initial sense of where your United Way is on a spectrum from being color-blind to being equity-focused. You can also use this assessment with your team to build a clearer collective snapshot of where your organization is on its learning journey. Once you have an interpretation of your results, you can select tools in this toolkit to support your next steps.

This is an assessment you can make in just a few minutes to get an initial sense of where your United Way is on a spectrum from being color-blind to being equity-focused. You can also use this assessment with your team to build a clearer collective snapshot of where your organization is on its learning journey. Once you have an interpretation of your results, you can select tools in this toolkit to support your next steps.

#### **Section A Section B Section C Section D** My organization My organization My organization My organization ☐ Has some recognition that expanding □ Understands and communicates that □ Does not collect, break out, or ☐ Does not collect, break out, or analyze opportunity and closing racial gaps are data by race/ethnicity in programs or reducing racial inequities is missionanalyze data by race/ethnicity in critical. important to its work. programming. operations. ☐ Collects, breaks out, and analyzes □ Collects and breaks out data by race/ Proposes strategies that are ☐ Proposes strategies that are data by race/ethnicity in programs ethnicity in programming but is not presumed to work for all children. presumed to work for everyone. and operations. sure what to do with it. □ Looks for staff, consultants, ☐ Presumes that all staff can work with ☐ Proposes strategies that have been ☐ Has gone through trainings about race and vendors with racial/ethnic all groups. processed through a racial impact but is unclear about what to do next. backgrounds similar to the ☐ Does not see diversity as an important analysis. community. □ Needs a better understanding of organizational consideration. □ Values diversity and inquires about the distinctions between equity and ☐ Sees diversity as an important ☐ Believes that lifting up issues of race/ the cultural competence of staff to diversity/inclusion. organizational consideration. ethnicity will only create conflict. work with diverse groups. ☐ Has no mechanisms for management ☐ Has accountability mechanisms ☐ Has no accountability mechanisms accountability around equity, diversity ☐ Has mechanisms for management around diversity and inclusion, but not around equity, diversity and inclusion. and inclusion. accountability around racial equity, around equity. diversity and inclusion. □ Discourages the formation of internal ☐ Has no mechanisms for staff ☐ Offers cultural competence training groups to focus on race/ethnicity. ☐ Has mechanisms for staff accountability around equity, diversity and opportunities for cross-cultural accountability around racial equity, and inclusion. conversations and learning. diversity and inclusion. ☐ Has an internal group working ☐ Supports the efforts of internal groups ☐ Supports the efforts of internal groups on issues of equity, diversity and to work on issues of diversity and to work on issues of equity, diversity inclusion. inclusion. and inclusion. In Section A, I checked \_ In Section B, I checked \_\_ In Section C, I checked \_\_\_\_\_ In Section D, I checked \_ boxes boxes









# Part One: Get Ready > 1. Ground the case for change in your mission and values. COLOR-BLIND TO EQUITY-FOCUSED: AN INITIAL ORGANIZATIONAL ASSESSMENT, CONT. 17

Color-Blind	Diversity-only	Race-tentative	Equity-focused	
Section D	Section C	Section B	Section A	

#### **Interpreting your results**

Underneath the section where you have the most checks, see how your organization may be characterized.

If the most checks are in Section D, your organization may be characterized as "Color-blind." An intentional focus on race is likely to improve your organizational results.

If the most checks are in **Section C**, your organization may be characterized as "Diversity-only." Congratulations on your work on diversity. Move next to a focus on equity.

If the most checks are in Section B, your organization may be characterized as "Race-tentative." You've made a start, so accelerate your work.

If the most checks are in Section A, your organization may be characterized as "Equity-focused." We also hope you'll share your lessons and best practices with others. Be sure to put policies in place that can sustain the work.













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

# TALKING ABOUT RACE TOOLKIT: AFFIRM, COUNTER, TRANSFORM<sup>18</sup>

The Center for Social Inclusion (CSI) is committed to advancing racial equity. We work to transform structural inequity and exclusion into structural fairness and inclusion. The Talking About Race Toolkit is part of our communications strategy to 1) reframe the conversation on race and 2) move us toward policy solutions that work for everyone.

#### What is the Talking About Race Right Toolkit?

To advance racial equity, we have to be able to talk about race. Too often, we avoid the topic of race, which means we perpetuate inequitable outcomes. Other times, when race is talked about without an equity strategy, implicit bias is triggered and inequities are exacerbated. How we talk about race matters.

The good news is there's a useful field of practice to inform effective communications about race. This toolkit is a collection of the key strategies we've found are necessary to combat the race wedge and advance racial equity. Effectively talking about race is an essential skill and we believe this approach can help a variety of stakeholders effectively discuss race and policy.

#### How should this toolkit be used?

This is a guide for your own strategic messaging. Please use the worksheet as a medium to try out your own messaging ideas and refer to the glossary at end for definitions. This toolkit contains critical strategies that advocates can use to fight the race wedge frame- but with a caveat that each of these messages must be customized based on issue, audience, and the intention of the message.

#### When should this toolkit be used?

This toolkit should be used not only for winning critical policy fights, but also for the bigger goal of changing our narrative on race. We've tested on issues of healthcare, subprime lending, immigration, and fiscal policies, and firmly believe that the following strategies can apply to a broad variety of issues. Using our strategies together with multiple research-based messages can help bring about more racially equitable results. It's not enough to talk about race. We must act on new solutions.

This toolkit is based on more than five years of research and collaboration with leading experts in the fields of messaging, framing, and implicit bias. For a copy of our latest report on message testing, please visit our website at www.centerforsocialinclusion.org.

Learn more about our work at www.centerforsocialinclusion.org. Facebook.com/centerforsocialinclusion Twitter @theCSI

#### **Talking About Race Guide**

Notes

To effectively move someone to support racial justice or policy reform, review the following points:

- · Use images and words in a story format rather than just presenting data.
- · Consider what your most important outcomes are and ask yourself whether there are universal values that people can agree on.
- There is no silver bullet. Not all messages work in all contexts or on all issues.
- · Message order matters—a lot! The following framework orders the conversation in a way that's engaging and persuasive. Our framework is Affirm, Counter, and Transform (ACT).







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

# TALKING ABOUT RACE TOOLKIT: AFFIRM, COUNTER, TRANSFORM<sup>18</sup>

## **AFFIRM**

## COUNTER

## **TRANSFORM**

#### **Affirm**

Start off the dialogue by mentioning phrases and images that hook and engage your audience. The key is to speak to their values.

#### Start with the Heart

Start your message with an emotional connector to engage your audience in the message (e.g., "we work hard to support our families" and "all our contributions help make America great.")

#### Explain why we're all in this Together

Describe "shared fate" in racially explicit terms (e.g., it hurts the same to lose a home or job, whether you're White or Black, male or female, a single parent or a twoparent family...)

#### COUNTER

Introduce and lead a discussion of race with a brief snapshot of the historical context. Open your audience's minds to deeper explanations about racial inequities.

#### Explain why we have the Problem

Briefly outline what has happened in the past and why we have a problem today (e.g., public dollars for schools, bus service, health care, job creation).

#### Take on Race Directly

Confront the race wedge by declaring it and dismissing it by naming institutional opportunities and actions (e.g., this is not about immigrants or welfare, it's about whether Americans will see their children off to college).

#### **TRANSFORM**

Leave the audience with an engaging solution. Present an action item so they're committed and feel like they're moving forward.

#### Reframe "Makers" and "Takers"

Change and redefine who the real good guys and bad guys are in this fight (e.g., while oil company and bank CEOs are getting richer, some are laying off workers and fighting for tax loopholes instead of investing in our nation's future ...)

#### End with Heart

Present solutions in emotional terms (e.g., corporations can and should do their fair share so we the people can invest in schools, healthcare, transit, and services that help us all have a bright future).









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

# TALKING ABOUT RACE TOOLKIT: AFFIRM, COUNTER, TRANSFORM<sup>18</sup>

Introduction

#### **Talking About Race Worksheet**

Consider the following questions as you brainstorm and design your own messages on racial equity.

#### **Context Questions:**

- What are the policy issues you're working on (e.g., immigration reform, public transportation)?
- Who's the target audience you're trying to talk to (e.g., White swing voters)?
- What geographic area are you focusing on (e.g., Los Angeles, the state of Michigan)?
- What medium are you using to relay the message (e.g., video, presentation, flyers)?

#### Affirm:

- · Start with the heart. What speaks to your audience? What group of people do they identify with the most (e.g., working class)?
- · Explain why we are all in this together.
- What identity could link your audience and the issue you're addressing (e.g., parenthood)?

#### Counter:

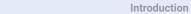
- · Take on race directly.
- · Explain why we have the problem. What's the social, political, and historical context of the issue you're working on (e.g., population, demographic changes, and redistricting for immigration reform look)?
- · What keywords are being used in the public debate about the issue you're working on (e.g., immigration reform, security, jobs, Americans)?
- What words and images are codes or metaphors for race (e.g., welfare queen, inner city, foreigners)?

#### Transform:

- · Reframe "makers" and "takers."
- Who are the main players in the issue? How have people of color been depicted in it?
- · Recycle the words you used in the beginning of your message.
- Leave your audience with 1–2 action items for the issue at hand (e.g., re-invest in safety net programs).
- · How are these action items benefitting everyone?
- · End with heart and solution.

#### Try it out with a partner! (3 minutes/6 sentences max)

Notes		



Part Two: Practice Equity Daily





# Part One: Get Ready > 1. Ground the case for change in your mission and values. TALKING ABOUT RACE TOOLKIT: AFFIRM, COUNTER, TRANSFORM<sup>18</sup>

#### **Talking About Race Glossary**

#### Dog whistle racism:

Political campaigning or policy-making that uses coded words and themes to appeal to consciously or subconsciously racist concepts and frames. Sometimes referred to as "strategic racism."

#### Framing:

Unconscious thought process consisting of networks of associations that we use to interpret information. Frames are used as a long-term strategy in changing perceptions (e.g., individual responsibility).

#### Implicit bias:

Unconscious attitudes and stereotypes targeting individuals and social groups that "affect our understanding, actions, and decisions" (adapted from Kirwan Institute).

#### Individual racism:

Pre-judgement, bias, or discrimination by an individual based on race.

#### Institutional racism:

Policies, practices, and procedures that work better for White people than Black, Indigenous and other people of color, regardless of intention.

#### Messaging:

Re-packaging arguments using engaging and persuasive language.

#### Race wedge:

The process of using race strategically as a tactic to divide people in order to achieve a political outcome (e.g., welfare queen language).

#### Racial equity:

When race is no longer a determinant because socioeconomic outcomes have improved for all groups. It's an inclusive approach to transforming structures to guarantee access, justice, selfdetermination, redistribution, and sharing of power and resources. Racial equity is our lens and the outcome we seek to achieve.

#### Structural racism:

A history and current reality of institutional racism across all institutions. This combines to create a system that negatively impacts communities of color.

#### <sup>18</sup>Source: Talking About Race: Affirm-Counter-Transform, Center for Social Inclusion. Reprinted with permission.

#### The Center for Social Inclusion is available for communications testing trainings that include these strategies and facilitated conversations on how to customize your own message.

#### **Resources Relevant to Message Development**

- Asian Americans on Sunday Shoes; What They Talk About When They Talk About Us. ChangeLab
- Dog Whistle Politics Ian Haney López
- Winning Words for Closing the Racial Wealth Gap Insight Center for Community Economic Development
- State of the Science: Implicit Bias Review 2015 Kirwan Institute
- Transforming Perception: Black Men and Boys Perception Institute
- Visions, Values, and Voice: A Communications Toolkit Opportunity Agenda
- · Getting Equity Advocacy Results (GEAR) Toolkit PolicyLink
- Moving the Race Conversation Forward Race Forward

Notes			





Introduction

Part One: Get Ready

Part Two: Practice Equity Daily





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

## FOUR BUILDING BLOCKS OF CHANGE

Change management teaches us that people are more likely to make and sustain a change if they can see themselves in the new future and have concrete models to follow as they shift behaviors and build new skills. Use this guide from the McKinsey Quarterly<sup>19</sup> as you invite colleagues and fellow advocates to share your focus on race, equity and inclusion work.

> "I will change my mind-set and behavior if..."

#### Why it works

People mimic individuals and groups who surround them sometimes consciously, and sometimes unconsciously.

#### **Role Modeling**

"I see my leaders, colleagues, and staff behaving differently."

"I understand what is being asked of me,

#### **Fostering** understanding and conviction

and it makes sense"

#### **Developing** talent and skills

"I have the skills and opportunities to behave in the new way."

#### Reinforcing with formal mechanism

"I understand what is being asked of me, and it makes sense"

#### Why it works

People seek congruence between their beliefs and actions - believing in the "why" inspires them to behave in support of a change.

#### Why it works

People mimic individuals and groups who surround them sometimes consciously, and sometimes unconsciously.

#### Why it works

Associations and consequences shape behavior - through all too often organizations reinforce the wrong things.











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

# **TOOLS FOR A DEEPER DIVE**

#### Making the Case

#### **Business Case for Racial Equity: A Strategy for Growth**

#### W. K. Kellogg Foundation and Altarum

This report explores the new workforce majority, the economic upside of racial equity and specific domains of opportunity, including housing, education, health, criminal justice, employment and entrepreneurship. It concludes with a 12-point action agenda for leaders in every sector.

#### Collectively We Rise: The Business Case for Economic Inclusion in Baltimore

#### **Baltimore Integration Partnership**

Exploring the Baltimore experience, this report dissects why businesses of every size should "adopt economic inclusion practices as part of its standard business approach." It debunks the myth that inclusion practices lead to higher costs or lower quality and discusses the importance of community and regional partnerships. The report closes with recommendations for businesses and anchor institutions.

#### **The Competitive Advantage of Racial Equity**

#### Policy Link and FSG

This report offers business leaders guidance on "how to improve a company's economic performance by advancing racial equity." It focuses on three related elements: reconceiving products and markets, redefining productivity in the value chain and strengthening the business context.

#### **Equity: The Superior Growth Model, Executive Summary**

#### Policy Link

This report makes a broader case on why equity is important to the health of the economy.

#### Social Service and Social Change: A Process Guide

#### **Building Movement Project**

A practical guide on engaging in broader social change work, this resource supports leaders of nonprofit organizations that provide social services. It explores the relationship between their day-to-day service delivery and the underlying issues that drive the need for their services.

#### Which Two Heads Are Better than One: How Diverse Teams Create Breakthrough Ideas and Make Smarter Decisions

#### Juliet Bourke

This book highlights organizational research on the power of diversity and offers quidance for leaders to "create genuinely diverse thinking groups, engage in more productive conversations, and make wiser judgements."









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

# TOOLS FOR A DEEPER DIVE, CONT.

#### Communicating about Race, Equity and Opportunity

#### **American Opportunity: A Communications Toolkit**

Opportunity Agenda with the Spin Project

This three-part toolkit gives in-depth guidance for building the will to expand opportunity for all. Part One offers a summary of findings from The State of Opportunity report and describes an opportunity for all. nity-centered case for change. Part Two is full of concrete communications tools to guide you in creating your own messaging and spokespeople for a variety of audiences. Part Three focuses on how opportunity framing can be applied to specific issue areas.

#### **Building a Message: A Social Justice Communications Toolkit**

Opportunity Agenda

Designed to help improve your messaging, this resource features sections on strategy, audience and research as well as examples from the field.

#### Calling In: A Quick Guide on When and How

everyday feminism

This quick article explains the difference between "calling someone out" and "calling them in" when a person does or says something oppressive. It offers practical steps for when and how to effectively do it.

#### It's Time to Talk: How to Start Conversations About Racial Inequities

Annie E. Casey Foundation

"This report tells how KIDS COUNT advocates in Nebraska, Wisconsin, and Washington used solid data, leadership, and citizen engagement to spur race-based legislation and community change. It is the first installment in the five-part Race for Results Case Study series, which explores the intersection of kids, race, and opportunity in America."

#### **Moving the Race Conversation Forward**

Race Forward

Part One of this report offers a detailed content analysis of the ways race and racism are covered in the media and outlines seven common but harmful practices in the conversation about race and racism. Part Two shares case studies of efforts to intervene in the public conversation and related impacts on public policy.

#### Ten Lessons for Talking about Race, Racism, and Racial Justice and the Social Justice Phrase Guide

Opportunity Agenda

These resources also provide practical guidelines for how to talk and write about race, racism and social justice.

#### **Under Our Skin**

The Seattle Times

This set of twelve videos (four to seven minutes each) feature reflections on key concepts such as diversity, institutional racism and political correctness, and can serve as useful discussion starters on those topics.

#### Winning Words for Closing the Racial Wealth Gap: A Style Guide

Insight Center for Community Economic Development and ASO Communications

This brief guide outlines specific dos and don'ts for talking about racial wealth inequities.





## **SAMPLE TEAM STRUCTURE**

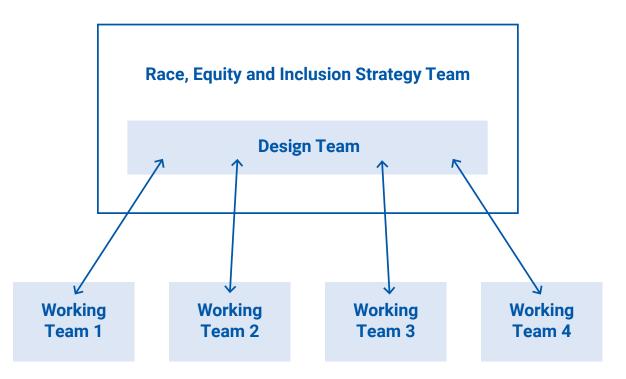
A Race, Equity and Inclusion Strategy Team typically includes a range of stakeholders and takes responsibility for the content of the work, such as which inequities do we want to focus on? What are our strategies? What are our goals and plan of action? Who will we partner with to implement our plan?

Depending on the size of your team, you may also want to ask a subset to serve as the Design Team, which makes decisions about process. What learning and planning activities will we design? Who will be involved? How long will the process take? What internal and external resources will we need? For individual meetings, what are the desired outcomes and agenda?

You might also need to establish Working Teams to take on specific tasks (e.g., organizing a town hall meeting, researching a specific issue and promising strategies for addressing it).

#### **Example:**

Introduction



#### **Composition for each Working Team**

- · Community Co-Lead
- · Resident Co-Lead
- Facilitator
- · Design Team Member
- · Staff Person
- · Team Member

#### **Team Roles**

- · Race, Equity and Inclusion Strategy Team: Make critical decisions about plans.
- Working Teams: Establish outcomes and develop strategy recommendations for improving results in their area of focus.
- **Design Team:** Maintains the integrity of the planning process and organizes information for Planning Team decision making.







# 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

Part Two: Practice Equity Daily

- · 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)

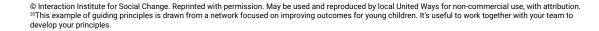
- Focus during planning and learning phase:
- · Design agendas for specific meetings, workshops, planning sessions, etc.
- · Ensure that events are implemented as planned
- · Make mid-course corrections to activities based on real-time learning and feedback
- · Plan development and decision making
- · 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





# 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.

# Values Service Authenticity Love Receptive & Flexible

#### **Attributes**

#### Collaborative

- Creates opportunities for people to work together 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 nondefensive way.
- Adjusts plans to meet changing needs.
- Models collaborative behaviors.

#### **Values**

#### Service

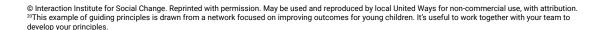
- · Works for or assists.
- Focuses on the interests and needs of others.
- Builds relationships based on equality, humility, and mutuality.

#### **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.







Part Two: Practice Equity Daily







# 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 guestions 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





Introduction Part One: Get Ready

Part Two: Practice Equity Daily







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





Part Two: Practice Equity Daily







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

  - 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









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

  - > Sequence of phases and milestones for each phase

  - Documentation processes
  - Deportunities 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**

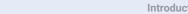
#### **Desired outcomes**

- · 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









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

# **TEAM DEVELOPMENT CYCLE**

During the course of your work with the Race, Equity and Inclusion Strategy Team, you're likely to encounter common questions and group dynamics. On any team, members will experience the need for inclusion, control and openness. When race, equity and inclusion are the focus of a team's work, these general group dynamics are further complicated by racism, sexism and other systems of oppression. Be sure you have a plan for engaging with these questions and group dynamics to set the foundation for productive teamwork. And be sure to get help from an informal peer coach or a formal contracted consultant to help you plan for and address these kinds of dynamics.

	Inclusion (Identity, Dependence)	Control (Influence, autonomy)	Openness (Intimacy, Affection)
Questions Faced/Asked by the Team	<ul> <li>Why am I here? Do I belong? Will I have to relinquish something about myself to belong here?</li> <li>How much do I matter to others and how much do they matter to me?</li> <li>What roles are the members of the team going to take?</li> </ul>	<ul> <li>How competent do I feel compared to others in the team?</li> <li>What is my realm of influence?</li> <li>Will others recognize my contributions? Will I be able to make my voice heard?</li> <li>Who has clout in the group and why?</li> <li>How could racism or other -isms play out on this team?</li> </ul>	<ul> <li>Am I liked by team members? Do I like the team?</li> <li>Will they accept not only my strengths but also my weaknesses?</li> <li>Can they genuinely understand and engage with my perspectives?</li> <li>Can I trust these team members? Do they trust me?</li> <li>Do I feel safe enough to offer feedback? Do I trust that their feedback is coming from a caring place?</li> </ul>
Group Dynamics Characterized By:	<ul> <li>A need to define the boundaries and scope of the task.</li> <li>The tension of wanting to belong to the team while also remaining an individual player.</li> <li>The creation of a group identity.</li> </ul>	<ul> <li>A need to exercise personal influence within the team.</li> <li>The tension between exerting influence by speaking up in the team vs. withholding information by not speaking up.</li> <li>A "bumping up" against each other resulting in interpersonal struggles and conflict as well as enhanced creativity.</li> </ul>	<ul> <li>A need for alignment and harmony on the team.</li> <li>The tension of wanting intimacy and connection, yet not having enough trust to be open and vulnerable.</li> <li>Feedback that's increasingly more authentic and truthful, which builds trust and openness.</li> </ul>





# Part One: Get Ready > 2. Build your team and map out your process. STAKEHOLDER ANALYSIS AND ENGAGEMENT WORKSHEET<sup>21</sup>

Collaborative change processes depend on maximum appropriate stakeholder involvement to create robust, collectively owned plans and the network of relationships necessary to implement change. Stakeholder analysis is a disciplined thought process that considers who to involve and how to involve them to enrich the thinking, strengthen the network and achieve collective impact. This is important because stakeholder analysis creates an initial understanding of key issues and sets the foundation to deal with people's concerns and tap their expertise in proactive ways that build agreement.

Involvement from stakeholders is best when it's proactively facilitated by a Race, Equity and Inclusion Strategy Team at the beginning of its change process. The stakeholder analysis helps identify issues and clarify perceptions about who needs to be included in the change effort and why.

In the Making the Case for Change tool earlier in this workbook, you identified stakeholders and wins. Now use this worksheet to record your team's detailed thinking about your stakeholders so you can plan how to engage them in the process. Then decide together how to test your thinking with some of your stakeholders. The examples in this toolkit focus primarily on your staff and board, but this worksheet can also be used to think through engagement with external stakeholders including community leaders, neighborhood residents and business leaders. Some of the engagement ideas will be more appropriate to community change work.

#### **INSTRUCTIONS:**

#### **Column A: Key Stakeholders**

Begin by listing individuals and groups who are important stakeholders for the change you want to make. A stakeholder is any person (or group of people) who:

- Is likely to be impacted by the outcome of the decision
- · Voices unheard or marginalized perspectives
- · Functions as a connector in or across sector(s)/field(s)
- · Is in a position to implement the decision
- · Is in a position to prevent it from being implemented
- · Has relevant information or expertise
- · Has informal influence without authority
- · Is responsible for the final decision

#### Column B: Support

Indicate each stakeholder's current level of support for the changes.

- + = SUPPORTIVE
- 0 = NEUTRAL
- = OPPOSED
- ? = UNKNOWN

#### Column C: Issues, Wins, Mindset

Identify issues that are important to each stakeholder/stakeholder group.

- What would a win/good outcome be from their point of view?
- · What would influence them to support the change effort? What do they need in order to support the change effort?
- · What else might be drawing their attention and energy at this time?
- · Other notes about their current mindset or concerns

#### **Column D: Engagement Strategies**

Determine how to involve each stakeholder/group. Possible Stakeholder Involvement Strategies could include:

- · Invite them to join the Race, Equity and Inclusion Strategy Team (recruited or volunteer members from a given stakeholder group, thinking well about not relying on a single person to represent a group)
- · Invite them to join a short-term task force or project team (e.g., research or storygathering on a particular topic)
- · Invite them to a one-time focus group/ group discussion
- · Administer a survey
- · Conduct door knocking and one-on-one's
- · Facilitate an oral history/story-sharing project or event
- · Invite them to community meetings/town halls/public forums

- · Invite them to house meetings
- · "In-reach"-engage with stakeholders (either live or through paper surveys or suggestion boxes) while they're participating in their ordinary activities (e.g., at their organizational meetings, in health clinics, waiting at the barber shop, on a visit to local businesses)
- · Engage via social media and other online platforms
- · Ask specific stakeholders to help identify people to participate in any of the above

Note that you might involve a given stakeholder group through multiple strategies (e.g., invite additional staff to join your Race, Equity and Inclusion Strategy Team and administer a survey to the entire staff).









# Part One: Get Ready > 2. Build your team and map out your process. STAKEHOLDER ANALYSIS AND ENGAGEMENT WORKSHEET<sup>21</sup>

A. KEY STAKEHOLDERS	B. SUPPORT	C. ISSUES, WINS, MINDSETS	D. ENGAGEMENT STRATEGIES







## **DESIGNING YOUR PATHWAY TO ACTION WORKSHEET<sup>22</sup>**

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> <li>A multiracial team that's ready and willing to lead the process</li> <li>Trust and initial repair of past harms</li> </ul>	Shared understanding of race, equity and inclusion concepts     Shared understanding of local history and related internal history in your UW	Baseline data on org.     assets and inequities     within your UW (e.g.,     workforce equity,     board/ vendor diersity,     donor engagement)      Analysis of key drivers     and causes	Shared vision of an equitable and inclusive organization	Strategies to improve organizational capacity and produce more equitable outcomes	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



Introduction





# Part One: Get Ready > 2. Build your team and map out your process. DESIGNING YOUR PATHWAY TO ACTION WORKSHEET, CONT.<sup>22</sup>

#### 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.



#### **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.











# Part One: Get Ready > 2. Build your team and map out your process. DESIGNING YOUR PATHWAY TO ACTION WORKSHEET, CONT.<sup>22</sup>



#### **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**

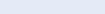
· To support groups of individuals with similar racial identities who are grappling with how racism and white supremacy culture affect their lives and work

#### 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.





Introduction

Part One: Get Ready



# Part One: Get Ready > 2. Build your team and map out your process. DESIGNING YOUR PATHWAY TO ACTION WORKSHEET, CONT.<sup>22</sup>



#### **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.

lotes		







## Part One: Get Ready > 2. Build your team and map out your process. DESIGNING YOUR PATHWAY TO ACTION WORKSHEET, CONT.<sup>22</sup>

Outcomes & Products	A multiracial team that's ready and willing to lead the process     Trust and initial repair of past harms	Shared understanding of race, equity and inclusion concepts Shared understanding of local history and related internal history in your UW	Baseline data on org. assets and inequities within your UW (e.g., workforce equity, board/ vendor diersity, donor engagement) Analysis of key drivers and causes	Shared vision of an equitable and inclusive organization	Strategies to improve organizational capacity and produce more equitable outcomes	Race, equity and inclusion     Action Plan     Processes to monitor     implementation     Processes to assess the     impact of implementation     and apply learnings to future     action
PHASES	TEAM BUILDING	KEY CONCEPTS	PROBLEM ANALYSIS	SHARED VISION	STRATEGIES & SOLUTIONS	ACTION PLANNING & CONTINUOUS IMPROVEMENT
<b>ACTIVITIES BY T</b>	EAM OR STAKEHOLDER O	ROUP				
Race, Equity and Inclusion (REI) Strategy Team	Orientation	<ul><li>Readings</li><li>Workshop</li><li>Racial affinity groups</li></ul>	Organizational     assessment	Working sessions	Working sessions	Working sessions
Working Groups: Workforce Equity Operations Board Development			Working sessions	Working sessions	Working sessions	Working sessions
Staff Engagement		• Workshop	Survey     Discuss at staff meetings	All-staff retreat     (or joint staff/board retreat)	Get feedback on REI Team and Working Group ideas in staff meetings	Get feedback on REI Team and Working Group ideas in staff meetings
Board Engagement		• Workshop	Survey     Discuss at staff meetings	All-staff retreat     (or joint staff/board retreat)	Get feedback on REI Team and Working Group ideas in staff meetings	Get feedback on REI Team and Working Group ideas in staff meetings
ONGOING ACTIV	ITIES					
Racial Affinity Groups	Monthly or bi-monthly affinity	group/peer support and learning s	essions, organized by staff			
Coaching	Peer coaching pairs (begin in	workshops, meet monthly after wo	orkshops)			
Staff Brown-Bag Lunches	Quarterly, organized by staff					
<b>ACTIVITIES WITH</b>	H WHICH TO ALIGN					
Identify and map onto the timeline strategic planning sessions, annual meeting, board meetings, annual cel- ebrations or events, etc.						
TIMELINE	Months 1-3	Months 3-6	Months 7-10	Months 11-14	Months 15-18	Months 19-22





Part Two: Practice Equity Daily





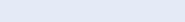
## Part One: Get Ready > 2. Build your team and map out your process. DESIGNING YOUR PATHWAY TO ACTION WORKSHEET, CONT.<sup>22</sup>

#### **Process Map Example**

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

PHASES	TEAM BUILDING	KEY CONCEPTS	PROBLEM ANALYSIS	SHARED VISION	STRATEGIES & SOLUTIONS	ACTION PLANNING & CONTINUOUS IMPROVEMENT
TIMELINE						
Outcomes & Products						
ACTIVITIES BY TEAM	OR STAKEHOLDER GR	OUP				
Race, Equity and Inclusion (REI) Strategy Team						
Working Groups						
Other Stakeholder Engagement						
Staff Engagement						
Board Engagement						











## Part One: Get Ready > 2. Build your team and map out your process. DESIGNING YOUR PATHWAY TO ACTION WORKSHEET, CONT.<sup>22</sup>

Introduction

PHASES	TEAM BUILDING	KEY CONCEPTS	PROBLEM ANALYSIS	SHARED VISION	STRATEGIES & SOLUTIONS	ACTION PLANNING & CONTINUOUS IMPROVEMENT
ONGOING ACTIVITIE	S					
Racial Affinity Groups						
Coaching						
Staff Brown-Bag Lunches						
You could also create a v	isual summary of the infor	mation like the examples	below: Draft Documents	Staff Teams Core Plan	nning Team (small=call), (big=face to	o face) - Stakeholder Convening

#### **DIABETES PREVENTION NETWORK DEVELOPMENT Initial Meeting of Core Planning Team Convene Diabetes Prevention Network Produce Diabetes Prevention Action Plan July-September** Jan-April **April-June Planning Activities and Stakeholder Involvement** Neighborhood 1 4/12 Neighborhood 3 **Outcomes and Deliverables**

**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.

Increased engagement with key diabetes prevention community stakeholders

### 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.

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

#### Document to inform diabetes prevention work through next fiscal year

Increase number of organizations that participate in diabetes prevention programming Increase in resources committed to diabetes prevention programming awareness.





LEARNING

FOR ACTION

**PLANNING** 

**SUPPORTING &** 

RESOURCES

MODELING

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

### **DESIGNING YOUR PATHWAY TO ACTION WORKSHEET, CONT.**<sup>22</sup>

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

Year 1 Year 2 Year 3 Year 4

#### **National**

- · Leadership Team Retreat
- · Equity Core Concepts Workshops (x4)
- · Topical series with HR & Culture Team

#### Network

- Toyota 9 Leadership Team
- Equity Summits (x2)
- · REI sessions at national, regional, local events

#### **National**

- · Equity Core Concepts Workshops (x1); customize for international staff (x1)
- Virtual Core Concepts Workshops (x2)
- Planning Team Training
- REI Leadership Training
- 201 Workshops

· Topical series with HR & Culture Team

#### Network

- · REI session at national, regional, local events
- · Board Development Training
- Equity Summits (x2)

#### **National**

- Engage consulting partner and develop strategy
- Charter REI Planning Team & identity possible activities
- Facilitate collaboration across National Office teams

#### **National**

- Expand REI Planning Team
- Support REI Planning Team to develop REI Action Plans
- EMT and SLT develop REI goals
- REI-informed materials &

 Expand collaboration among National Office teams

#### **Network**

 Support Equity Champions to develope REI Action Plans for their local sites

#### **National**

- Brief National Office leadership and identify opportunities for leaders to promote the initiative
- Coach and support key leaders

#### **Network**

- · Identify and lift up best practice in local sites

#### **National**

- · Coach and support key leaders
- · Cultivate relationships with non-profits & partners

#### **Network**

- · Recruit 45 Equity Champions
- · Cultivate relationships with non-profits & partners
- Support communities of practice

#### **National**

- · Develop Race, Equity, and **Inclusion Toolkit**
- Diverse internship program
- · Secure funding
- Support National Office teams to move REI work forward

#### **Network**

- · Develop Race, Equity, and **Inclusion Toolkit**
- · On-site or virtual technical assistance to local sites

#### **National**

- · Disseminate Race, Equity, and Inclusion Toolkit
- · Identify best practices among National Office teams
- · Diverse intern program
- Secure funding
- · Engage regional capacity building
- · Support National Office teams to move REI work foward

#### **Network**

- Disseminate Race, Equity, and Inclusion Toolkit
- Additional tools and resources
- Identify additional best practice local sales
- On-site or virtual technical assistance t o local sites
- · Online platforms & virtual tools

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





Introduction

Part One: Get Ready

Part Two: Practice Equity Daily







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

### **TOOLS FOR A DEEPER DIVE**

#### **How Can We Create an Inclusive and Equitable Planning Process?**

MP Associates

This tip sheet offers practical reminders about ways to design your processes, decision making and accountability for equity.

#### Racial Identity Caucusing: A Strategy for Building Anti-Racist Collectives

Crossroads Anti-racism

This article is a good place to begin thinking about how and why to establish racial identity caucuses or affinity groups. In addition, RacialEquityTools.org contains a Racial Affinity Group Resources section, including a collection of additional articles and guidelines for creating and facilitating affinity groups or caucuses.

#### **Deploying AECF's Race Equity Framework in Its Civic Sites**

This case study shares how the Annie E. Casey Foundation planned and facilitated racial equity work in Baltimore and Atlanta, which are communities where its offices are located.

#### **8 Ways People of Color are Tokenized in Nonprofits**

Helen Kim Ho

Use this brief article to initially assess if your organization tokenizes Black, Indigenous and other people of color .

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



See also, Workbook Part Two, Step One for key learning resources (e.g., videos, online curricula).





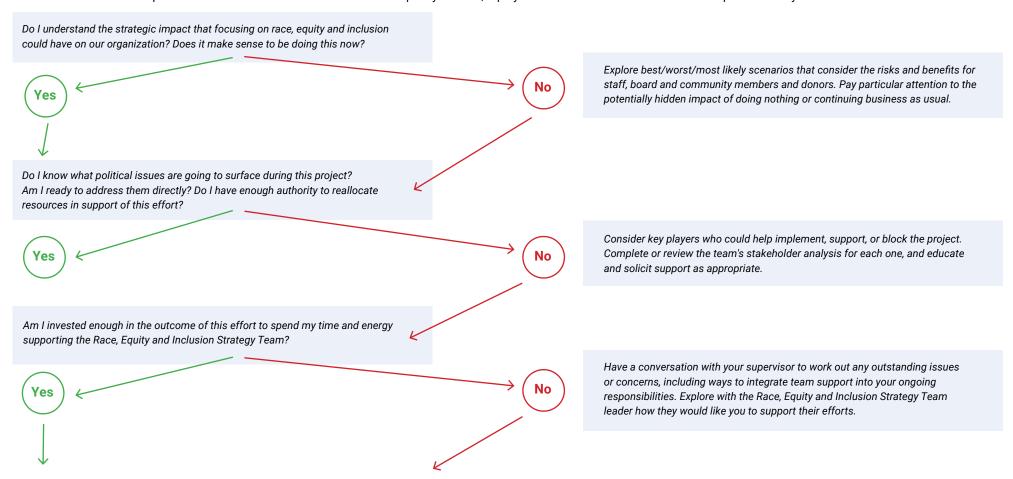
Part One: Get Ready > 3. Bring champions together and launch your process.

### PREPARING SENIOR LEADERS TO CHAMPION THE EFFORT

"Upwards of 50% of the teams formed [in organizations and companies] don't meet their potential. You can't take success for granted." —Jonathan Cox, Center for the Study of Work Teams

One important resource for team success is having champions in senior leadership who are clear about their role and willing to play it effectively. Although senior leaders can't move the work forward alone, they typically play an important part in securing resources, protecting the effort from opponents and setting the team up for success. They need to find the delicate balance between not leaning too far in (micromanaging) and not leaning too far back (leaving your team and its leader to fend for themselves).

This assessment will help senior leaders assess their readiness to champion your race, equity and inclusion efforts. Here are some questions they can ask themselves.



Great! You're ready to hear about the support the team needs from you throughout the process (not just the beginning)!





Part Two: Practice Equity Daily







Part One: Get Ready > 3. Bring champions together and launch your process

### DESIGNING EFFECTIVE MEETINGS-SET UP, SAMPLE AGENDA AND SUGGESTED MEETING NORMS<sup>23</sup>

A race, equity and inclusion planning process is built on a series of meetings. When you organize meetings that are engaging and focused, they will energize your team and keep them coming back. When you create meetings that allow people to bring their authentic selves and feel like their ideas are valued in ways that are honest, joyful and engaging, you're modeling what equity actually looks like day to day. Changing the way your meetings operate can be a powerful way to support a more equity-minded organizational culture.

#### IN THIS TOOL WE OFFER:

#### **Five Elements of Agenda Design**

These elements will support your preparation to maximize the relevance and effectiveness of each meeting.

#### **A Sample Agenda Template**

This sample illustrates how the elements of agenda design are reflected in a single meeting.

#### **Suggested Meeting Norms**

In all meetings—particularly those focused on race, equity and inclusion—norms help to set a productive tone and create a container within which the group can work through challenging discussions.

Notes			





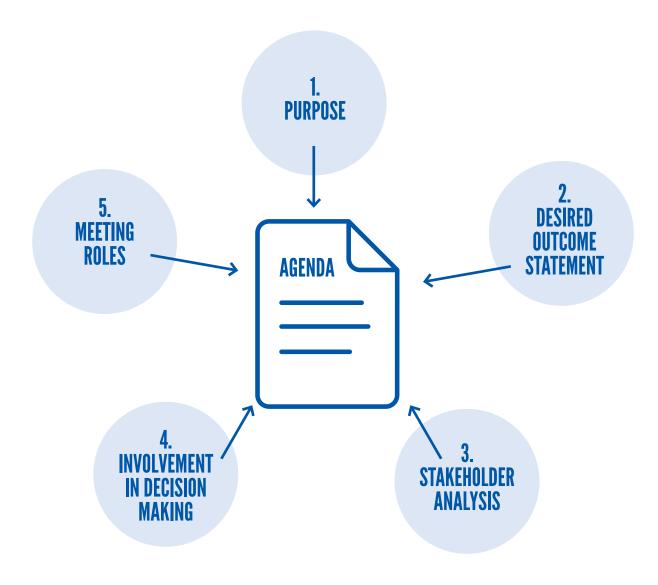


Part One: Get Ready > 3. Bring champions together and launch your process

### DESIGNING EFFECTIVE MEETINGS—SET UP, SAMPLE AGENDA AND SUGGESTED MEETING NORMS<sup>23</sup>

#### **SETTING UP YOUR MEETINGS FOR SUCCESS<sup>24</sup>**

As you and your team prepare meeting agendas, consider these five areas.







Part Two: Practice Equity Daily







## Part One: Get Ready > 3. Bring champions together and launch your process DESIGNING EFFECTIVE MEETINGS—SET UP, SAMPLE AGENDA AND SUGGESTED MEETING NORMS, CONT.<sup>23</sup>

SETTING UP YOUR MEETINGS FOR SUCCESS <sup>24</sup>	
Purpose	Examples Include:
Why are we meeting?	Hear each other's perspectives and build community
	Celebrate success
	Share information
	Generate options
	Develop recommendations
	Develop a plan
	Make decisions
	Track process as plans are implemented
Desired Outcome Statement	Examples Include:
What are the specific outcomes this meeting aims to achieve?	Share understanding of XYZ so we can do ABC
	Prioritize list of options
	Agree on XYZ
Stakeholder Analysis Who has a stake in what will be discussed or decided? How can their interests best be represented in the meeting?	Once you've identified the stakeholders, ask yourself what they would consider to be a good outcome. Then ask yourself if they need to be in the meeting or how they can best inform the conversation (e.g., via survey or focus group before the meeting).
Involvement in Decision Making What level of involvement will participants have in the decision-making process?	First, be clear about who the final decision maker is for each topic the meeting will address. If the meeting participants are not the final decision makers, be clear with them about how the ideas generated in the meeting will inform the final decision. Make conscious choices about whether and how to gather input from absent stakeholders before the meeting begins and/or how to keep them informed after the meeting.
Meeting Roles	Examples include:
Who will play various meeting roles?	Facilitator (focuses on process)
	Team leader (focuses on content/making sure the conversation gets to important outcomes)
	Content manager (takes notes, manages information between meetings)
	Hospitality and logistics
	<ul> <li>Energy watcher (watches for and calls attention to important group dynamics, facilitates ice breakers and energizers)</li> </ul>







Part One: Get Ready > 3. Bring champions together and launch your process

### DESIGNING EFFECTIVE MEETINGS—SET UP, SAMPLE AGENDA AND SUGGESTED MEETING NORMS, CONT.23

#### SAMPLE AGENDA<sup>25</sup>

Once you've answered the five questions for setting up your meeting, this template will help you to create a detailed facilitator's agenda. You may decide to show less detail to meeting participants (e.g., delete the process column).

### **MEETING NAME** LOCATION OR WEB-LINK/CALL-IN INFO

#### **Desired Outcomes**

NOTE: Use these sample prompts to craft your desired outcomes. For each outcome that includes a decision either during the meeting or in the future, be sure to identify the decision maker(s).

#### By the end of the meeting, we will have:

- A shared understanding of \_\_\_\_\_, so that \_\_\_\_\_ Decision making: [NAME] will make the final decision
- An initial set of ideas about (or list of) \_\_\_\_\_ Decision making: [NAME] will make the final decision
- A prioritized list of \_\_\_\_\_ Decision making: [NAME] will make the final decision
- Agreement on \_\_\_\_\_ Decision making: Consensus with fall back to [NAME]
- · Agreement on next steps









## Part One: Get Ready > 3. Bring champions together and launch your process DESIGNING EFFECTIVE MEETINGS—SET UP, SAMPLE AGENDA AND SUGGESTED MEETING NORMS, CONT.<sup>23</sup>

#### **SAMPLE AGENDA**<sup>25</sup>

**Detailed Agenda** 

NOTE: For each desired outcome, identify the topic(s) you'll need to cover, the order in which you'll cover them and process tools to move through each topic.

TOPIC / CONTENT	HOW / PROCESS WE'LL USE	WHO / ROLES	TIME
Opening/Start Ups Welcome and introductions Getting in the room	Round robin/quick go-around     One-word check-in/ reflection question		10 minutes (replace with time on clock e.g., 10-10:10 am)
Roles (e.g., facilitator, time keeper, recorder)	Review     Check for understanding		10 minutes
Desired outcomes Decision making (with fallback) Agenda	Check for agreement		
Norms	<ul><li>Present proposal</li><li>Check for understanding</li><li>Ask for any additions or changes</li><li>Check for agreement</li></ul>		10 minutes
Topic 1			
Topic 2			
Topic 3			
Closers Summarize agreements, check on whether we achieved all of our desired outcomes	Present, check for agreement		
Next steps Planning for any parking lot/garden items that came up during the meeting			
Meeting evaluation	• Plus/Delta		
Close	One-word check-out		







Part One: Get Ready > 3. Bring champions together and launch your process

### DESIGNING EFFECTIVE MEETINGS—SET UP, SAMPLE AGENDA AND SUGGESTED MEETING NORMS, CONT.23

#### SUGGESTED MEETING NORMS

Norms are behaviors that can help to create brave space for learning and planning together. The following norms have been especially useful to us in discussions and workshops focused on equity, diversity and inclusion.

#### Listen deeply

Listen for understanding, not to prepare your rebuttal. Don't interrupt people as they speak. Try to acknowledge what you've just heard the previous person say before you go on to make another point. When you hear something that's different from your own thinking or analysis, accept the speaker's description of their experiences as real for them, even if you haven't experienced or don't understand it.

#### Make "I" statements

Speak from your own experience rather than speaking for others, about others, or generalizing your experience assuming it applies to others. Avoid statements like "everyone knows that...," "we all feel that ...," or "we've all experienced ..." Instead, try "here's how I see it...," "in my experience...," or "here's what I've observed..."

#### Take space/make space

If you tend to talk early and often, challenge yourself to make space for others. If you tend not to talk much, challenge yourself to jump in.

#### Keep it here

Exercise good judgment and respect if people share personal stories. Carry away what you learned without sharing who said what.

#### We don't have to agree

When you disagree, challenge the statement or the behavior instead of the person. Avoid using blame, shame and guilt on yourself or others. Try saying "...yes and..." rather than "...yes but..." to make space for different views to be heard.

#### Be willing to be uncomfortable

Don't mistake discomfort for a lack of safety. It's possible to be safe and uncomfortable at the same time. Lean into the discomfort to see what you can learn.

#### **Expect and accept a lack of closure**

You may leave with more questions than answers and that's okay. We won't dismantle racism in a single meeting. Understand that the conversation was part of an ongoing journey.

#### Use "ouch" and "oops"

We may say something without intending to harm or offend, but harm or offense might result anyway. If we notice ourselves saying something regrettable, we can say "oops" and try again. If we notice others saying it, we can say "ouch" and share what was off-putting in a sentence or two. Use these teachable moments to highlight the difference between intent and impact in a straightforward way— again, no shaming or blaming—to flag things that hurt or offend.

#### Recognize the difference between intent and impact

Despite our best intentions, we can cause harm to others. Be willing to acknowledge and repair the offense first. Don't start by insisting on recognition of your good intentions.

#### Recognize the partial nature of our truth

Humility and perspective are essential. Remember that what you think may not be true. Even if it is, it may not be complete. And it may not be true for everyone.

#### **Enable empathy and compassion**

Empathy is about understanding and sharing in the feelings of others. Compassion is concern for the suffering or challenges of others.

#### Be present

Eliminate distractions so you can be in the moment physically, mentally and emotionally.





Introduction

Part One: Get Ready

Part Two: Practice Equity Daily







Part One: Get Ready > 3. Bring champions together and launch your process

### TOOLS FOR A DEEPER DIVE

#### **The Four Building Blocks of Change**

Tessa Basford and Bill Schaninger, McKinsey Quarterly

This short article discusses how efforts to change mindsets and behaviors are more successful when they include four key actions: role model; foster understanding and conviction (the "why" of the change); reinforce changes through formal mechanisms; and develop talent and skills.

#### How to Make Collaboration Work: Powerful Ways to Build Consensus, Solve Problems, and Make Decisions

#### **David Straus**

This book describes the principles and practices of collaboration known as the Interaction Method, a foundation on which the Interaction Institute for Social Change has built additional tools focused on equity and inclusion, networks for social change and the power of love as a force for social change. Although the book doesn't speak directly to race, equity and inclusion, you'll find a lot of guidance on how to build the kind of collaborative culture and planning processes that will support your race, equity and inclusion work.

You can read the opening section here.



See also, Communications tools in Tools for a Deeper Dive in the Making the Case for Change section





Recognize that your role is not simply to persuade people to come on a journey with you. You're also facilitating their engagement with the ideas and creating space for them to participate. As you do, you enable everyone in the conversation to have a voice and ensure they are treated with respect and dignity. The more you can make creative and caring spaces for this work, the more people will be excited to engage further. That requires deep self-awareness, a willingness to prioritize the engagement of others and the capacity to recognize and work with emotions in yourself and others. Here are a few practical tips:

Ground yourself. Connect to your values and source of strength and power. Forgive yourself for imperfections and do the same for others. Be ready to create a safe space that can hold the pain and strong emotions associated with these issues without becoming overwhelmed or swept away yourself.

Keep doing your personal work on understanding your own racial identity; your worldview regarding race, racism and other forms of oppression; and your understanding of how your identity affects your work for racial equity. Be willing to use yourself as a tool and share mistakes you've made.

Understand your worldview as it relates to race, racism, power and privilege (e.g., analysis of problems and root causes, assumptions and theories about what can change and how to change it). Be ready and willing to articulate it if that will serve the group.

Challenge yourself to listen non-judgmentally. Practice compassion and empathy for participants, particularly those with whom you do not agree.

Be willing to meet people where they are. Understand and be patient with others in different stages of their own journey through these issues.

Be willing to learn. Acknowledge that any one person has only a partial grasp on the truth, at best. Be willing to be challenged; be willing to change your mind; be willing to deal with ambiguity and momentary confusion without rushing toward resolution.

Be willing to direct. You are committed to values and a process and you're using tools and skills to get there. Honor your role and don't be afraid to guide. Oftentimes, you need to redirect people from a focus on interpersonal racism to a focus on organizational policy and systems change.

Pursue understanding. Give yourself and others permission to seek understanding without committing to agreement. Attempt to understand things you don't agree with or accept.

Envision yourself handling challenging situations with grace and effectiveness.

Take care of yourself. Eat and sleep well. Exercise and play. Find opportunities to reflect, refresh and connect with people and activities that restore your soul.

#### Be prepared to deal with strong emotions.

- As a facilitator, actively work to become comfortable with strong emotions. Watch challenging documentaries to increase your capacity to hold others' pain. Observe your reactions when you hear others express strong emotions and practice centering yourself as you engage. Acknowledge others' emotions and create space for people to take care of themselves, manage their own emotions and get back into the conversation as they're willing and able. It's not your role to manage other people's reactions or emotions for them.
- Understand that anger often masks other emotions, such as fear, shame, or sadness. Listen for what might be beneath the surface.
- > Remember that people respond to and express emotions differently. Everyone is entitled to experience their emotions without being told that they "shouldn't feel that way." Recognize and be ready to reflect back to the group the ways in which insisting on how others should feel or insisting that they should express themselves in a quiet, measured discussion style (as in "let's not shout" or "let's not get too excited about this")-can privilege some culturally-based forms of expression over others.

Source: Interaction Institute for Social Change. May be used and reproduced by local United Ways for non-commercial use, with attribution. This tool was developed based on experiences of many IISC consultants with the countless organizations and individuals we have served over the years and the colleagues in many fields from whom we have learned. The original idea for this piece grew out of an 18 month learning process about facilitating dialogues about race that IISC facilitated for a group of community development practitioners, funders and intermediaries convened by the Local Initiatives Support Corporation-Boston office and the Massachusetts Association of Community Development Corporations, which was supported by Third Sector New England's Diversity Initiative. The section on preparing oneself to serve was influenced not only by IISC's ongoing internal learning processes about the love that does justice and spiritual leadership, but also by our work with the Sisterhood for Peace: Transforming Sudan project of My Sister's Keeper and coach and colleague Selena Sermeño.









### Part One: Get Ready > 4. Prepare yourself to facilitate. PREPARING FOR THE PROCESS OF CONVERSATIONS

Your role in designing and guiding the process has multiple dimensions and responsibilities. Creating a well-designed process and keeping people in it increases the likelihood that the experience will be of service and a gift to the group.

The guidelines below describe ways to prepare before and engage during meetings. We think of meetings expansively—any time two or more people get together virtually or in person to share information, make decisions, or take action. So a phone call or video chat between two or more people is just as much a meeting as an in-person discussion with 20 participants. Meetings can be simple, informal conversations over a meal or formal, structured processes in a conference room.

The tips below are scalable for groups of different sizes in different settings. The key is to think through how you'll guide the meeting before you're actually in it.

#### BEFORE THE CONVERSATION AS PART OF YOUR OVERALL MEETING PREPARATION:

- Link the conversation to an overall strategy. Be clear in your own mind about why focusing on race, equity and inclusion is important for the success of the group/organization. Understand how this focus relates to the work that the people in this group/organization are already doing. Be sure to understand who is sponsoring or calling for the conversation and why they think it's important, as well as other points of view.
- Assess the group's readiness for the conversation. For instance:
  - > What troubleshooting needs to take place before the group can move ahead on this issue? Are they ready to focus on issues beyond interpersonal racism?
  - > If the group is weak on the basics of collaboration, listening, or consensus building, consider implementing the skills of "Collaboration 101" in order to develop the skills to have complex conversations. (e.g., listening for understanding, withholding judgement, productively exploring alternative points of view)
  - > If the group tends to avoid conflict, consider beginning with a simpler conversation that can build skill and experience handling multiple viewpoints and conflict before beginning a collective dialogue about race. Progress strategically toward conversations about race as the group builds skill.
- Help participants understand the whole process and how individual conversations fit into it. What is the series of discussions, workshops and other activities related to race, equity and inclusion? What are your plans for next steps after this specific conversation? Be clear about how decisions will be made throughout the process.
- Establish a clear focus and goals for each meeting. Don't try to take on everything in one conversation. Make sure you have clear desired outcomes (e.g., a shared understanding of XYZ; a prioritized list of issues and concerns to address in the future; an agreement to make race, equity and inclusion an explicit priority; a list of action items for the next six months)
- Prepare to involve a broad range of stakeholders in the series of conversations about this work. Identify or seek volunteers who have varying views to work with you to design your meeting(s) or planning process.
- Be sure to consider and address logistics and language needs from the viewpoint of different stakeholders and the cultures from which they come.
- Be sure that the materials (e.g., pre-reading, handouts) and activities are appropriate for the audience. Design for the whole person, both left and right brain. For the left brain, create structured conversations and offer supporting materials or information. For the right brain, use creative activities and tools such as art projects, films, storytelling, or handson experiences.





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

### PREPARING FOR THE PROCESS OF CONVERSATIONS, CONT.

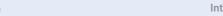
#### **DURING ANY CONVERSATION:**

- Begin by building an agreement about meeting norms or ground rules together. Suggest "ouch." If a person is offended or hurt by something that's said or done, they should say "ouch" and explain the impact in the spirit of creating a teachable moment.
- Create opportunities for relationship building within the dialogue (e.g., opener/ice breakers, paired activities, small group conversations) that enable participants to discover interests or experiences they share.
- Keep the conversation on track before beginning by ensuring agreement about the process, roles and desired outcomes; clarifying the process along the way; reflecting back what is emerging in the conversation; and using the agenda as a guide to help the group achieve its desired outcomes.
- Intervene as needed to get the conversation back on track. Be sure to tailor the interventions as appropriate to the group.
- Expect that some (possibly many) people will feel uncomfortable at different moments during conversations about race. Help the group progress in the midst of discomfort by:
  - Reinforcing the group's norms
  - ➢ Inviting people to make "I" statements and own their viewpoints (rather than saying things like "we all know that..." or "it's clear that...")
  - > Acknowledging the difficulty and pain associated with the conversation and creating space for people to pause, reflect and even briefly disengage if necessary in order to take care of themselves
  - Encouraging people to separate the search for understanding from assessing, judging, agreeing, or disagreeing
  - Modeling respectful listening
  - > Offering clear, useful feedback to individuals and the group

- Reminding people that the problems are historical in nature and reinforced by policies; people are not bad but many policies (re)create inequities
- Designing a mix of small group and large group conversations to enable people to share their thoughts and feelings in different settings
- Creating opportunities for people to connect with one another and reflect on and connect with their own sources of power and purpose
- Designing a physical space that creates familiarity and comfort for participants
- Balancing power dynamics by inviting people to self-manage their participation to share the air space; noticing and intervening if a few people tend to use a lot of air time or frame the conversation; actively encouraging participation, especially from quieter participants:
  - · by design choices (e.g., round robin, when you move around the circle to take comments from each person rather than a brainstorm when people jump in randomly)
  - · by direct invitation (e.g., "let's hear from some of the folks who haven't spoken in the past 15 minutes")
  - Be aware and remind the group of the difference between intent and impact. Help group members to educate one another about the impact of their words and actions.
- Creating opportunities for people to connect with one another and reflect on and connect with their own sources of power and purpose
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- Balancing power dynamics by inviting people to self-manage their participation to share the air space; noticing and intervening if a few people tend to use a lot of air time or frame the conversation; actively encouraging participation, especially from quieter participants:
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Introduction Part One: Get Ready





### Part One: Get Ready > 4. Prepare yourself to facilitate. PREPARING FOR THE CONTENT OF THE CONVERSATION

Ordinarily, facilitators do not take responsibility for the content of a conversation. But when the issue is race, you'll likely be called upon to provide guidance about the substance behind tough guestions and may even need to present some content (such as definitions of terms). Even if this isn't the case, you'll need a deep understanding of the content in order to serve the group well by: listening for underlying meaning; unearthing and testing assumptions; synthesizing parts of the conversation; noticing what might be causing the group to get stuck; and mirroring the group's thinking in ways that allow them to hear their thoughts, gain deeper insight and agree to emerge.

#### BE READY TO DEFINE TERMS AND USE DEFINITIONS AS TEACHABLE MOMENTS.

- · Acknowledge that people have different definitions of race and racism. To avoid talking past one another, it's often helpful to define terms using working definitions or inviting the group to build its own working definitions. Use context-appropriate examples to demonstrate each definition so they are clear. If the group gets stuck, try building agreement around a term "for the purpose of this conversation only." If that doesn't work, have the group experiment with moving forward without consensus on definitions in order to keep talking. It's possible to accomplish a lot even without such a consensus and sometimes consensus emerges through the process of dialogue.
- Clarify the different levels at which power and oppression operate. Facilitate a plan to understand and distinguish between the ways people express bias, prejudice and bigotry, and the impact of systems, collective practices and norms that create systematic and accumulated advantages for Whites and disadvantages for Black, Indigenous and other people of color.
- Anticipate different perspectives that are likely to arise based on the identities and experiences of participants. For instance, in many conversations about power and oppression, people who are in the "up" or advantaged categories (White people in the case of racism and racial equity) tend to focus on individual attitudes and behavior, while people in the "down" or disadvantaged categories (Black, Indigenous and other people of color in this case) tend to focus on structural and systemic analysis. This is a byproduct of the reality that "downs" have to pay a lot more attention to systemic/structural aspects of oppression than "ups" because the systems tend to "work" for the ups.

#### RECOGNIZE THE ASSUMPTIONS AND WORLDVIEWS OF PEOPLE IN THE ROOM.

- Listen for how unspoken assumptions about the nature of the problem and strategies for solving it drive the conversation. Guide participants to articulate their implicit theories about why the situation exists and what can be done about it. Help them focus on policies, not people, as the problem to be addressed.
- · Make the assumptions visible and testable. Help people hear and understand their differing worldviews as a way to make sense of specific disagreements or differences of opinion. Use yourself as an example, making visible your assumptions and worldview.
- · Create opportunities for dissent and encourage people to express differing perspectives, assumptions and worldviews.









## Part One: Get Ready > 4. Prepare yourself to facilitate. PREPARING FOR THE CONTENT OF THE CONVERSATION, CONT.

#### UNDERSTAND WHO'S IN THE ROOM AND THEIR EXPERIENCE WITH THE ISSUES.

- · Acknowledge power. In any organizational or community context, power hierarchies affect comfort level. The racial backgrounds of the people with more power can also affect comfort level. Those who traditionally have less power tend to lose trust when power dynamics are not acknowledged.
- Expect different dynamics if the room is racially homogenous or heterogeneous. For instance, in a racially mixed group, people may tend to withhold their questions or thoughts in order not to offend, to avoid exposing their lack of understanding, or to avoid "airing dirty laundry in public." In racially homogeneous groups, participants may be more willing to acknowledge what they don't know or what concerns them about the issues.
- Recognize that internalized racial oppression often manifests, even when there are no White people present. Similarly, internalized racial superiority often manifests, even in the absence of Black, Indigenous and other people of color.
- Recognize that we have different roles in undoing racism, based on our identity. White people can be particularly focused on identifying and changing policies and practices that reinforce racism.

#### UNDERSTAND SOME OF THE LIKELY DYNAMICS IN CONVERSATIONS ABOUT RACE AND RACIAL EQUITY, RACISM AND WHITE PRIVILEGE.

- Understand that a range of color/racial backgrounds exists within many ethnic and nationality groups and some people within those groups experience color prejudice. race is a social construct, it's named and experienced differently across countries and cultures. Don't assume that the American construct of race is obvious, universal, or makes sense to participants from other backgrounds. Recognize the complexity for immigrants learning the unspoken norms and attitudes about race in the United States and that they may have internalized those norms and attitudes unconsciously.
- Recognize that other tensions exist within racial groupings based on ethnicity, nationality, gender, immigration and socioeconomic status and other factors. Any of these factors could easily be conflated with race or put forward as an alternative to avoid a conversation about race.
- · Anticipate that dynamics will be different among people who regularly see or work with one another versus people who don't. In some cases, fear of creating tensions within an ongoing group may hinder participants' willingness to be candid. On the other hand, in some cases, ongoing relationships may help to create a space for deeper trust and honesty.
- Anticipate defensive reactions to the concept of White privilege, particularly for people who are learning about it for the first time or just beginning to explore the concept. Some participants may focus on their own behavior and attitudes ("I don't discriminate!") or their own challenges in society based on other aspects of their identity ("being White isn't creating advantages for me as a working-class person!"). Some may challenge the existence of structural racism. Some may think they have nothing to contribute to a conversation about racism because they haven't been discriminated against and don't believe that they actively discriminate against people. Some White people will be more comfortable identifying with Black, Indigenous and other people of color than with other White people. Many White people also are more comfortable talking about areas in which they are a "down" and will try to shift the conversation to gender, anti-Semitism, homophobia, etc. Another frequent dynamic is that people with privilege are uncomfortable exploring privilege and will want to move quickly to action.
- Expect that people will come to the conversation with different understandings and levels of investment in the issue. Some may see a dialogue about race and racial equity as an "add-on" rather than central to their work or lives. Some people may feel "we have to do something!" and others will feel that "dialogue is the thing we have to do!" Some will have passion about this issue and will be ready to engage. Consider how much support you need to get started, knowing you may not have everyone's enthusiasm at the beginning. Encourage people to see the focus on race, equity and inclusion is part and parcel of how they do their existing work and not an additional task.









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

### PREPARING FOR THE CONTENT OF THE CONVERSATION, CONT.

#### KNOW THE HISTORY OF THE COMMUNITY/ISSUE/ORGANIZATION AND ANTICIPATE HOT BUTTON ISSUES FOR THIS PARTICULAR GROUP. BE READY TO RESPOND IN WAYS THAT MOVE THE CONVERSATION FORWARD.

- Understand as much as you can about how structural racism has manifested itself in the specific experience of the discussion, participants, community and organization(s) you're working with. How does structural racism relate to the mission and purpose of the organization/group or the issues it's addressing? (For example, a project to facilitate home ownership by Black, Indigenous and other people of color in low-income urban communities is an attempt to address the consequences of structural racism in the housing market.)
- Be ready to engage typical hot button issues, such as:
  - > "The real problem is economics/class."
  - > "The leaders of institutions in this neighborhood are paternalistic. They never want to hear from the people who use the services they provide."
  - > "Those who run this organization exclude Black, Indigenous and other people of color from important decisions and overlook them when it comes to hiring and promotions."
  - > "There's no need for affirmative action any more. Racism has been solved."
  - > "Focusing on diversity is watering down the quality of our students, workforce, etc. and is discrimination against Whites."
  - > "That (negative attitudes and behavior by Black, Indigenous and other people of color in reference to White people) is 'reverse racism."
  - "Black, Indigenous and other people of color can be racist against other people of color."

#### · For any of these kinds of issues

- Educate yourself about the likely issues and the range of related data and viewpoints.
- ▷ Be clear about your role. Before you respond to a hot button comment, remember that it's not your duty to "correct" the person. It may not even be your role to participate in the content of the conversation. If your role doesn't explicitly include training, education, or participation around content but you believe that getting into it could be of service, build an agreement with the group before you begin about stepping into that new role and/or offering your perspective.
- > If a comment "pushes your buttons," acknowledge to yourself what has happened and focus on how to deal with your reactions so you can stay in service to the group. That could mean finding a way to set aside your reaction to keep the group on its path. It could mean creating a teachable moment that externalizes what happened as a learning opportunity for the group. It could mean calling a break so you can get centered. Just be sure you're keeping the group's well-being firmly in mind.
- Begin by thanking the participant for raising an issue that they're concerned about without agreeing or disagreeing with the point of view. Then decide whether to deal with the issue now, hold off until later, or defer to another conversation altogether. (IISC calls this "accepting, legitimizing and then dealing with or deferring the comment.")
- > If the group has an "ouch" norm—using a comment that may be inadvertently offensive as a teachable moment—let participants explain the harm.
- > If you and/or the group decide to engage an issue, remember to keep everyone working together in the phases of the agreement building process<sup>28</sup> —first opening, then narrowing, then closing.
  - Opening: be sure everyone understands the issue that's been raised and viewpoints have been expressed and understood
  - Narrowing: assess, organize, or evaluate the different viewpoints
  - · Closing: build agreements about the viewpoints

Remind people that they have the freedom (and actually an obligation) to explore differing viewpoints for understanding. Such exploration doesn't imply or commit people to agree to anything. Most likely, you won't close on the content, but you may have to build a cohesive process to continue to explore the issue.









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

### PREPARING FOR THE CONTENT OF THE CONVERSATION, CONT.

#### HELP AVOID TYPICAL PITFALLS WHEN GROUPS THINK TOGETHER.

- Avoid globalizing or over-generalizing from personal experience or limited anecdotes.
- Avoid looking for an "authoritative voice" in the room who can speak for all members of a particular group. Acknowledge that different opinions and experiences exist within racial groups. Allow participants the freedom to speak from their own experience without "representing" their entire group.
- Avoid compartmentalizing. Encourage participants to bring the conversation back to other parts of their world (e.g., work, home, community).
- Avoid "group think" by:
  - Pressure testing emerging consensus, actively inviting concerns or different viewpoints into the conversation
  - Asking the group "what if..." questions (e.g., "what if there is more to the story than you've articulated?," "what else could explain the situation besides what you've already named?," "what if your own experience is making it difficult to imagine what it's like for others in this situation?").
  - Offering data or alternative ideas that no one in the room is raising for the group to consider
  - Ensuring before the meeting that a wide range of voices and views will be in the room

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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.

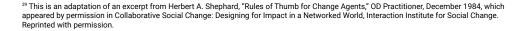
Changing a system requires changing many things in different arenas. Rather than putting all of your focus in one area or one leverage point, catalyze change in many interdependent parts of your system.

#### 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.









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

### **TOOLS FOR A DEEPER DIVE**

#### Audre Lorde Thought of Self-Care as an "An Act of Political Warfare"

This article explores how Lorde believed self-care was a way for Black women in particular to reclaim the right to a sustainable, love-filled way of life, even as they provide love and care to others in their families and communities.

#### Facilitator's Guide for Continuous Improvement Conversations with a Racial Equity Lens

This guide was developed by Living Cities "to support facilitators and leaders to advance cross-sector conversations and efforts aimed at population-level impact."

#### **Nine Self-Care Reminders for the Over-committed Activist**

This post offers practical guidance that connects self-care and community-care.

Notes















Part One: Get Ready > 5. Build shared language and analysis.

### **WORKING GLOSSARY OF CORE CONCEPTS**

#### **GETTING STARTED**

#### Race<sup>30</sup>

A socially constructed way of grouping people based on skin color and other apparent physical differences, which has no genetic or scientific basis. The concept was created and used by White people to justify the social and economic oppression of Blacks and other people of color. (See racism definition below for more details.) The ideology of race has become embedded in our identities, institutions and culture and is used as a basis for discrimination and domination.31

#### **Equity**

Equity is the intentional inclusion of everyone in society. Equity is achieved when systemic, institutional, and historical barriers based on race, gender, sexual orientation, and other identities are dismantled and no longer determine socioeconomic, education and health outcomes.

#### Inclusion<sup>32</sup>

A value and practice of ensuring that people feel they belong and that their input is valued by the whole (group, organization, society, system, etc.), particularly regarding decisions that affect their lives.

#### **Equity-mindedness**

A willingness and ability to:

- Call attention to patterns of inequitable outcomes
- Take personal and institutional responsibility for the success of program participants (e.g., members, students, constituents),
- Critically reassess practices, 4) demonstrate race-consciousness
- Understand the social and historical context of exclusionary practices in their field/area of work.33

#### Racism

A system of oppression based on the socially constructed concept of race exercised by the dominant racial group (Whites) over non-dominant racial groups (Black, Indigenous and other people of color); a system of oppression created to justify social, political and economic hierarchy. The hierarchy was initially constructed with White people at the top and Black and Indigenous people at the bottom, with other people of color groups slotted in between. Racism can be understood as what happens at the intersection of race prejudice and power.34

#### Internalized racism

The set of private beliefs, prejudices and ideas about the superiority of Whites and the inferiority of people of color. Among people of color, it manifests as internalized oppression. Among Whites, it manifests as internalized racial superiority.

#### Interpersonal racism

The expression of racism between individuals. It occurs when individuals interact and their private beliefs affect their interactions.

#### · Institutional racism

Discriminatory treatment, unfair policies and practices, inequitable opportunities and impacts within organizations and institutions, all based on race, that routinely produce racially inequitable outcomes for people of color and advantages for White people. Individuals within institutions take on the power of the institution when they reinforce racial inequities.

#### Structural racism

A system in which public policies, institutional practices, cultural representations and other norms work in various, often reinforcing ways to perpetuate racial group inequality. It is racial bias among institutions and across society. It involves the cumulative and compounding effects of societal factors including the history, culture, ideology and interactions of institutions and policies that systematically privilege White people and disadvantage people of color.

#### Anti-Black racism

Describes how racism specifically targets and places Black people at the bottom of the racial hierarchy. While racism affects people of color from all backgrounds, it has a particular impact on Black people. It's important to understand these nuances so we don't replicate them in our efforts to combat racism and build solidarity among different people of color groups.

<sup>30</sup> Adapted from Race: The Power of an Illusion. San Francisco: California Newsreel, 2003.

<sup>&</sup>lt;sup>31</sup>Omi, M. & Winant, H. (1994). Racial formation in the United States: From the 1960s to the 1990s. New York and London: Routlege as quoted in Seven Steps to Embrace Race Equity, Annie E. Casey Foundation

<sup>32</sup>Adapted from The Equity and Inclusion Campaign.

<sup>33</sup> Adapted from What is Equity-Mindedness, Center for Urban Education, University of Southern California, https://cue.usc.edu/equity/

<sup>&</sup>lt;sup>34</sup>Àdapted from multiple sources, including: Race Forward, Kirwan Institute for the Study of Race and Ethnicity, People's Institute for Survival and Beyond.







Part One: Get Ready > 5. Build shared language and analysis.

### **WORKING GLOSSARY OF CORE CONCEPTS, CONT.**

#### **GOING DEEPER**

#### Class

Relative social status based on income, wealth, race, power, position, occupation and education.35

#### **Diversity**

Each individual is unique and groups of individuals reflect multiple dimensions of difference including race, ethnicity, gender, class, sexual orientation, age, physical abilities, religious beliefs, political beliefs and cognitive styles.

#### **Dominant culture**

Refers to the established language, religion, values, rituals and social customs on which society was built. It has the most power and is widespread and influential within a social entity such as an organization, in which multiple cultures are present. An organization's dominant culture is heavily influenced by the leadership, management standards, and preferences of those at the top of the hierarchy. In this toolkit, dominant culture refers specifically to the American context in which organizational culture is predominantly defined by White men and White women in positional power.

#### Intersectionality<sup>36</sup>

An analysis of the connections between systems of oppression (e.g., racism and classism, racism and sexism) and how individuals experience those intersecting or compounding systems of oppression. It's not a theory of diversity or multi-dimensional identity.

#### Microaggressions

Brief and commonplace verbal, behavioral, or environmental indignities, whether intentional or unintentional, that communicate hostile, derogatory, or negative racial slights and insults toward Black, Indigenous and other people of color.

#### Racial justice

The systemic, fair treatment of people of all races resulting in equitable opportunities and outcomes for everyone. All people are able to achieve their full potential in life, regardless of race, ethnicity, or the community in which they live. A racial justice framework can move us from a reactive posture to a more powerful, proactive and even preventative approach.

#### Racial oppression

Race-based disadvantages, discrimination and exploitation based on skin color."38

#### Racial privilege

Race-based advantages and preferential treatment based on skin color (often experienced without any conscious effort or awareness).39

#### Stereotype

A standardized mental picture that is held in common about members of a group that represents an oversimplified opinion, attitude, or unexamined judgment, without regard to individual difference.

#### Systemic equity

A complex combination of interrelated elements consciously designed to create, support and sustain social justice. It is a robust system and dynamic process that reinforces and replicates equitable ideas, power, resources, strategies, conditions, habits and outcomes.

#### **Unconscious bias/implicit association**

The attitudes or stereotypes that affect our understanding, actions and decisions in an unconscious manner. They are activated involuntarily, without conscious awareness or intentional control. They can be either positive or negative. Everyone is susceptible.<sup>40</sup>

#### White supremacy

The existence of racial power that denotes a system of structural or societal racism that privileges White people over others, regardless of the presence or absence of racial hatred. White racial advantages occur at both the collective and individual levels. Both people of color and White people can perpetuate white dominant culture, resulting in the overall disenfranchisement of Black, Indigenous and other people of color in many aspects of society.41

#### White supremacy culture

Characteristics of white supremacy that manifest in organizational culture and are used as norms and standards without being proactively named or chosen by the full group. The characteristics are damaging to both Black, Indigenous and other people of color and White people because they elevate the values, preferences and experiences of one racial group above all others. Organizations that are led by Black, Indigenous and other people of color, or where a majority of staff are Black, Indigenous and other people of color, can also demonstrate characteristics of white supremacy culture.

<sup>35</sup>Source: Classmatters.org, which contains materials from Betsy Leondard-Wright's

Class Matters: Cross-Class Alliance Building for Middle-Class Activists.

<sup>36</sup>Adapted from writings of Kimberlé Crenshaw.

<sup>37</sup> Source: Race Forward

<sup>38&</sup>quot;Seven Steps to Embrace Race Equity," Annie E. Casey Foundation; parenthetical statements added.

<sup>39&</sup>quot;Seven Steps to Embrace Race Equity," Annie E. Casey Foundation; parenthetical statements added.

<sup>40&</sup>quot;Implicit Bias Review: Race and Ethnicity-Views from Inside the Unconscious Mind," Kirwan Institute for the Study of Race and Ethnicity.

<sup>&</sup>lt;sup>41</sup>Conor Friedersdorf, "Too Much Stigma, Not Enough Persuasion," The Atlantic, November 30, 2016, https://www.theatlantic.com/politics/archive/2016/11/the-scourge-of-the-left-too-much-stigma-not-enough-persuasion/508961/, quoted in "Awake to Woke to Work," Equity in the Center.





Part One: Get Ready > 5. Build shared language and analysis.

### **TOOLS FOR A DEEPER DIVE**

For even more on the history of systemic racism, racist ideas, anti-Blackness in the United States and other core concepts, consult these resources.

#### A few important readings about how white supremacy culture manifests in organizational life

- Infiltration: How the values of oppressive systems tend to arise in organizations (and what to do about it), AORTA Cooperative
- · White Dominant Culture and Something Different, Adapted by Partners for Collaborative Change, based on "White Supremacy Culture" By Tema Okun and Kenneth Jones, drWorks

#### A few of our favorite books

- · The Color of Law: A Forgotten History of How Our Government Segregated America, Richard Rothstein
- Stamped from the Beginning: A definitive history of racist ideas in America, Ibram Kendi

#### A few key online resources

- RacialEquityTools.org/Core Concepts page, includes a variety of readings, video resources and curricula (some free and some at modest cost)
- Seeing White Series, Scene on Radio, a 14-part series that features some of the authors above and many others
- Decoded, "a weekly series on MTV where the fearless Franchesca Ramsey tackles race, pop culture, and other uncomfortable things, in funny and thought-provoking ways. Half sketch comedy, half vlog."
- Race + Class, readings and resources from CLASS Action
- · Understanding Race: Are We So Different, An interactive companion to the traveling science museum of the same name, with notes on history, science and human variation and lived experiences.

#### A few useful training resources

See on-line resources above, plus:

- Cracking the Codes: The System of Racial Inequity, World Trust
- Diversity Toolkit: A Guide to Discussing Identity, Power and Privilege, a facilitator's guide for a day-long workshop
- Give your own unbiasing workshop, a resource from Google that includes a customizable slide deck and facilitator's agenda for offering workshops about unconscious bias
- Managing Bias, a series of short training videos from Facebook that focuses on unconscious bias and covers the implications of the following topics for employees and managers: introductions and first impressions; stereotypes and performance bias; performance attribution bias; competency/likability tradeoff bias; maternal bias; business case for diversity and inclusion; and what you can do.
- Project Implicit, Mahzarin Banaji and Anthony Greenwald. This online test of implicit association (aka unconscious bias) offers separate tests focused on race, gender, sexual orientation and other topics.

Notes		





# PART TWO

## Practice Equity Daily

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Part Two: Practice Equity Daily







## Part Two: Practice Equity Daily > 1. Build equity-minded culture, structures and systems. RACE EQUITY CULTURE ASSESSMENT<sup>44</sup>

#### THE RACE EQUITY CYCLE APPLIED—CULTURE BUILDING

This initial assessment tool is based on Awake to Woke to Work: Building A Race Equity Culture by Equity in the Center.

	We haven't started to work on this	We have plans to implement this		This is in place		This is well-integrated into process/routine		
	The organization communicates proactively about race equity values and initiatives, both internally and externally			•		ganizational race equity work; we e eir role in creating an equitable cult		
and	Organizational meetings are conducted in a manner that supports equity and inclusion, and values diverse ways of speaking, thinking, debating, reflecting, and making decisions.			Accountability is threaded across all efforts to support and sustain racially equitable organization				
can	The organization fosters a positive environment where people feel they can raise race-related concerns about policies and programs without experiencing negative consequences or being labeled as a troublemaker			enabling people of col	lor t	red as assets to teams and the orga o bring their full selves to work and their job responsibilities		
Mar	nagers receive support to manage/n	nentor across differences						

Total:		
Divide total by 7:	Stage:	

**Scale:** 0–1 Waking Up • 1–2 Awake • 2–2.5 Woke • 2.6–3 Work

#### **Questions to consider next steps:**

- Which of the above actions should be prioritized to move the culture-building processes to the next stage of race equity?
- Are there ways in which culture-building strategies could be streamlined across the organization? How could that be done to prioritize an enhanced race equity approach and create additional accountability?
- · In what ways could current tactics be improved?









## Part Two: Practice Equity Daily > 1. Build equity-minded culture, structures and systems. USE EQUITY PRIMES, PROMPTS AND PROTOCOLS TO REDUCE BIAS<sup>42</sup>

As you practice race equity and inclusion, you'll need to build individual and organizational capacity so you can move the work forward together in a sustainable way.

<sup>&</sup>quot;Equity protocols and practices use equity prompts and primes an ongoing basis, so they become long-term institutionalized practices and habits." Source: Race Forward

DEBIASING STRATEGIES	SAMPLE PROMPTS
Individuation	<ul> <li>What is this person asking for/what do they specifically need? What do I know about them personally that informs my thinking?</li> <li>In what ways am I assuming that this person embodies stereotypes I know about their social identities?</li> </ul>
Learning and reminders about implicit bias	<ul> <li>Learn about specific ways implicit bias shows up in your field/area of work.</li> <li>How could one of the 10 key manifestations of implicit bias⁴³ operate in this situation? Which ones most need our attention?</li> <li>Selective attention—We tend to see some things but not others, depending on the context (e.g., pregnant women are more likely to notice other pregnant women).</li> <li>Diagnosis bias—the propensity to label people, places and things based on our first impression, regardless of evidence put before us.</li> <li>Pattern recognition—the tendency to sort information based on prior experience.</li> <li>Value attribution—the inclination to infuse a person or thing with certain qualities based on initial perceived value (e.g., judge someone's importance based on what they are wearing).</li> <li>Confirmation bias—the tendency to unconsciously seek out evidence to confirm what we believe is true.</li> <li>Priming effect—the tendency to respond to something based on expectations created by a previous experience or association.</li> <li>Commitment confirmation—the tendency to become attached to a particular point of view, even when it may be obviously wrong.</li> <li>Stereotype threat—the experience of anxiety or concern in a situation where a person has the potential to confirm a negative stereotype about their social group.</li> <li>Anchoring bias—the tendency to rely too heavily on one trait or piece of information when making decisions (e.g., assuming that people from elite schools are more qualified).</li> <li>Group think—the influence of group associations and beliefs on our thoughts and behaviors.</li> </ul>

<sup>&</sup>quot;Equity prompts are questions or reminders that individuals can use to reduce bias in their actions and decisions.

<sup>&</sup>quot;Equity primes are tools, images and reminders that evoke consciousness to counteract implicit bias. They are typically prompts, adopted by many individuals in an organization.









## Part Two: Practice Equity Daily > 1. Build equity-minded culture, structures and systems. USE EQUITY PRIMES, PROMPTS AND PROTOCOLS TO REDUCE BIAS, CONT. 42

DEBIASING STRATEGIES	SAMPLE PROMPTS		
Accountability mechanisms	<ul> <li>To whom do I need to explain my decision? What's my rationale?</li> <li>Who can I ask to serve as a bias-spotter partner?</li> <li>How can I receive feedback graciously and non-defensively? What meaning do I make of the feedback I receive? How can I put feedback into practice?</li> </ul>		
Perspective taking	<ul> <li>How is this person's perspective different than mine? What accounts for the differences? How would my perspective be different if we shared the same experience or identity? What am I missing in this situation because of my perspective?</li> <li>What if the person's perspective and experience were true, even if I can't imagine it, see it, or understand it?</li> </ul>		
Deliberative processing (thinking about thinking)	<ul> <li>What information am I relying on? What other information am I dismissing or what might I have missed?</li> <li>What am I assuming here? What other assumptions could I make?</li> <li>How did I come to this conclusion? What other conclusions could I come to?</li> <li>Am I unfairly using old information/prior experience to pre-judge this situation?</li> <li>What am I feeling and how is that affecting my thinking?</li> <li>What are my "gut instincts" and what is shaping them?</li> </ul>		





Part Two: Practice Equity Daily







## Part Two: Practice Equity Daily > 1. Build equity-minded culture, structures and systems. USE EQUITY PRIMES, PROMPTS AND PROTOCOLS TO REDUCE BIAS, CONT. 42

#### SAMPLE EQUITY PROTOCOLS AND PRACTICES

#### **Develop explicit messaging**

- Visuals and quotes that defy stereotypes and express shared values.
- Card with three questions to ask yourself about decisions (taken from above).
- Style guides (e.g., Racial Wealth Gap and Progressive's Style Guide).
- Swag (e.g., screen savers, mouse pads, message cubes).

#### Prevent biased decision making/improve the conditions of decision-making processes.

- · Gather, analyze and use data.
- Include stakeholders in analysis and decision-making processes.
- Apply specific de-biasing strategies.
- Create space for reflection, reduce urgency/emergency decision making for non-emergency situations.

#### Identify "choice points" and develop specific prompts, primes, or protocols.

- Racial equity impact assessments.
- Bench cards (judges).
- Budget guidelines.
- Discipline guidelines (educators).
- Equity and inclusion checklist.
- Inclusion metrics and standards (e.g., every hiring pool must have diverse candidates).

#### **Explore the context or structure of opportunity.**

- Ask "how can I/we address those contextual or structural factors?" rather than focus on "fixing the individual."
- Identify structural barriers to access and opportunity.

#### **Develop shared accountability mechanisms.**

- SMART diversity, equity and inclusion goals on everyone's work plan and performance review.
- Standing meeting agenda items for updates on diversity, equity and inclusion activities and goals and problem solving as needed.
- Bias-spotter partnerships/bias buddies.









## Part Two: Practice Equity Daily > 1. Build equity-minded culture, structures and systems. INDICATORS OF SUCCESSFULLY ENGAGED SENIOR LEADERSHIP

Senior leaders play a significant role in sustaining an organization's focus on race, equity and inclusion. As you think about engaging them in your own efforts, consider the following indicators, drawn from "Awake to Woke to Work: Building a Race Equity Culture" by Equity in the Center. This research documents a developmental pathway from "awake" (focused on representation and diversity) to "woke" (focused on inclusion) to "work" (focused on equity).

#### **SENIOR LEADERSHIP LEVER**

	PERSONAL BELIEFS & BEHAVIORS	POLICIES & PROCESSES	DATA
Awake	<ul> <li>Believes diverse representation is important, but may feel uncomfortable discussing issues tied to race</li> <li>Responds to staff encouragement to increase diversity in the organization</li> </ul>	Places responsibility for creating and enforcing DEI policies within HR department	Has started to gather data about race disparities in the populations they serve
Woke	<ul> <li>Prioritizes an environment where different lived experiences and backgrounds are valued and seen as assets to teams and the organization</li> <li>Regularly discusses issues tied to race and recognizes staff members are on a personal learning journey toward a more inclusive culture</li> </ul>	<ul> <li>Takes responsibility for a long-term change management strategy to build a race equity culture</li> <li>Has a critical mass of people of color in leadership positionsa</li> <li>Evaluates hiring and advancement requirements that often ignore system inequities and reinforce white dominant culture, such as graduate degrees and internship experience</li> </ul>	<ul> <li>Analyzes disaggregated data and root causes of race disparities that impact the organization's programs and the populations they serve</li> <li>Disaggregates internal staffing data to identify areas where race disparities exist, such as compensation and promotion</li> <li>Reviews compensation data across the organization and staff levels to identify disparities by race and gender</li> </ul>
Work	Models a responsibility to speak about race, dominant culture, and structural racism, both inside and outside the organization	<ul> <li>Shows a willingness to review personal and organizational oppression and has the tools to analyze their contribution to structural racism</li> <li>Identifies organizational power differentials and changes them by exploring alternative leadership models, such as shared leadership</li> <li>Uses a vetting process to identify vendors and partners who share their commitment to race equity</li> <li>Ensures salary disparities do not exist across race, gender, and other identities through analysis of mandated all-staff compensation audits</li> </ul>	<ul> <li>Can illustrate, through longitudinal outcomes data, how their efforts are impacting race disparities in the communities they serve</li> <li>Can track retention and promotion rates by race and gender across the organization and staff levels</li> <li>Takes immediate action when compensation audits reveal salary disparities for staff who are being underpaid in comparison to peers based on race or other identities</li> </ul>



Part Two: Practice Equity Daily





## Part Two: Practice Equity Daily > 1. Build equity-minded culture, structures and systems. INDICATORS OF SUCCESSFULLY ENGAGED SENIOR LEADERSHIP, CONT.

#### LEADERSHIP LEVER IN PRACTICE

#### **AWAKE**

#### **Leadership for Educational Equity:**

Analyzes disaggregated program data to identify how many people of color participated in external leadership programs about running for elected office

#### WOKE

#### **Leadership for Educational Equity:**

Sets and communicates goals around diversity, equity and inclusion across all programming. Incorporates goals into staff performance metrics. Adjusts strategy upon quarterly reviews at the department and organizational levels.

#### Year Up:

At the onset of the organization's race equity work, senior leaders were given specific talking points to spark conversation in staff meetings. Prompts included "what's the role of a sponsor vs. an ally?" and "how can we be allies in this work?"

#### **WORK**

#### **Leadership for Educational Equity:**

After a four-month pilot, the executive coaching program for VPs expanded to a year-long investment. VPs receive coaching about diversity/inclusion to help improve their team organizational leadership.

Source: "Awake to Woke to Work: Building a Race Equity Culture," Equity in the Center. Boston, Mass: Harvard Business Press, 2009.





## Part Two: Practice Equity Daily > 1. Build equity-minded culture, structures and systems. INDICATORS OF SUCCESSFULLY ENGAGED MANAGEMENT

Engaging management is an important leverage point for any organizational change. Their day-to-day actions and words can make or break an initiative. As you think about engaging managers in your race, equity and inclusion efforts, consider the following indicators, drawn from "Awake to Woke to Work: Building a Race Equity Culture" by Equity in the Center. Their research documents a developmental pathway from "awake" (focused on representation and diversity) to "woke" (focused on inclusion) to "work" (focused on equity).

#### **MANAGEMENT LEVER**

	PERSONAL BELIEFS & BEHAVIORS	POLICIES & PROCESSES	DATA
Awake	<ul> <li>Pushes past their own low comfort level to discuss race-related issues with staff</li> <li>Possesses an emergent understanding of the race disparities that exist among the populations they serve</li> </ul>	Has familiarity with the organization's diversity policies	Has diversity goals outlined in their hiring plans that focus on increasing the number of racially diverse staff members
Woke	<ul> <li>Can recognize and speak about race disparities and/ or bias internally and externally</li> <li>Values diverse teams, providing training and coaching/mentoring support</li> </ul>	<ul> <li>Takes responsibility for the implementation of change management strategies to build a race equity culture</li> <li>Has promoted or hired a critical mass of people of color into staff positions<sup>45</sup></li> </ul>	<ul> <li>Holds team members accountable by asking them to identify racial disparities in their programs</li> <li>Tracks retention and promotion rates by race on their team to identify where they need to offer professional growth and development</li> </ul>
Work	<ul> <li>Views race differences as an asset to the organization and its teams, enabling people of color to bring their full selves to work and use their lived experiences to fulfill their job responsibilities</li> <li>Shows a willingness to review personal and organizational oppression and has the tools to analyze their contribution to structural racism</li> </ul>	<ul> <li>Ensures that people of color have equal access to leadership opportunities and promotions by supporting their professional growth</li> <li>Has a promotion process that anticipates and mitigates biases about people of color serving in leadership positions</li> <li>Hires and promotes staff members who demonstrate proficiency in how to address racism and race equity with coworkers and in their programs</li> </ul>	<ul> <li>Makes race equity a performance measure during their team's annual reviews</li> <li>Has a long-term commitment to policy change based on racial disparities they see both inside and outside of the organization</li> </ul>

<sup>45</sup>Note: This is related to aspiring to have the staff reflect the composition of the community. Source: "Awake to Woke to Work: Building a Race Equity Culture," Equity in the Center. Boston, Mass: Harvard Business Press, 2009.





Part Two: Practice Equity Daily





## Part Two: Practice Equity Daily > 1. Build equity-minded culture, structures and systems. INDICATORS OF SUCCESSFULLY ENGAGED MANAGEMENT, CONT.

#### MANAGEMENT LEVER IN PRACTICE

#### **AWAKE**

#### Year Up

Added questions about diversity to performance reviews to hold individuals more accountable for progress

#### WOKE

#### Year Up

Local leadership teams developed site-specific goals to answer the question "what will make our team feel more inclusive?" Each site shared its goals with the national office and continues to track results.

#### **Leadership for Educational Equity**

Trained managers on how to coach, mentor, and manage across differences. They also disaggregate data on performance management (based on four years of data) and promotions (based on 18 months of data), and clarify management practices to ensure they're more transparent and equitable.

#### **WORK**

#### **Annie E. Casey Foundation**

Reviews diversity data collected from grantees across program units to realign strategies and goals and ensure positive race equity impact in communities served.









## Part Two: Practice Equity Daily > 1. Build equity-minded culture, structures and systems. INDICATORS OF A SUCCESSFULLY ENGAGED COMMUNITY

As you build a more equity-minded organization, focus on how your staff engages with your community. As you develop your vision for what those relationships could look like, consider the following indicators, drawn from "Awake to Woke to Work: Building a Race Equity Culture" by Equity in the Center. Their research documents a developmental pathway from "awake" (focused on representation and diversity) to "woke" (focused on inclusion) to "work" (focused on equity).

#### **COMMUNITY LEVER**

	PERSONAL BELIEFS & BEHAVIORS	POLICIES & PROCESSES	DATA
Awake	<ul> <li>Values the population served and believes they're worthy of partnership and investment</li> <li>Develops personal relationships with other community members</li> </ul>	<ul> <li>Encourages staff to volunteer in the community by providing paid time off to do so</li> <li>Values community members as informal advisors to the organization</li> </ul>	Uses data analysis to assess the racial impact of their community work
Woke	<ul> <li>Knows that the community and population served have been disenfranchised by systemic issues that were most likely not created by the people served by the organization</li> <li>Believes it's the role of the organization to help fix those inequities and injustices</li> <li>Regularly seeks community input on programs and services they provide or intend to provide</li> </ul>	<ul> <li>Has strong feedback loops to encourage and respond to community insight about race bias, diversity, and inclusion</li> <li>Has community representation at the board level, either on the board itself or through a community advisory board</li> </ul>	Disaggregates data to adjust programming and educational goals to keep pace with the changing needs of the communities they serve
Work	<ul> <li>Expects staff to work with the community to co-create solutions to problems as a key way to meet the organization's mission</li> <li>Understands that race equity will only be achieved at a systemic level through continuous interaction with the community they serve</li> <li>Is seen and valued as an ally by the community they work with</li> </ul>	<ul> <li>Invests financial resources to support race equity in their communities</li> <li>Defines criteria and processes for grant awards and partner selection using a race equity lens</li> <li>Goes beyond specific program areas to dedicate organizational time, resources, and influence to address underlying systemic issues that impact their communities</li> <li>Allies with the community on race-related issues, even when they aren't directly related to the organization's mission</li> </ul>	Measures improvement using baseline data to see if program solutions are having a positive impact







Part Two: Practice Equity Daily







## Part Two: Practice Equity Daily > 1. Build equity-minded culture, structures and systems. INDICATORS OF A SUCCESSFULLY ENGAGED COMMUNITY, CONT.

#### MANAGEMENT LEVER IN PRACTICE

#### **AWAKE**

#### **Annie E. Casey Foundation**

Encourages staff to volunteer their time to work on race equity goals in the communities they serve

#### Leadership for Educational Equity

Disaggregated member program goals to ensure that investments in members of color are prioritized

#### **WOKE**

#### Year Up

Held conversations with stakeholders to identify the community's perspective on how well Year Up was doing in terms of its diversity efforts

#### Leadership for Educational Equity

Created identity-based resource groups that meet to discuss experiences and identify organizational actions to support them

#### **WORK**

#### **Annie E. Casey Foundation**

Defined the work of race equity—and the organization's need to internally understand and embrace it—as "mission-critical." Made a clear connection between internal/external equity work and the foundation's overall outcomes.

#### Leadership for Educational Equity: Examines

disaggregated data about the onboarding experience, performance management, compensation, and retention. Identified disparities to trigger deeper work to align policies and strategies.





## Part Two: Practice Equity Daily > 1. Build equity-minded culture, structures and systems. INDICATORS OF SUCCESSFULLY BUILDING THE LEARNING ENVIRONMENT

To advance race, equity and inclusion in your organization, you need to create an environment where everyone is a learner, where insights are shared and where both successes and failures can generate insight. This is not always easy work but resistance only makes it harder and more awkward. As you build your learning environment, consider the following indicators, drawn from "Awake to Woke to Work: Building a Race Equity Culture" by Equity in the Center. Their research documents a developmental pathway from "awake" (focused on representation and diversity) to "woke" (focused on inclusion) to "work" (focused on equity).

### **LEARNING ENVIRONMENT LEVER**

	PERSONAL BELIEFS & BEHAVIORS	POLICIES & PROCESSES	DATA
Awake	Focuses on increasing staff knowledge about the individual and interpersonal levels of racism (e.g., individual biases, intercultural communication and conflict skills)	<ul> <li>Has or is developing a shared language around race identity and issues related to race, racism, and race equity</li> <li>Has or is building cross-cultural awareness, sensitivity, and empathy, including education about dominant identities that exist in organizational cultures</li> </ul>	<ul> <li>Includes demographics in evaluation methods to collect race-conscious data on program/training efficacy</li> <li>Tracks number of employees who participate in DEI trainings and amount of conversation around dominant culture and race equity</li> </ul>
Woke	<ul> <li>Expects members of the dominant culture to acknowledge and reduce the emotional labor placed upon people of color within the organization regarding race-related discussions</li> <li>People of color understand and acknowledge their colleagues' learning journeys around race, racism, and racial equity</li> </ul>	<ul> <li>Helps senior leadership understand how to be inclusive leaders with learning approaches that emphasize reflection, iteration, and adaptability</li> <li>Supports teams to improve their skills to work across differences and uses constructive conflict to inspire better thinking and solutions</li> </ul>	<ul> <li>Employs non-traditional ways to gather feedback on programs and trainings, which may include interviews, roundtables, and external reviews</li> <li>Seeks input from people of color to create and iterate learning objectives and measurement strategies</li> <li>Collects data on effectiveness of DEI trainings and conversations (in addition to participation numbers); conducts reviews from participants to share key insights and learnings with teams or full organization</li> </ul>
Work	Critically reflects on progress and intentionally works to sustain race equity	<ul> <li>Increases staff knowledge about race equity and facilitates difficult conversations related to race and racism</li> <li>Learns how to impact structural racism issues outside the organization and in the communities they serve</li> </ul>	<ul> <li>Uses data to change culture and processes, and shows a willingness to make large-scale changes based on needs referenced by staff</li> <li>Allows for multiple entry points and ways of engaging with race equity work by tailoring the use of internal and external race equity/DEI data for individual employee motivations</li> <li>Formulates development and learning plans for race equity knowledge; tracks employee learnings and any resistance to growth</li> <li>Talks freely about key organizational learnings around race equity and their journey</li> </ul>





Part Two: Practice Equity Daily







## Part Two: Practice Equity Daily > 1. Build equity-minded culture, structures and systems. INDICATORS OF SUCCESSFULLY BUILDING THE LEARNING ENVIRONMENT, CONT.

### LEARNING ENVIRONMENT LEVER IN PRACTICE

### **AWAKE**

### **Leadership for Educational Equity**

Developed a core fundamentals curriculum and implemented it for all teams to better understand race and racism

### WOKE

### Year Up

As a part of their 360 review, each senior leader gets feedback on how effective they are at managing diversity on their teams. Based on that feedback, leaders receive coaching on how to be a more inclusive leader and/or lead inclusive teams. Additionally, white staff are trained as "allies," both to support and model how to facilitate race dialogue within teams and learn how to effectively introduce topics that people of color have expressed they are not comfortable raising publicly.

### **WORK**

### Leadership for Educational Equity

Trains leadership on how to best support and advocate for people across identities (e.g., race, gender, ability, sexual orientation)





Part One: Get Ready Part Two: Practice Equity Daily Workbook





## Part Two: Practice Equity Daily > 1. Build equity-minded culture, structures and systems. INDICATORS OF SUCCESSFULLY SHIFTING ORGANIZATIONAL CULTURE

Organizational culture requires explicit attention. As you build a more equity-minded culture, you'll want to deepen the skills and willingness of your staff to raise tough questions bravely, explore challenging issues productively, allow for decisions that are not always hierarchically determined, and deepen relationships and mutual respect. As you think about what that culture could look and feel like, consider the following indicators, drawn from "Awake to Work" by Equity in the Center. Their research documents a developmental pathway from "awake" (focused on representation and diversity) to "woke" (focused on inclusion) to "work" (focused on equity).

### ORGANIZATIONAL CULTURE LEVER

	PERSONAL BELIEFS & BEHAVIORS	POLICIES & PROCESSES	DATA
Awake	<ul> <li>Is aware that a white dominant workplace culture exists, but expects people to adhere to dominant organizational norms in order to succeed</li> <li>Is learning to address challenges that occur in diverse environments as a result of unconscious biases and microaggressions that create conflict and resentment among staff</li> </ul>	Shares the organization's commitment to DEI as part of the onboarding process of new employees	Emphasizes increasing diverse staff representation over addressing retention issues
Woke	Is compelled to discuss racially charged events with their staff when they occur and hold space for their staff to process their feelings without placing undue responsibility on people of color to explain or defend themselves or their communities	<ul> <li>Considers ways to shift organizational norms and team dynamics in order to support racially diverse staff whose lived experiences meaningfully contribute to the organizational mission</li> <li>Expects participation in race equity work across all levels of the organization</li> </ul>	Has long-term strategic plans and measurable goals for creating an equity culture and an understanding of the organizational change needed to realize it
Work	<ul> <li>Communicates proactively around race equity values and initiatives, both internally and externally</li> <li>Fosters a positive environment where people feel they can raise race-related concerns about policies and programs without experiencing negative consequences or risking being labeled a "troublemaker"</li> </ul>	<ul> <li>Engages everyone in organizational race equity work and ensures that individuals understand their role in creating an equitable culture</li> <li>Threads accountability across all efforts to support and sustain a racially equitable organization</li> </ul>	Assesses achievement of social inclusion through employee engagement surveys







Part Two: Practice Equity Daily







## Part Two: Practice Equity Daily > 1. Build equity-minded culture, structures and systems. INDICATORS OF SUCCESSFULLY SHIFTING ORGANIZATIONAL CULTURE, CONT.

### ORGANIZATIONAL CULTURE LEVER IN PRACTICE

### **AWAKE**

### **Leadership for Educational Equity**

Established a DEI team to set a vision and define positions, language and curriculum to achieve it

### Year Up

Created a design team comprised of a cross-section of staff that was racially and functionally diverse. Team met regularly for "deep dives" to improve DEI knowledge

### WOKE

### Leadership for Educational Equity

Created identity-based employee resource groups that invited cross-functional staff to discuss their experiences and identify actions the organization can take to support them

### Year Up

Held conversations with senior leadership to create clear definitions for diversity and inclusion prior to writing a diversity statement

### **WORK**

### Annie E. Casey Foundation:

Defined the work of race equity, as well as the organizations needed to internally understand and embrace it as mission-critical. Makes a clear and explicit connection between their equity work and the foundation's overall outcomes





Part Two: Practice Equity Daily







## Part Two: Practice Equity Daily > 1. Build equity-minded culture, structures and systems. SHIFTING ORGANIZATIONAL STRUCTURE AND OPERATIONS

People working in mission support functions such as administration, finance, information technology and operations will often wonder how they can contribute to race, equity and inclusion goals within your organization. Their role is also critical because equity change work needs to be lived and felt throughout the organization, regardless of role. Use the resources in this section to explore ways that they can take initiative as well as provide support to programmatic efforts.

### Advancing the Mission: Tools for Equity, Diversity and Inclusion

Annie E. Casey Foundation

This comprehensive resource includes a practical section called "Hard-Wiring for Socially Responsible Operations" (pages 82-86).

### Contracting for Equity: Best Local Government Practices that Advance Racial Equity in Government Contracting and Procurement

Government Alliance on Race and Equity

While this resource is directed toward local governments, it has much to offer all types of organizations and companies.

### Decentering Whiteness and Creating Inclusive and Equitable Conferences: A Tip Sheet

This tip sheet was created by a working group of social justice activists to help conference organizers create more equitable and inclusive conferences.

### **Guidelines for Promoting Racially Equitable Purchasing**

This short report offers a three-step plan to grow your vendor pool and sustain vendor diversity.

Notes	





## Part Two: Practice Equity Daily > 1. Build equity-minded culture, structures and systems. INDICATORS OF SUCCESSFULLY GATHERING AND USING DATA

Working on race, equity and inclusion requires careful attention to data that can reveal which populations are most likely to confront barriers to opportunity (both within your United Way and the community) and how your efforts are making a difference. As you explore ways to enhance your capacity to gather, analyze and use data to inform decision making, consider the following indicators, drawn from "Awake to Woke to Work" by Equity in the Center. Their research documents a developmental pathway from "wake" (focused on representation and diversity) to "woke" (focused on inclusion) to "work" (focused on equity).

### **DATA LEVER**

	PERSONAL BELIEFS & BEHAVIORS	POLICIES & PROCESSES	DATA
Awake	<ul> <li>Believes that successful diversity means increasing the number of racially diverse people on staff</li> <li>Is not convinced that measuring internal data (such as hiring/retention) based on race/ethnicity matters, but understands the value of data analysis to the work of the organization in general</li> </ul>	<ul> <li>Focuses on the number of employees hired and retained by race/ethnicity</li> <li>Focuses on internal promotion or advancement for people of color</li> </ul>	Tracks interventions from HR or other parties to mediate conflicts and misunderstandings based on race differences
Woke	<ul> <li>Supports implementation of new, race-conscious ways to measure initiatives, programs, and internal processes</li> <li>Collects relevant data on internal indicators of diversity/inclusion in hiring and retention</li> <li>Has a baseline of data indicators that inform the organization of where it can focus efforts</li> </ul>	<ul> <li>Measures job applicants by their level of understanding, skill, and attributes related to diversity and race equity</li> <li>Measures job satisfaction and retention by function, level, and team</li> </ul>	<ul> <li>Disaggregates data by demographics such as race in every policy and program measured</li> <li>Monitors the level of employee engagement and satisfaction from working in an inclusive culture</li> <li>Creates metrics and measures with input from people of color</li> <li>Tracks and publishes race representation statistics among their workforce, grantees, consultants, and vendors</li> </ul>
Work	<ul> <li>Uses data proactively to inform and create their strategies and new initiatives</li> <li>Understands that internal and external data analysis is imperative to building a race equity culture because it establishes internal and external transparency, and allows employees who enter their work with a race equity lens to interact and engage</li> <li>Uses data and measurement in storytelling around their race equity journeys</li> </ul>	Assesses alignment between strategy metrics and equity values	<ul> <li>Measures cultural responsiveness of their policies and programs for employees, stakeholders, and communities</li> <li>Tracks coordinated diversity activities that align with organizational direction</li> <li>Measures race equity data by using both quantitative and qualitative data and holds the organization accountable to improve its impact</li> <li>Uses evaluation tools for race equity, including assessments, to examine equity work internally and in external partnerships</li> </ul>





Part Two: Practice Equity Daily







## Part Two: Practice Equity Daily > 1. Build equity-minded culture, structures and systems. INDICATORS OF SUCCESSFULLY GATHERING AND USING DATA, CONT.

### **DATA LEVER IN PRACTICE**

### **AWAKE**

### **Leadership for Educational Equity:**

Established internal goal to racially diversify their staff to more closely mirror the diversity in their community

### WOKE

### Leadership for Educational Equity

Administers a 90-day onboarding survey to gather feedback on staff experience working in an inclusive environment. Administers an employee satisfaction survey twice annually that is disaggregated by race and gender

### Annie E. Casey Foundation

Retained a vendor for an office improvement project whose economic inclusion strategy includes hiring ex-offenders and other hard-to-place employees

### **WORK**

### Leadership for Educational Equity:

Reviewed current strategic goals through a race equity lens to identify areas where they could create more identity-based programming for staff and stakeholders. Measures whether identity-based leadership development efforts produce more racially diverse leaders in the education sector.





Part Two: Practice Equity Daily







### **Dismantling Anti-Black Racism in Democratic Workplaces: A Toolkit**

### **AORTA Cooperative**

A 28-page toolkit full of easy-to-use activities and guidance on when each activity could be used. It moves from understanding the concept of anti-Black racism to mapping its presence in your organization to activities focused on shifting workplace culture and practices.

### Infiltration: How the values of oppressive systems tend to arise in organizations (and what to do about it)

### **AORTA Cooperative**

An introductory article that starts by listing how various systems of oppression show up in organizations, followed by a set of discussion questions and a few examples for interrupting oppressive behavior and making changes in your organization

### **Guidelines for More Equitable Purchasing**

Race Matters Institute

This four-page PDF guide, published in 2006 as part of the Race Matters Toolkit, outlines a clear, three-step strategy for helping organizations make more racially equitable purchasing decisions.

### **Manifestations of White Supremacy Culture**

Tema Okun, dRworks Collective

This short article lists common examples of white supremacy culture in workplaces, such as "sense of urgency," "quantity over quality," "fear of open conflict," and "worship of the written word." Each list is followed by antidotes or ideas about how to counter these behaviors.

### **Racial Equity Impact Assessment**

Race Forward

This tool provides a systematic way to assess current organizational policies and practices and analyze potential new policies and practices.

### **Wheel of Change Overview**

The Social Transformation Project

This framework offers insights into the process of changing organizations by changing hearts and minds, systems, and structures and behaviors and norms.

Notes			







## Part Two: Practice Equity Daily > 2. Nurture a diverse, equity-minded workforce. SAMPLE STAFF CORE COMPETENCIES

Creating a shared set of expectations is a useful step toward creating a diverse, equity-minded workforce. This Staff Competencies matrix was developed by the Center for the Study of Social Policy for its own staff. It describes competencies for all staff roles. It is an example of the kind of matrix you could create for your United Way. Consider beginning with a set of core competencies for all staff and then add specific competencies related to specific roles within your organization. You'll also want to develop or identify professional development of the core competencies for all staff and then add specific competencies related to specific roles within your organization. You'll also want to develop or identify professional development of the core competencies for all staff and then add specific competencies related to specific roles within your organization. opment resources to support staff in gaining the competencies.

### CSSP STAFF CORE COMPETENCIES FOR WORKING TO ACHIEVE RACIAL EQUITY

Sub-Domain	Competency
	Understanding why racial equity is a part of CSSP's Theory of Change (TOC) and the rationale for CSSP's desired racial equity outcomes
	<ul> <li>Understanding CSSP's analytical and action framework for working to achieve racial equity.</li> </ul>
	<ul> <li>Understanding core constructs such as structural racism, equity, justice, White privilege, internalized oppression, antiracism, etc.</li> </ul>
Foundational Knowledge	<ul> <li>Understanding how race-based privilege and power has contributed to "the range of barriers to equal opportunity and the depth of embedded racial inequities" how they were created, are currently reinforced and maintained, and can be removed.</li> </ul>
and Core Skills	• Understanding relevant amendments, laws, regulations, and policies (e.g., 14th amendment, Federal Indian Policy, immigration policies).
	• Examining relevant "real-time" issues (e.g., stereotype threat and the murder of African Americans; debate regarding immigration policies).
	Understanding what a reduction in institutional and structural racism look like (i.e., outcomes).
	Understanding the specific areas of racial disparity of focus for the organization.
	Understanding and practicing the organization's values.
	<ul> <li>Knowing basic data/metrics about the scope, extent of, and the economic and human costs of racial inequities, with particular attention to the communities of focus.</li> </ul>
	Understanding how racial equity is a core objective in one's area of work.
Data	<ul> <li>Understanding within one's area of work how race-based privilege and power has contributed to "the range of barriers to equal opportunity and the depth of embedded racial inequities"—how they were created, are currently reinforced and maintained, and can be removed.</li> </ul>
	Understanding the specific areas of racial disparity of focus for the respective work team.
	Understanding what racial equity will "look like" with respect to the work team's areas of focus.





Part Two: Practice Equity Daily







# Part Two: Practice Equity Daily > 2. Nurture a diverse, equity-minded workforce. SAMPLE STAFF CORE COMPETENCIES, CONT.

DOMAIN: SKILLS	
Sub-Domain	Competency
Analytical	<ul> <li>Critically examining social issues and messages for racial biases and inequities and their impact on oneself and others' thinking, emotions, and behaviors.</li> <li>Developing strategies for working to achieve racial equity through one's work.</li> <li>Disaggregating data by race in all analyses.</li> <li>Identifying areas in work where a racial equity analysis could/should be applied to advance the work to eliminate racial disparities and inequities.</li> <li>Including in written materials relevant issues about barriers to opportunity and embedded racial inequities</li> </ul>
Practice	<ul> <li>Applying a racial equity lens in policy issues.</li> <li>Applying a racial equity lens in practice issues.</li> </ul>
Facilitation	<ul> <li>Facilitating discussions about racial equity (difficult issues involving race).</li> <li>Learning how to create a "safe space" that encourages people to open up and feel comfortable enough to discuss difficult issues.</li> </ul>
Communication	<ul> <li>Communicating effectively with colleagues and refining interpersonal communication skills, in general.</li> <li>Communicating effectively about issues related to racial equity.</li> <li>Developing non-violent communication skills (e.g., empathy and compassion movement).</li> <li>Developing active listening skills</li> </ul>





Part Two: Practice Equity Daily







# Part Two: Practice Equity Daily > 2. Nurture a diverse, equity-minded workforce. SAMPLE STAFF CORE COMPETENCIES, CONT.

DOMAIN: ATTITUDES	
Sub-Domain	Competency
	<ul> <li>Appreciating the need to practice cultural humility in one's life and work. That is, careful consideration of one's own assumptions, beliefs, emotions, and behaviors that are embedded in one's understandings and goals when interacting with individuals of different races or cultures.</li> </ul>
	<ul> <li>Examining and reflecting on one's own racial/ethnic biases/prejudices that may impact one's work.</li> </ul>
Self-Reflection	<ul> <li>Acknowledging one's racial or cultural "blind spots" and working to address them.</li> </ul>
	<ul> <li>Feeling comfortable and competent to express racial equity and race inequity opinions even if they differ from the majority.</li> </ul>
	<ul> <li>Disagreeing regarding racial equity issues and their intersections without being defensive and criticizing others' point of view.</li> </ul>
	Thinking/talking about individual issues in being self-aware/mindful about racial equity issues.
	Thinking/talking about individual issues in being self-aware/mindful about racial equity issues.



Part Two: Practice Equity Daily



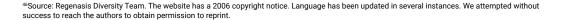


Part Two: Practice Equity Daily > 2. Nurture a diverse, equity-minded workforce.

### HR POLICIES AUDIT CHECKLIST<sup>46</sup>

This checklist is a self-assessment that will enable you to look at your HR policies and procedures and confirm if equality of opportunity is practiced and discrimination is eliminated within your organization. To ensure you get an accurate assessment and highlight areas that need improvement, it's important for you to be honest in your answers.

SECTION 1   RECRUITMENT & SELECTION Advertising	Yes	Sometimes	No
Advertise in plenty of time prior to the interview and selection process	2 pts	O 1 pt	O pts
2. Advertise using a wide range of sources	O 3 pts	O 2 pts	O pts
3. Give details about the necessary skills and qualifications required	O 3 pts	O 2 pts	O pts
4. Indicate a salary range	O 2 pts	O 1 pt	O pts
5. State that you're an equal opportunity employer	O 3 pts	2 pts	O pts
6. State that flexible working arrangements are available	O 3 pts	2 pts	O pts
7. Provide the opportunity for applicants to informally discuss the post	O 2 pts	O 1 pt	O pts
8. State the location of the post	O 2 pts		O pts
9. State that you welcome applicants with disabilities	O 3 pts	O 2 pts	O pts
10. State that you welcome applicants from underrepresented racial and ethnic groups	O 3 pts	O 2 pts	O pts
11. Use wording that would not discriminate against specific age groups	O 2 pts		O pts
ADVERTISING TOTAL			







Part Two: Practice Equity Daily







# Part Two: Practice Equity Daily > 2. Nurture a diverse, equity-minded workforce. HR POLICIES AUDIT CHECKLIST, CONT. 46

Job descriptions Are your job descriptions:	Yes	Sometimes	No
1. Clear and comprehensive, including all major tasks and responsibilities	O 2 pts	O 1 pt	O pts
2. Written in a standard format to enable valid comparisons to be made	O 3 pts	O 2 pts	O pts
3. Checked and agreed on by the relevant internal people	O 3 pts	O 2 pts	O pts
4. Extensive enough to cover the skills and knowledge applicants will require without breaking any anti-discrimination laws	O 3 pts	O 2 pts	O pts
5. Based on competencies needed to do the job, without using credentials as a proxy	O 3 pts	O 2 pts	O pts
JOB DESCRIPTIONS TOTAL			







# Part Two: Practice Equity Daily > 2. Nurture a diverse, equity-minded workforce. HR POLICIES AUDIT CHECKLIST, CONT. 46

Applications When designing your application form and procedures, do you:	Yes	Sometimes	No
1. Ask for only essential personal details: name, address, and telephone number	O 2 pts	O 1 pt	O pts
2. Tell candidates the purpose of the equal opportunities monitoring form	O 2 pts	O 1 pt	O pts
3. Invite candidates to demonstrate how their experience and skills meets the job specifications	O 3 pts	O 2 pts	O pts
4. Assess candidates' applications based on their experience, knowledge, and competencies rather than their characteristics and background	O 4 pts	O 2 pt	O 1 pt
5. Ask candidates if they need any accommodations for the interview	O 4 pts	O 2 pt	O 1 pt
6. Give a specific deadline for application submission	O 2 pts	O 1 pt	O pts
7. Provide clear instructions about how to complete the application	O 1 pt	0.5 pt	O pts
8. Give candidates plenty of notice when scheduling interview dates and times	O 1 pt	0.5 pt	O pts
9. Acknowledge receipt of applications in writing	O 1 pt	0.5 pt	O pts
APPLICATIONS TOTAL			

<sup>46</sup>Source: Regenasis Diversity Team. The website has a 2006 copyright notice. Language has been updated in several instances. We attempted without success to reach the authors to obtain permission to reprint.





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HR POLICIES AUDIT CHECKLIST, CONT. <sup>46</sup>

Short listing/screening Does your shortlisting/screening process for candidates include:	Yes	Sometimes	No
A panel that has a good understanding of the application process and ways to ensure that it is objective and unbiased	O 2 pts	O 1 pt	O pts
2. A structured system for scoring applications based on evidence presented in the application form	O 2 pts	O 1 pt	O pts
3. Reviews at the end of the scoring process to ensure no one member of the panel is biased against an individual candidate	O 2 pts	O 1 pt	O pts
SHORT LISTING/SCREENING TOTAL			





Part Two: Practice Equity Daily







# Part Two: Practice Equity Daily > 2. Nurture a diverse, equity-minded workforce. HR POLICIES AUDIT CHECKLIST, CONT. 46

Interviewing Do you consider the following when interviewing applicants?	Yes	Sometimes	No
1. An initial telephone interview	O 1 pt	0.5 pt	O pts
2. Making appropriate arrangements for applicants with disabilities	O 2 pts	O 1 pt	O pt
3. The mix of people who sit on the interview panel, including a member of the HR team	O 1 pt	0.5 pt	O pts
4. Equal coverage of the same topics and issues with each of the applicants	O 3 pts	O 2 pts	O pts
5. Asking questions about the candidate's earned experience that relates to the requirements of the job	O 3 pts	2 pts	O pts
6. Avoiding questions about birthplace, nationality, race, color, gender, religion, sex, marital status, age, or childcare responsibilities	O 4 pts	O 2 pts	O 1 pt
7. Not asking questions of a woman that you would not ask of a man	O 2 pts	O 1 pt	O pt
INTERVIEWING TOTAL			

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# Part Two: Practice Equity Daily > 2. Nurture a diverse, equity-minded workforce. HR POLICIES AUDIT CHECKLIST, CONT. 46

SECTION 2 Progression and Promotion Does your organization encourage the progression of employees by:	Yes	Sometimes	No
1. Having a written policy stating a commitment to internal training and development	2 pts		O pt
2. Offering temporary positions in another part of the organization for career development, temporary opportunities to take on an acting role at a higher level of responsibility, or opportunities to take on additional responsibilities to gain experience	O 3 pts	O 2 pts	O pts
3. Having a transparent and clear progression system that's widely advertised	O 3 pts	O 2 pts	O pts
4. Giving constructive feedback to internal applicants (both successful and unsuccessful)	O 3 pts	O 2 pts	O pts
5. Assisting unsuccessful internal applicants in identifying knowledge and skill gaps and providing appropriate training, coaching, or mentoring to address them	O 2 pts	O 1 pt	O pt
6. Having positive action plans for underrepresented groups in senior positions (e.g., women and ethnic minorities)	O 3 pts	O 2 pts	O pts
PROGRESSION AND PROMOTION TOTAL			





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### HR POLICIES AUDIT CHECKLIST, CONT. 46

### **SECTION 3** Yes **Sometimes** No **Pay Banding** Does your organization take into consideration the following legal requirements: 1. Pay employees in accordance with the salary specified in their employment contract 0 pts 2. Ensure equal pay for men and women doing similar work or work of equal value 3. Do not make salary deductions without prior written agreement (except where required or authorized by law or employees' contracts) 0 pts 4. Give clear guidance to all employees on their statutory entitlements for maternity, paternity, and adoption pay; sick pay; and severance pay 0 pts 5. Give all employees clear and transparent guidance on policies for receiving pay raises or bonuses 0 pts 6. Meet requirements of the Minimum Wage Act 0 pts **PAY BANDING TOTAL**



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Workbook





# Part Two: Practice Equity Daily > 2. Nurture a diverse, equity-minded workforce. HR POLICIES AUDIT CHECKLIST, CONT. 46

### SECTION 4 | WORKING PRACTICES AND PROCEDURES

SECTION 4   WORKING PRACTICES AND PROCEDURES  Training & Development  Do your internal training procedures encourage employees to develop their skills by:	Yes	Sometimes	No
1. A robust onboarding process that fully integrates new employees into the organization	O 1 pt	0.5 pt	O pts
Using the onboarding process to raise awareness about employees' responsibilities     to eliminate discrimination in the workplace	O 2 pts	O 1 pt	O pt
3. Having a consistent approach to training for all employees	O 2 pts	O 1 pt	O pt
4. Identifying training needs through a structured appraisal process	O 4 pts	O 2 pts	O 1 pt
5. Making the application process for training accessible to all employees	O 1 pt	0.5 pt	O pts
6. Ensuring all managers are aware of their responsibility to allow employees time for training and development opportunities	O 1 pt	0.5 pt	O pts
7. Using resources in a targeted and effective way	O 1 pt	0.5 pt	O pts
TRAINING & DEVELOPMENT TOTAL			





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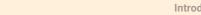
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### HR POLICIES AUDIT CHECKLIST, CONT.46

Challenging perceptions It's essential to challenge any negative perceptions in the workplace. Does your organization address prejudices by:	Yes	Sometimes	No
1. Providing training or raising awareness about the business benefits of a diverse workforce	O 2 pts	O 1 pt	O pts
2. Offering employees who are responsible for recruiting guidance on the effects that generalized assumptions and prejudices can have on hiring selection and decisions	O 3 pts	O 2 pts	O pts
3. Incorporating equal opportunities and diversity practices into day-to-day activities to eliminate prejudice and bias	O 3 pts	O 2 pts	O pts

**CHALLENGING PERCEPTIONS TOTAL** 





Part Two: Practice Equity Daily







# Part Two: Practice Equity Daily > 2. Nurture a diverse, equity-minded workforce. HR POLICIES AUDIT CHECKLIST, CONT. 46

Equal opportunities policy  Does your organization have a policy that states a commitment to equal opportunities, in particular:	Yes	Sometimes	No
1. Your organization's values on equality opportunities and how they will be put into practice	O 5 pts	2 pts	O pts
2. Areas of discrimination that your organization will counter (e.g., race, gender, disability)	O 5 pts	O 2 pts	O pts
3. An action plan with clear, measurable objectives and targets to back up the equal opportunities policy	5 pts	O 2 pts	O pts
4. A statement on how, why, and when the monitoring of the workforce is undertaken	5 pts	O 2 pts	O pts
5. A statement on how the policy will be reviewed and updated	◯ 5 pts	O 2 pts	O pts
6. An expressed aspiration to attain a workforce that represents the communities surrounding or served by your organization	O 5 pts	O 2 pts	O pts
EQUAL OPPORTUNITIES POLICY TOTAL			

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# Part Two: Practice Equity Daily > 2. Nurture a diverse, equity-minded workforce. HR POLICIES AUDIT CHECKLIST, CONT. 46

Dignity at work  Has your organization implemented any of the following procedures or support systems to address workplace bullying and harassment:	Yes	Sometimes	No
1. Advice for employees on the correct way to make an informal or formal complaint	O 2 pts	O 1 pt	O pts
2. A clearly written disciplinary process to deal with complaints	O 4 pts	O 2 pts	O pts
3. Trained mediators to resolve conflicts and disputes informally	O 2 pts	O 1 pt	O pts

**TOTAL** 





Part Two: Practice Equity Daily







# Part Two: Practice Equity Daily > 2. Nurture a diverse, equity-minded workforce. HR POLICIES AUDIT CHECKLIST, CONT. 46

Flexible working practices  Do you offer any of the following flexible working practices to your employees?	Yes	Sometimes	No
Flexi-time, allowing people to choose the hours they work     (i.e., vary the start, break, and finish times of their working days)	O 2 pts	O 1 pt	O pt
2. Reduced work hours, offering employees the option of a part-time schedule	2 pts	O 1 pt	O pt
3. Time off in lieu of any overtime worked	O 2 pts	O 1 pt	O pt
4. Staggered hours	O 2 pts	O 1 pt	O pt
5. Compressed work hours, allowing employees to work their contracted hours over a shorter period of days	O 2 pts	O 1 pt	O pt
6. Job sharing	O 2 pts	O 1 pt	O pt
7. Telecommuting/working from home	O 2 pts	O 1 pt	O pt
TOTAL			

<sup>46</sup>Source: Regenasis Diversity Team. The website has a 2006 copyright notice. Language has been updated in several instances. We attempted without success to reach the authors to obtain permission to reprint.





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ਰ ਰ	HR POLICIES AUDIT CHECKLIST, CONT. 46

Scoring - Questions SECTION 1	Score
A diversion or	Score
Advertising	
Job descriptions	
Applications	
Short listing/screening	
interviewing	
SECTION 2	
Progression and Promotion	
SECTION 3	
Pay Banding	
SECTION 4	
Training & Development	
Challenging perceptions	
Equal Opportunities Policy	
Dignity at work	
Flexible working practices	

<sup>46</sup>Source: Regenasis Diversity Team. The website has a 2006 copyright notice. Language has been updated in several instances. We attempted without success to reach the authors to obtain permission to reprint.

**OVERALL SCORE:** 





Part Two: Practice Equity Daily







## Part Two: Practice Equity Daily > 2. Nurture a diverse, equity-minded workforce. HR POLICIES AUDIT CHECKLIST, CONT. 46

### **RESULTS**

### Gold-175 to 200

Well done! Your organization is fully committed to diversity in the workplace and should continue the good work.

### Silver-175 to 150

Your organization shows some commitment to diversity but may benefit from a diversity audit.

### Bronze-150 to 100

Your organization would fully benefit from a full diversity audit and should look at its HR policies and procedures to actively encourage diversity in the workplace.

### At risk-100 to 0

Your organization may have employment policies and practices that are discriminating against both existing and potential employees.











## Part Two: Practice Equity Daily > 2. Nurture a diverse, equity-minded workforce. TOOLS FOR A DEEPER DIVE

### **DIVERSITY, INCLUSION AND TALENT**

### Race to Lead: Confronting the Racial Leadership Gap

**Building Movement Project** 

This series of research reports highlights how women and people of color are experiencing barriers to leadership in the nonprofit sector. It also includes guidance about how to remove some of these

### Why Diversity and Inclusion Has Become a Business Priority

Josh Bersin

This article describes research focused on "128 different aspects of talent management [and] ... found 31 distinct talent practices which are highly correlated with strong business performance."

### RECRUITMENT, HIRING AND RETENTION

### **Hiring: Building the Team You Want**

**AORTA Cooperative** 

This toolkit offers extensive step-by-step guidance on establishing and training your hiring committee, promoting your job announcement and organizing each step from screening and interviewing to hiring. It also includes a detailed resource of questions that interviewers can/cannot legally ask.

### **Peer Evaluations: Getting Better Every Year**

**AORTA** Cooperative

This toolkit explores the "why" of employee evaluations and the "how" of peer evaluations as an equitable strategy for fostering individual growth and building stronger team culture.

### Equity, Diversity and Inclusion in Recruitment, Hiring and Retention

Desiree Williams-Rajee, Kapwa Consulting for Urban Sustainability Directors Network

This is a comprehensive guide for "hiring managers seeking to diversify their sustainability staff by applying an equity lens." It contains practical guidance on recruitment, hiring, retention and institutionalizing race, equity and inclusion efforts.

### **Equitable Hiring Tool**

Racial Equity and Social Justice Initiative, City of Madison, Wisconsin

This tool includes a series of questions and worksheets to ensure you include equity considerations in your position description, experience requirements, recruitment and advertising, interview questions, interviewing and candidate selection. While developed by a municipal government, the toolkit has broader relevance, though you may skip over the section on civil service exams.

### Managing Unconscious Bias: Strategies to Manage Bias & Build More Diverse, Inclusive Organizations

Paradiam

This paper outlines the impact of bias on attracting, hiring, developing and retaining diverse employees. It also offers strategies and practices for debiasing each of these areas.





Part Two: Practice Equity Daily







# Part Two: Practice Equity Daily > 2. Nurture a diverse, equity-minded workforce. TOOLS FOR A DEEPER DIVE, CONT.

### RECRUITMENT, HIRING AND RETENTION, CONT.

### **Six Steps to Hiring More Diverse Candidates**

Kayla Kozan

This brief article offers simple steps to get started with identifying diversity hiring metrics and hiring more diverse candidates.

### **Textio**

An online tool for writing bias-free job postings/descriptions and other written materials.



Also, see the section on building common language for training tools.



Part Two: Practice Equity Daily





## Part Two: Practice Equity Daily > 3. Nurture a diverse, equity-minded board. CULTIVATING EQUITY-MINDED BOARD MEMBERS

### Equity-minded board members are:

- · Committed to race, diversity and inclusion as an ongoing priority, not a short-term initiative
- · Willing to learn and share about how race, diversity and inclusion matter to them as individuals as well as to the organization
- · Able to communicate in ways that reflect the needs of underrepresented segments of the community
- · Willing to address these issues as part of their role as a board member, including
  - > Formal assessments of the board and organization's culture to identify strengths and barriers to inclusion
  - > Action planning to address discriminatory or non-inclusive behaviors and help the board become more diverse and inclusive
- · Consistent in volunteering at events that build their understanding of community perspectives

As you deepen the equity-mindedness of your board members, here are some indicators of progress.

Notes		









# Part Two: Practice Equity Daily > 3. Nurture a diverse, equity-minded board. CULTIVATING EQUITY-MINDED BOARD MEMBERS, CONT.

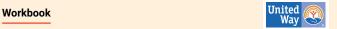
### **BOARD OF DIRECTORS LEVER**

	PERSONAL BELIEFS & BEHAVIORS	POLICIES & PROCESSES	DATA
Awake	May not be comfortable discussing issues tied to race at the board level	<ul> <li>Seek individuals from various race backgrounds for board and executive director/CEO positions</li> <li>Show a commitment, at every level of the organization, to diverse representation and hold the organization accountable for diversity policies and practices</li> </ul>	Have limited understanding about race disparities in the populations served by their organizations
Woke	Create and sustain practices (e.g., shared norms, vision, values, policies) to foster an inclusive environment that encourages and values differing viewpoints in decision-making process	<ul> <li>Have a critical mass of people of color on the board, including in leadership roles</li> <li>Evaluate board membership requirements that ignore systemic racial inequities and reinforce dominant culture, such as minimum donation amounts and conventionally prestigious backgrounds</li> <li>Acknowledge and manage power dynamics that exist on the board, and how decision making may be impacted by biases</li> </ul>	Analyze disaggregated data and root causes of race disparities that impact the organization's programs and the populations they serve
Work	Lead internal processes, procedures, and culture to eliminate bias and disparate treatment	<ul> <li>Show a willingness to review personal and organizational oppression, and have the tools to analyze their contribution to structural racism</li> <li>Commit fully to building a race equity culture and holding the organization accountable for race equity policies and practices</li> <li>Adapt their missions to engage and empower communities to work with the organization to achieve shared community advancement and benefit</li> </ul>	Hold the executive director/CEO accountable for all measures related to CEO performance on race equity, ensuring financial resources are allocated to support the work





Part Two: Practice Equity Daily





## Part Two: Practice Equity Daily > 3. Nurture a diverse, equity-minded board. CULTIVATING EQUITY-MINDED BOARD MEMBERS, CONT.

### **BOARD OF DIRECTORS LEVER IN PRACTICE**

### **AWAKE**

### Year Up

Conducted a review of its board member selection process and, based on the outcomes, revamped the composition of the board to include racially diverse alumni from its programs—with the express purpose of providing a unique perspective andskill sets

### WOKE

### Year Up

Board engaged in its own learning about DEI and the organization created a special task force comprised of board members and staff who reviewed board policies and outlined recommendations for change

### WORK

### Year Up

Added trainings on diversity and inclusion to the board onboarding process so every board member had the same base level of DEI knowledge. The board's quarterly learning sessions are focused on different diversity topics, including systemic racism and privilege, related to Year Up's work and students served.





Part Two: Practice Equity Daily







## Part Two: Practice Equity Daily > 3. Nurture a diverse, equity-minded board. **BOARD COMPOSITION MATRIX**

On the pages that follow, you'll find two tools to support your efforts to identify current assets and areas for growth on your board.

- The Board Composition-Individual Reflection Worksheet is to be completed by each board member. (Please do not answer or guess on other members' behalf!)
- The Board Composition-Group Reflection Worksheet is designed to summarize individual reflections and guide board discussions about priorities and areas for growth.

### **Instructions**

- 1. Ask each board member to complete the Individual Reflection Worksheet.
- 2. Use the Group Reflection Worksheet to lead a discussion with the full board about their answers and agree on growth areas you want to focus on as you recruit new board members.



Part Two: Practice Equity Daily

Workbook





## Part Two: Practice Equity Daily > 3. Nurture a diverse, equity-minded board. BOARD COMPOSITION MATRIX—INDIVIDUAL REFLECTION WORKSHEET

### **Instructions**

- 1. In the first column, please check all that apply in each category, to the extent that you are willing to share. We'll keep this information on file and only share this data in the aggregate. Purposes for sharing this data include informing board discussions and complying with data requests from funding sources. Thank you for your willingness to participate.
- 2. In the second column, identify the elements that you think are important to have represented on our board using the following scale
- 5=Essential
- 3=Important
- 1=Nice to Have
- 3. In the third column, identify the elements that you see as areas for growth for your board, using the following scale
- 5=High priority
- 3=Medium priority
- 1=Low priority

	Self-Assessment	Importance to Board Composition Overall	Areas for Growth
Competencies: Willingness to act, inspire, and mobilize			
Strategic thinker			
Connects leaders to leaders			
Advocates for community			
Future focused			
Steward of brand and trust			
Champions equity and diversity and exemplifies lifelong learning			

**Comments: competencies** 



Part Two: Practice Equity Daily





# Part Two: Practice Equity Daily > 3. Nurture a diverse, equity-minded board. BOARD COMPOSITION MATRIX—INDIVIDUAL REFLECTION WORKSHEET, CONT.

	Self-Assessment	Importance to Board Composition Overall	Areas for Growth
Influence: Willingness to connect capital to the organization			
Access to resources and assets			
Access to legislators			
Access to community leaders			
Access to national influencers			
Access to content experts			
Access to diverse people and resources (e.g., experts, influencers, leaders)			
Other			

**Comments: competencies** 





Part Two: Practice Equity Daily





## Part Two: Practice Equity Daily > 3. Nurture a diverse, equity-minded board. BOARD COMPOSITION MATRIX—INDIVIDUAL REFLECTION WORKSHEET, CONT.

	Self-Assessment	Importance to Board Composition Overall	Areas for Growth
Skills and Experience: Willingness to contribute skills and know Experience	vledge		
Business operations (e.g., finance, HR, IT, legal)			
Marketing			
Fundraising			
Policy			
Community engagement/community organizer/labor			
Nonprofit/philanthropy			
Government			
Entrepreneurship			
Diversity and equity practices			





Part Two: Practice Equity Daily



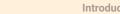




## Part Two: Practice Equity Daily > 3. Nurture a diverse, equity-minded board. BOARD COMPOSITION MATRIX—INDIVIDUAL REFLECTION WORKSHEET, CONT.

	Self-Assessment	Importance to Board Composition Overall	Areas for Growth
Skills and Experience: Willingness to contribute skills and know Sector	vledge		
Faith-based			
Community			
Government			
Political			
Corporate			
Nonprofit/philanthropy			
Education			
Income			
Health			





Part Two: Practice Equity Daily







# Part Two: Practice Equity Daily > 3. Nurture a diverse, equity-minded board. BOARD COMPOSITION MATRIX—INDIVIDUAL REFLECTION WORKSHEET, CONT.

	Self-Assessment	Importance to Board Composition Overall	Areas for Growth	
Skills and Experience: Willingness to contribute skills and knowledge  Board tenure				
Less than 1 year				
1−2 years				
3–5 years				
6 or more years				
Other Control of the				
LUW specific				
	•			
Geographic				
LUW specific				
Other (please describe)				

**Comments: skills and experience** 





Part Two: Practice Equity Daily





## Part Two: Practice Equity Daily > 3. Nurture a diverse, equity-minded board. BOARD COMPOSITION MATRIX—INDIVIDUAL REFLECTION WORKSHEET, CONT.

	Self-Assessment	Importance to Board Composition Overall	Areas for Growth					
Demographics (please check all that apply or write in how you identify) Race/ethnicity								
Asian American, Pacific Islander								
Black, African American								
Latinx, Hispanic								
Middle Eastern, North African, Arab								
Native American, American Indian, Alaskan Native								
White, European American								
Multiracial								
Other (please describe)								





Part Two: Practice Equity Daily







## Part Two: Practice Equity Daily > 3. Nurture a diverse, equity-minded board. BOARD COMPOSITION MATRIX—INDIVIDUAL REFLECTION WORKSHEET, CONT.

	Self-Assessment	Importance to Board Composition Overall	Areas for Growth
Demographics (please check all that apply or write in how you in Gender	dentify)		
Female			
Male			
Transgender			
Gender non-conforming, gender variant, gender queer			
Other			
Class/socioeconomic status			
Lower income			
Middle income			
Upper income			
Inherited wealth			





Part Two: Practice Equity Daily







## Part Two: Practice Equity Daily > 3. Nurture a diverse, equity-minded board. BOARD COMPOSITION MATRIX—INDIVIDUAL REFLECTION WORKSHEET, CONT.

	Self-Assessment	Importance to Board Composition Overall	Areas for Growth					
Demographics (please check all that apply or write in how you identify) Sexuality/sexual orientation								
esbian, gay, bisexual, queer								
eterosexual								
ther								
anguages spoken								
nglish								
panish								
hinese								
ther (please describe)								



Part Two: Practice Equity Daily





## Part Two: Practice Equity Daily > 3. Nurture a diverse, equity-minded board. BOARD COMPOSITION MATRIX—INDIVIDUAL REFLECTION WORKSHEET, CONT.

	Self-Assessment	Importance to Board Composition Overall	Areas for Growth					
Demographics (please check all that apply or write in how you identify) Ability/disability								
Hearing impairment								
_ow vision/blindness								
Mobility impairments								
Cognitive/intellectual impairments								
Other								
Age/generation								
8-34								
5-50								
1–65								
6+								

**Comments: demographics** 







## Part Two: Practice Equity Daily > 3. Nurture a diverse, equity-minded board. BOARD COMPOSITION MATRIX—GROUP DISCUSSION WORKSHEET, CONT.

#### Instructions

- 1. Use the first three columns to record aggregated data from the Individual Reflection Worksheets.
- 2. Share the aggregated data, ideally before a board discussion so members can reflect on it.
- 3. Design your board discussion(s) to
  - a. Explore the current composition and individual reflections about the importance of various elements and areas for growth.
  - b. Build agreement on elements of importance for your board composition and priorities for board recruitment.

	COMPILATION OF INDIVIDUAL WORKSHEETS			GROUP AGREEMENTS	
	Self-Assessment	Importance to Board Composition Overall <sup>48</sup>	Areas for Growth <sup>49</sup>	Importance to Board Composition	Areas for Growth
Competencies: Willingness to act, ins	pire, and mobilize				
Strategic thinker					
Connects leaders to leaders					
Advocates for community					
Future focused					
Steward of brand and trust					
Champions equity and diversity and exemplifies lifelong learning					
Comments: competencies					



#### Part Two: Practice Equity Daily





## Part Two: Practice Equity Daily > 3. Nurture a diverse, equity-minded board. BOARD COMPOSITION MATRIX—GROUP DISCUSSION WORKSHEET, CONT.

	COMPILATION OF INDIVIDUAL WORKSHEETS			GROUP AGREEMENTS	
	Self-Assessment	Importance to Board Composition Overall <sup>48</sup>	Areas for Growth <sup>49</sup>	Importance to Board Composition	Areas for Growth
Influence: Willingness to connect cap	ital to the organization				
Access to resources and assets					
Access to legislators					
Access to community leaders					
Access to national influencers					
Access to content experts					
Access to diverse people and resources (e.g., experts, influencers, leaders)					
Other					
Comments: influence					







## Part Two: Practice Equity Daily > 3. Nurture a diverse, equity-minded board. BOARD COMPOSITION MATRIX—GROUP DISCUSSION WORKSHEET, CONT.

	COMPILATION OF INDIVIDUAL WORKSHEETS			GROUP AGREEMENTS	
	Self-Assessment	Importance to Board Composition Overall <sup>48</sup>	Areas for Growth <sup>49</sup>	Importance to Board Composition	Areas for Growth
Skills and Experience: Willingness to	contribute skills and know	rledge			
Experience					
Business operations (e.g., finance, HR, IT, legal)					
Marketing					
Fundraising					
Policy					
Community engagement/ community organizer/labor					
Nonprofit/philanthropy					
Government					
Entrepreneurship					
Diversity and equity practices					



Part Two: Practice Equity Daily





## Part Two: Practice Equity Daily > 3. Nurture a diverse, equity-minded board. BOARD COMPOSITION MATRIX—GROUP DISCUSSION WORKSHEET, CONT.

	COMPILATION OF INDIVIDUAL WORKSHEETS			GROUP AGREEMENTS	
	Self-Assessment	Importance to Board Composition Overall <sup>48</sup>	Areas for Growth <sup>49</sup>	Importance to Board Composition	Areas for Growth
Skills and Experience: Willingness to	contribute skills and know	ledge			
Sector					
Faith-based					
Community					
Government					
Political					
Corporate					
Issue area					
Education					
Income					
Health					
Board tenure					
Less than 1 year					
1-2 years					
3-5 years					
6 or more years					
Board tenure					
LUW specific					







## Part Two: Practice Equity Daily > 3. Nurture a diverse, equity-minded board. BOARD COMPOSITION MATRIX—GROUP DISCUSSION WORKSHEET, CONT.

	COMPILATION OF INDIVIDUAL WORKSHEETS			GROUP AGREEMENTS	
	Self-Assessment	Importance to Board Composition Overall <sup>48</sup>	Areas for Growth <sup>49</sup>	Importance to Board Composition	Areas for Growth
Skills and Experience: Willingness to	contribute skills and know	ledge			
Geographic					
LUW specific					
Other (please describe)					

**Comments: skills and experience** 

Demographics	(please chec	k all that apply or wr	ite in how you identify)
--------------	--------------	------------------------	--------------------------

#### Pace/ethnicity

Race/ethnicity			
Asian American, Pacific Islander			
Black, African American			
Latinx, Hispanic			
Middle Eastern, North African, Arab			
Native American, American Indian, Alaskan Native			
White, European American			
Multiracial			
Other (please describe)			



Part Two: Practice Equity Daily





## Part Two: Practice Equity Daily > 3. Nurture a diverse, equity-minded board. BOARD COMPOSITION MATRIX—GROUP DISCUSSION WORKSHEET, CONT.

	COMPILATION OF INDIVIDUAL WORKSHEETS			GROUP AGREEMENTS	
	Self-Assessment	Importance to Board Composition Overall <sup>48</sup>	Areas for Growth <sup>49</sup>	Importance to Board Composition	Areas for Growth
Demographics (please check all that	apply or write in how you i	dentify)			
Gender	1				
Female					
Male					
Transgender					
Gender non-conforming, gender variant, gender queer					
Other					
Class/socioeconomic status					
Lower income					
Middle income					
Upper income					
Inherited wealth					
Sexuality/sexual orientation					
Lesbian, gay, bisexual, queer					
Heterosexual					
Other					



Part Two: Practice Equity Daily





## Part Two: Practice Equity Daily > 3. Nurture a diverse, equity-minded board. BOARD COMPOSITION MATRIX—GROUP DISCUSSION WORKSHEET, CONT.

	COMPILATION OF INDIVIDUAL WORKSHEETS			GROUP AGREEMENTS	
	Self-Assessment	Importance to Board Composition Overall <sup>48</sup>	Areas for Growth <sup>49</sup>	Importance to Board Composition	Areas for Growth
Demographics (please check all that apply or write in how you identify)					
Languages					
English					
Spanish					
Chinese					
Other (please describe)					
Ability/Disability					
Hearing impairment					
Low vision/blindness					
Mobility impairments					
Cognitive/intellectual impairments					
Other					
Age/generation					
18-34					
35-50					
51-65					
66+					

**Comments: demographics** 

Financial Priviledge





Part Two: Practice Equity Daily > 3. Nurture a diverse, equity-minded board.

### **IDENTIFY YOUR CURRENT SOCIOECONOMIC STATUS**







#### PERSONAL FINANCIAL EXPERIENCE

### Where you fall on the sliding scale

\*Basic needs include food, housing, and transportation. \*Expendable income might mean you are able to buy coffee or tea at a shop, go to the movies or a concert, buy new clothes, books, and similiar items each month, etc.









Part Two: Practice Equity Daily > 3. Nurture a diverse, equity-minded board.

### **TOOLS FOR A DEEPER DIVE**

#### **Challenging Assumptions and Practices in Board Diversity**

James Irvine Foundation

This article summarizes a conversation among grantee organizations about challenges and opportunities in building board diversity. It also contains a link to a two-hour video conversation on the topic.

#### **Engagement Governance for System-wide Decision Making**

Judy Freiwirth

This short article looks at how stakeholders beyond the board can share key governance functions like fiduciary responsibility, evaluation and, ultimately, positive community impact.

#### Taking Action on Board Diversity: Five Questions to Get You Started

**Board Source** 

This two-page primer focuses on improving and supporting boards. It starts with data that shows little improvement in board diversity since 1994, despite chief executives seeing it as important. It then offers five elemental questions for you to determine your needs and find the best candidates to meet them.

In addition to the tools in this toolkit, consult a variety of UWW resources for board development, which will be updated to reflect issues related to race, equity, and inclusion:

- · Board member onboarding
- Board member recruitment
- Board member job description
- **Board member engagement**
- **Board meeting management**
- Board meetings strategies for prioritizing time
- · Board engagement with the community
- Board governance roles
- **Board composition matrix**
- New Board member criteria
- · Board orientation meeting-basic board responsibilities



See also, tools for a Deeper Dive in the Organizational Culture and Workforce sections above.





Part Two: Practice Equity Daily > 4. Tell stories centered on people and systems.

### STORYTELLING FOR SOCIAL JUSTICE50

As a multicultural society, the United States is rich with stories from diverse groups that make up this country. As a deeply racialized society stained by structural racism, not all stories are equally acknowledged, affirmed, or valued, however. Many stories survive through tenacious resistance against a status quo that marginalizes-and often silences-their telling, thus diminishing their truths.

The Storytelling Project Curriculum asks students to consider what we lose when stories of and by diverse groups are concealed or lost, and what we gain as a society when we listen to and learn from them. The curriculum also invites students to tell their own stories and, in doing so, identify the challenges they face in a racialized society and articulate their visions for a future that offers inclusion, equity, and justice to all diverse people.

Below, we examine four story types about race and racism in the United States: stock stories, concealed stories, resistance stories, and counter stories. Consult the curriculum for a full range of activities. Consider building exercises for your staff to explore the different kinds of stories as they relate to your organization, your community, and society at large. Consider how you can use them to analyze the stories you tell in your fundraising, program descriptions, and other public communications. The materials that follow are an excerpt from the curriculum.



We begin with stock stories. They're the most public and ubiquitous in dominant, mainstream institutions such as schools, government, workplaces, and the media. The other story types critique and challenge their presumption of universality, so they provide the ground from which we build our analysis. Stock stories are told by the dominant group, passed on through historical and literary documents, and celebrated through public rituals, monuments, and media representations. Because they tell us a lot about what a society considers important and meaningful, stock stories about race and racism provide a useful point of analysis to understand how racism operates.

Concealed stories coexist alongside stock stories but most often remain hidden from public view. Though invisible to those in dominant society, concealed stories are often circulated, told and retold by people in the margins to honor and express their experiences and aspirations, and provide a perspective that's often very different from the mainstream. These stories recount experiences, critique or "talk back" to mainstream narratives, and share the struggles, self-affirmation, and survival of often stigmatized people in the face of oppressive circumstances. Aurora Levins Morales writes, "We must struggle to re- create the shattered knowledge of our humanity. It is in retelling of stories of victimization, recasting our roles from subhuman scapegoats to beings full of dignity and courage, that this becomes possible."

Though concealed stories are often eclipsed by stock stories, they challenge the stock stories and offer a perspective that can expose and challenge their self-interested nature and purported universality. We can deconstruct stock stories by comparing them to concealed stories, identifying different perspectives and knowledge, and developing a fuller picture of our society and its institutions. These comparisons can also help us understand how stock stories maintain the institutional and social status quo in a racial system that harms everyone by preventing the full realization of our ideals as a democracy committed to equality.

Resistance stories are a third type of story we examine in this curriculum. These are historical and contemporary stories that tell how people have resisted racism, challenged the stock stories that support it, and fought for more equal and inclusive social arrangements. Resistance stories are the reserve of built-up stories about challenges to an unjust status quo. They include "sheroes" and "heroes" who have been excluded from history books (or included and vilified) but nevertheless struggled against racism. These









### 

stories can teach us about anti-racist perspectives and practices that have existed through history to the present, expanding our vision of what's possible in our anti-racism work.

Finally, we explore what we call **counter stories**, which are new stories deliberately constructed to challenge the stock stories, build on and amplify resistance stories, and offer ways to interrupt the status quo to work for change. These stories are a continual critique and opposition to stock stories and enable new possibilities for inclusive human community.

These four story types are intricately connected. Stock and concealed stories are essentially two sides of the same coin, reflecting on the same realities of social life from different perspectives. Resistance and counter stories are also linked through their capacity to challenge stock stories. Resistance stories are a base for the imagining of counter stories and serve to energize their creation. Counter stories then build anew in each generation as they culminate the struggles before them and learn from and build on resistance stories that preceded them.

#### HOW ABOUT EXPLORING THE STORY TYPES

#### Stock stories

Students explore the societal genealogy of racism, the conditions that generated it, and the ways it has been transmitted to the present through the stock stories that keep it in place.

#### Guiding questions

- · What are the stock stories about race and racism in U.S. society that justify and perpetuate an unequal status quo?
- · How do we learn these stories?
- · Who benefits from stock stories and who pays?
- How are costs and benefits obscured through stock stories?

#### **Concealed stories**

Students develop analytical tools for research and examine concealed stories that reveal the underside of racism. They also analyze concealed stories to understand how racism looks from the perspective of communities of color and identify the hidden advantages for Whites and explore the negative consequences of inequities for all people in our society.

Following the lead of critical race theory, we begin with activities that tell the social and experiential context of racial oppression through the experiences of people of color (Taylor, 1998). These stories tend to narrate the past and ongoing realities of racism that are either invisible or only glimpsed in the stock stories. Such stories lead the search for concealed structures of racial inequality and the hidden stories of white advantage.

#### Guiding questions

- · What are the stories about race and racism that we don't hear?
- · Why don't we hear them?
- · How are these stories lost/left out?
- · How do we recover these stories?
- What do these stories teach us about racism that the stock stories do not?

#### Resistance stories

Students research to find and explore resistance stories told by individuals and groups who have opposed racism throughout history and into the present. These stories serve as guides that can help students learn about ways to resist and work against racism as they begin to imagine more just alternatives to guide their own efforts.

#### Guiding questions

- What stories exist (historical or contemporary) that serve as examples of resistance?
- · What role does resistance play in challenging the stock stories about racism?
- · What can we learn about anti-racist action by looking at these stories?





Part Two: Practice Equity Daily







### Part Two: Practice Equity Daily > 4. Tell stories centered on people and systems. $\textbf{STORYTELLING FOR SOCIAL JUSTICE, CONT.}^{50}$

#### **Counter storytelling**

Building on existing resistance stories, students generate new stories about their vision for a more just future and develop strategies to enact anti-racist action for more inclusive schools and communities.

#### **Guiding questions**

- · What can we draw from resistance stories to create new stories about a human community where differences are valued?
- What kinds of justice-based communities can we imagine and work to embody?
- What kinds of stories can raise our consciousness and support our ability to speak and act against instances of racism?

We believe the Storytelling Project Model and the story types we identify offer a powerful framework to understand race and racism. The curriculum based on this model offers one way to address concerns about racism and race relations in this country felt by students from all racial/ethnic groups. Teachers interested in supporting students in developing anti-racist understanding and strategies have a critical role to play. We encourage them to try out this curriculum in their classrooms.

We also encourage teachers to find a community of support among colleagues in their schools and communities as they work with students on these issues. The process of learning about racism and ways to dismantle it will at times be painful and difficult, often joyful and empowering, and ultimately energizing and mobilizing. It's important for teachers and students to know that they are part of a much larger struggle and broader group of people who share in this collective effort.







### Part Two: Practice Equity Daily > 4. Tell stories centered on people and systems. A STYLE GUIDE—HARNESSING LANGUAGE IN SUPPORT OF INTERSECTIONALITY AND CROSS-SECTOR POWER BUILDING<sup>51</sup>

#### INTRODUCTION

Language is a key ingredient in a winning theory of change. It can build bridges and change minds. By acknowledging its ability to shape and reflect reality, progressive campaigns can become more powerful vehicles for social change, inclusion, and justice. In fact, understanding and applying the authentic language of the individuals and communities we work with can be a revolutionary act in itself.

Historically, issue-based language guidelines have remained siloed or proprietary. Some information has trickled up (with some questionable success) to be centralized in grammar and usage style guides (e.g., APA, AP, CMS) but this information is far from comprehensive and lacks the voice of the groups being discussed. At the same time, transparent conversations about the power of word choice and phrasing have remained disconnected and difficult to access.

In 2015, Hanna Thomas led SumOfUs staff in the compilation of a new kind of guide that sparks a conversation about language among progressives. With the help of Anna Hirsch, an independent editor, "A Progressive's Style Guide" was born. We invite drivers of progressive change-community members, grassroots leaders, activists, and progressive funders-to study the vital movement frameworks, decolonizing usage, and up-todate word choice and phrasing for current theory of change directions and momentum across groups and issue areas.

"A Progressive's Style Guide" is explicitly multi-voiced, created with the following commitments: 1) we combat discriminatory language, 2) we seek advice or more information when we're unsure, 3) when writing, speaking, or using images, we look for examples that reflect a broad range of identities and perspectives.

We understand that there may be negative blowback to this work and that we won't be the first to experience it. We affirm that we are aligned with free speech and, at the same time, are promoting thoughtfulness and openness about how language is and isn't used, has been used, and could be used for people collectively. Because language is dynamic, changes with our struggles, and is shaped by criticism and the collective construction of social justice, we're compelled to keep building a collective language that liberates us all.

As we continue to think about ways to organize this information that are accessible, user-friendly, clear, and aligned with progressives' beliefs and strategies, we know that in some instances, we still fall short—so we also invite feedback. We're committed to this work and to remaining in dialogue. Many thanks for your help and solidarity!

#### **CENTRAL PRINCIPLES**

#### **People-first language**

People-first language aims to make personhood the essential characteristic of every person. It views other descriptive social identities that people may hold as secondary and non-essential. Strict adherence to people-first language can lead to awkward sentence construction and may not align with reclamations of social identities, but we maintain that attuning to our shared humanity by telling stories that center people first, rather than exploiting identities, should be an aim of progressive writing.

#### Self-identification

Wherever categorization and labels are used to oppress groups of people, self-identification becomes an act of resistance. At the same time, people who are robbed of opportunities to self-identify lose not just words that carry political power, but aspects of their culture, agency, and spirit. Progressive writing, as much as possible, should strive to include language that reflects peoples' choice and style in how they talk about themselves. If you aren't sure, ask.

#### **Active voice**

A grammatical voice in many languages, active voice puts the "actor" of the sentence in the role of performing the action. Often lauded for contributing to more dynamic writing, active voice may also be key to naming perpetrators of violence and harm directly. Writers should use the opportunity to scan for active voice to root out implicit bias toward status quo systems of power by naming the actors of oppression, whether human, institutional, or cultural.

#### **Proper nouns**

Names used for and by individual places, persons, and organizations convey respect, understanding, acceptance, and clarity. At the same time, common nouns and pronouns can dilute an issue or simply create confusion. While conversational tone is often used in campaign writing, great care should be taken to avoid misleading readers. For example, overuse of words such as "it," "that," and "this" may leave the reader wondering who the writer is talking about at a critical point in the story.







## Part Two: Practice Equity Daily > 4. Tell stories centered on people and systems. A STYLE GUIDE—HARNESSING LANGUAGE IN SUPPORT OF INTERSECTIONALITY AND CROSS-SECTOR POWER BUILDING, CONT.<sup>51</sup>

#### **RACE/ETHNICITY**

#### **Writing guidelines**

Racism, in order to be dismantled, must be uprooted at every level, from the foundations of institutions that dictate the practices and policies enacted by personnel to the attitudes and beliefs that we reinforce through repeated social interactions and deeply internalized messages. Reclaiming power from racist systems takes a willingness to come to the conversation with curiosity, openness, and a willingness to get it wrong without letting that stop us from continuing to try to understand and do better.

Language that suggests a capacity to step outside default roles to hear and support folks who have been hurt and limited by racism is necessary. Stories and terms that are meaningful to folks in developing their identities and building power will change what's possible in fights to end racism, and will help win.

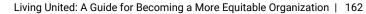
#### **Specific recommendations**

- Tell stories from the perspective of the community being represented rather than through the lens of the dominant power brokers. Centering the perspective of marginalized groups will often require an education in common underlying assumptions. Actively seek out this information.
- · Understand what race, racism, racial identity, ethnicity, ethnic oppression, and ethnic identity are.
- · Avoid references that draw undue attention to ethnic backgrounds or racial identities. When references are valid, learn the most appropriate specific terminology or use the term preferred by the person or group concerned. Also, remember to mention the race or color of white people as well.
- · Capitalize the proper names of ancestral, national, place, and religious identities—for example, Indigenous Peoples, Arab, FrenchCanadian, Inuit, Jew, Latin, Asian, Cree.
- Combining names of continents is a common way of identifying someone's ancestry (e.g., African American, AfroCuban, Eurasian.) These should be capitalized. These are also sometimes used to indicate race; however, there are problems with using these descriptors as analogues for racial identities. Describing a person who is Black and lives in Canada as African American may create inaccuracies if they don't self-identify culturally as African, if they do self-identify as Canadian, or if they're white, born in Africa, and recently moved to Canada.
- Try saying "a Black person" or "a person of color" instead of "an African American" or "a Black." At the same time, some groups will prefer the former terminology, and it will still be important to use language used by the people being represented.
- · Note: "person of color" and "Black" are not synonymous, however. Also, "person of color" and "immigrant" are not synonymous.

- · Consider your audience when deciding to capitalize Black/White. Sometimes they are lowercased. Follow the lead of your constituencies, set a consistent house style, and follow it.
- Avoid vocabulary that extends negative racial, ethnic, or cultural connotations and avoid usage that carries hierarchical valuation or portrays groups of people as inferior, bad, criminal, or less valued than others. At times, such language may be difficult to perceive from the point of view of an oppressor group. Don't assume you know all the ways that a phrasing may land. Take the time to check it out with others.
- Using "minority" may imply inferior social position and is often relative to geographic location. When needed, the use of "minority ethnic group" may be preferred over "minority group." "Minorities" are actually 85% of the world population and make up the global majority.
- Note that "racial minority" or "visible minority" typically describe people who are not white; "ethnic minority" refers to people whose ancestry is not English or Anglo-Saxon and "linguistic minority" refers to people whose first language is not English (or not French in Quebec).
- Avoid generalizations based on race or ethnicity, including common expressions with a history rooted in oppression.
- · Don't define a person's appearance based primarily on their nationality or cultural background.

#### Resources

- America Healing, Racial Equity Resource Guide: Glossary
- · Global Sociology, Glossary
- Four Lessons from the Media's Conflicted Coverage of Race
- Racial Equity Tools Glossary
- Cultural Appropriation







Part Two: Practice Equity Daily







# Part Two: Practice Equity Daily > 4. Tell stories centered on people and systems. A STYLE GUIDE—HARNESSING LANGUAGE IN SUPPORT OF INTERSECTIONALITY AND CROSS-SECTOR POWER BUILDING, CONT.<sup>51</sup>

#### TERMS USED BY RACIAL JUSTICE ACTIVISTS

Bias

bigotry

Black

Black cultural appropriation

culture

ethnic minority

linguistic minority

microaggression

oppression, internalized oppression

person, people of color (with consideration)

polite white supremacy

prejudice, discrimination

racial minority

racism

visible minority

white supremacy (white privilege is still used)

#### TERMS AVOIDED AND QUESTIONED BY RACIAL JUSTICE ACTIVISTS

Caucasian

colorblind

diverse

ghetto (especially as an adv. or adj.)

grandfathered in

gyp, gypped

minority

multicultural

Oriental

post-racial

races, subspecies

radicalized

thug

you people, those people



Part Two: Practice Equity Daily





### Part Two: Practice Equity Daily > 4. Tell stories centered on people and systems. TOOLS FOR A DEEPER DIVE

#### **American Opportunity: A Communications Toolkit**

Opportunity Agenda and the SPIN Project

Part One features the results of messaging research and offers practical guidance for the concepts and language to create an "opportunity society" for everyone. Part Two contains templates for a variety of messaging tools, including op-ed pieces, press releases and talking points for different constituencies using an opportunity frame as well as guidance for choosing spokespeople. Part Three shares promising practices and case stories.

#### **Communications Toolkit**

RacialEquityTools.org

This repository features a number of articles, toolkits and other resources.

#### Do's and Don'ts of Reporting New Through a Racial Justice Lens

Annie E. Casey Foundation

This short article offers reporting tips and refers to a longer report by the Aspen Institute and the Annie E. Casey Foundation entitled "Reporting on Race in the 21st Century."

#### **Equity in Fundraising Programs: What's Our Nonprofit Doing About It?**

The Storytelling Nonprofit

This brief article focuses mostly on women and fundraising, but the insights are highly transferrable to address inequities driven by racism.

#### **Navigating Race and Class Dynamics in Fundraising**

**Grassroots Institute for Fundraising Training** 

This is a story of how a grassroots organization in Los Angeles dedicated itself to talking explicitly about race and racism and made a decision to shift to a membership organization as a central fundraising strategy that best fit its values and mission. Resource Generation publications. "Resource Generation organizes young people with wealth and class privilege in the U.S. to become transformative leaders working towards the equitable distribution of wealth, land and power."

#### A Social Justice Communication Toolkit: Vision, Values, and Voice

The Opportunity Agenda

This toolkit provides a step-by-step process for preparing your messages and working with media to support your efforts to expand opportunity for all.

#### **Telling Our Own Stories: Role of Narrative in Racial Healing**

W.K. Kellogg Foundation

This report "is an important resource for leaders and practitioners working to overcome our nation's legacy of racism. The authors present the emerging science of the power of narrative and do so within the context of efforts by diverse communities to find effective ways of communicating and creating new, authentic stories that honor the complexity of the past while forging a more equitable future."



See also Communications Tools in Tools for a Deeper Dive in the Making the Case for Change section.





Part Two: Practice Equity Daily







### Part Two: Practice Equity Daily > 5. Design programs & policies that are targeted & universal. INTRODUCTORY QUESTIONS FOR PROGRAM DESIGN AND EVALUATION

This toolkit focuses on internal organizational issues. Still, we want to highlight some of the questions you should raise when you begin to focus on your community impact work.

#### PROGRAM AND POLICY DESIGN

- How do (or can) we engage our constituents/participants in understanding the challenges and designing and implementing our programs, policy advocacy and other activities?
- What are our goals? How do they reflect shared values and aspirations of our community?
- What do the data tell us about which groups in our community are carrying the burden of negative outcomes, or are furthest from those goals?
- What system dynamics (causes or drivers of outcomes, flows of information and resources, uses of power) are producing or reinforcing the circumstances that we want to address through programming, policy advocacy, or other efforts?
- What are effective ways to engage with those systems dynamics? Where are the leverage points for change for different groups in your community?
- How can we translate our understanding of the systems dynamics and leverage points for change into programming or policy that is differentiated and targeted to specific groups based on the data?
- How does (or can) our programming and policy work explicitly interrupt racism, produce more equitable outcomes and foster deeper inclusion?
- · How do (or can) we build on community strengths and assets in and through our programming and policy advocacy?

#### **PROGRAM EVALUATION**

- How are we engaging our constituents/participants in defining success? In assessing the impact of our work?
- Do our goals include equitable results, equitable processes and improved relationships across different groups within our community?
- · How do we assess the impact of our work?
- · How do we ensure that we are addressing inequities as we explore overall program outcomes?
- How are we using evaluation results to learn and inform future plans and actions?





Introduction

Part One: Get Ready

Part Two: Practice Equity Daily



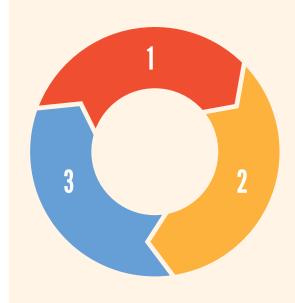




Part Two: Practice Equity Daily > 5. Design programs & policies that are targeted & universal.

### SYSTEMS ANALYSIS GUIDE<sup>52</sup>

#### A systems analysis of inequities is designed to:



- 1. Identify root causes and contributing factors
- 2. Surface possible strategies and solutions for addressing the problems
- 3. Help discern among the options generated which strategies and solutions can leverage desired changes and make transformative systematic impacts

You can use the questions below to guide you through a basic systems analysis. They address key elements of systemic racialization, including history, culture, interconnected institutions and policies and racial ideologies. Examining how racism interacts with other systems of privilege, oppression and power — such as gender and economic inequality — is another important facet of conducting a systems analysis.

- 1. What are the racial inequities, barriers or negative outcomes involved in the problem being examined? Who is burdened most and who benefits most?
- 2. What institutions are involved? What unfair policies and/or practices are involved?
- 3. What social conditions or determinants contribute to the problem (such as poverty, housing segregation, education)?
- 4. What other compounding dynamics are involved (such as income or gender inequities)?
- 5. What cultural norms, myths or popular ideas justify or maintain the problem?
- 6. How did things get this way and what are some of the cumulative impacts?
- 7. What are the key causes or contributing factors?
- 8. What solutions or interventions could eliminate the inequities?
- 9. What can be learned from prior efforts to solve the problem or change the system?
- 10. What strategies could result in systemic change and advance equitable solutions?





Part Two: Practice Equity Daily





### Part Two: Practice Equity Daily > 5. Design programs & policies that are targeted & universal. A GUIDE TO DEVELOPING RACIALLY EQUITABLE SOLUTIONS $^{53}$

The following questions can help ensure that targeted strategies and investments yield the greatest impact for children, families and communities of color.

- 1. What racial disparities do you want to eliminate, reduce or prevent?
- 2. What groups most adversely affected by the current problem do you want to benefit?
- 3. How can those most adversely affected by the issue be actively involved in solving it?
- 4. What is a specific change in policy that could help produce more equitable outcomes?
- 5. How will your proposed solution address root causes and advance systemic change?
- 6. What change do you ideally want (not just what you would settle for)?
- 7. What positive principles or shared values are reflected in this proposed reform?
- 8. Does the proposal have clear goals, plans and timetables for implementation, with sufficient funding, staffing, public reporting, accountability and evaluation?
- 9. Who can be allies and supporters and how can they be engaged?



Introduction





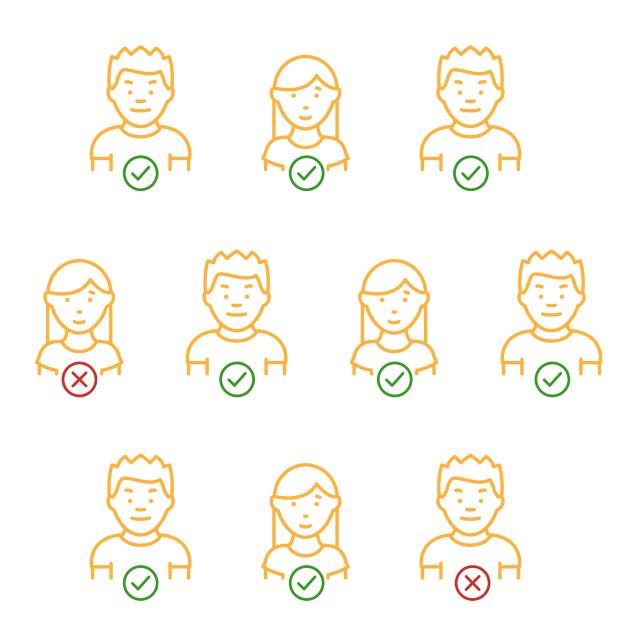


Part Two: Practice Equity Daily > 5. Design programs & policies that are targeted & universal.

### APPLYING TARGETED UNIVERSALISM54

Consider this example as a process for targeted universalism. First, set a universal goal-for example 100 percent proficiency in eighth grade math. Second, measure how the overall population fares relative to the universal goal. In this example we might discover that only 80 percent of eighth graders are proficient in eighth grade math. Third, measure the performance of population segments relative to the universal goal. So although 80 percent of all eighth graders are proficient, we might find that only 70 percent of Latinos are proficient. Fourth, understand how structures and other factors support or impede group progress toward the universal goal. For our Latino students, classroom instruction materials and lessons designed for English speakers may impede learning including math proficiency. Finally, implement targeted strategies so that each group can achieve the universal goal based upon their needs and circumstances. This may take the form of ESL-specific math tutoring for our Latino students while another group may require a completely different strategy to achieve the same universal goal. Targeted universalism rejects a blanket universal, which may be indifferent to the reality that different groups are situated differently relative to the institution and resources.

For a detailed guidance on how to apply targeted universalism to policy and programming, see <u>"Targeted Universalism:</u> Policy & Practice", john a. powell, Stephen Menendian, Wendy Ake, Haas Institute for a Fair and Inclusive Society at UC Berkeley.









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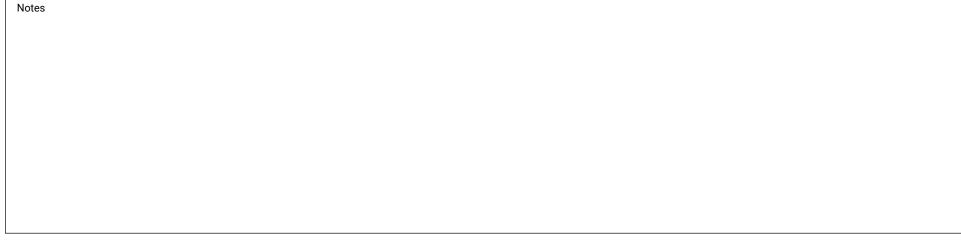
A racial equity impact assessment is a systematic examination of how a proposed action or decision will likely affect different racial and ethnic groups. It is a useful tool for assessing the actual or anticipated effect of proposed policies, institutional practices, programs, plans and budgetary decisions. The racial equity impact assessment can be a vital tool to reduce, eliminate and prevent racial discrimination and inequities and prevent institutional racism.

Racial equity impact assessments are best conducted during the decision-making process, prior to enacting new proposals. They can be used to inform decisions in a way very similar to environmental impact statements, fiscal impact reports and workplace risk assessments.<sup>56</sup>

These questions can help you begin your race equity impact assessment.

- 1. Are all racial and ethnic groups that are affected by the policy, practice or decision at the table?
- 2. How will the proposed policy, practice or decision affect each group?
- 3. How will the proposed policy, practice or decision be perceived by each group?
- 4. Does the policy, practice or decision worsen or ignore existing disparities?
- 5. Based on the above responses, what revisions are needed in the policy, practice or decision under discussion?

Note: While these questions are framed for consideration before implementing a program or policy, they can also be useful as part of an ongoing evaluation and assessment process, to identify and correct for racialized impacts that were unanticipated.



55This is an excerpt from "Race Equity and Inclusion Action Guide: Embracing Equity-Seven Steps to Advance and Embed Race Equity and Inclusion Within Your Organization," Annie E. Casey Foundation

56See "Racial Equity Impact Assessment Tool," Race Forward





Part Two: Practice Equity Daily







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TOOLS FOR A DEEPER DIVE

While this toolkit is focused mainly on developing your organizational capacities, we offer these tools to support your initial thinking about equity in program and policy design and evaluation.

#### **EOUITY AND INEOUITIES IN OUR COMMUNITIES**

#### All-In Cities: Building and Equitable Economy From the Ground Up

All-in Cities is a group that is trying to shift the narrative on racial inequality and believes that the success of our cities "depends on the ability of people of color to be the leaders, innovators, workers, entrepreneurs and creative problem solvers who can produce widespread prosperity for generations." This framing paper for the All-In Cities initiative, released at the 2015 Equity Summit in Los Angeles, shares cross-cutting practices and an eight-point policy framework to build equitable, thriving cities by centering equity and inclusion in growth strategies.

#### **All-In Cities Toolkit**

#### PolicyLink

Explore this site to learn about "strategies and policy tools to advance racial inclusion and equitable growth. Each tool contains information on what the policy is, key considerations, who can implement it and examples of where it is working." Policy areas include: good jobs, economic security, homegrown talent, healthy neighborhoods, housing/anti-displacement, and democracy and justice.

#### 100 Million and Counting: A Portrait of Economic Insecurity in America

#### PolicyLink

This report defines economic insecurity, which affects some 106 million people in the U.S. It highlights the drivers of economic insecurity and closes with strategies for increasing wages, expanding financial security and increasing access to opportunity.

#### **National Equity Atlas**

#### PolicyLink

This is a comprehensive data resource to track, measure and make the case for inclusive growth. You can explore the site to get data for the US and for specific cities on diversity, growth, racial economic gaps, workforce preparedness and other equity indicators.

#### **ENGAGING AND INVOLVING COMMUNITY MEMBERS**

**Community Engagement Guide for Sustainable Communities** 

PolicyLink

#### Community and Stakeholder Engagement Done Right

Center for Public Policy Priorities and United We Dream

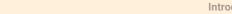
#### **Community Engagement Toolkit**

Leading Inside Out, Collective Impact Forum, Aspen Institute This toolkit includes a set of worksheets to help you plan your engagement and involvement strategy and activities.

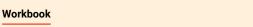
#### **Community Engagement Matters Now (More than Ever)**

Stanford Social Innovation





Part Two: Practice Equity Daily





### Part Two: Practice Equity Daily > 5. Design programs & policies that are targeted & universal. TOOLS FOR A DEEPER DIVE, CONT.

#### COLLECTING AND USING DATA

- The Annie E. Casey Foundation has hosted several webinars focused on using data to understand inequities and their causes: "By the Numbers," Part 1 and Part 2; "Using Data for Root Causes Analysis."
- <u>Using Data</u>, RacialEquityTools.org data toolkit

#### SELECTED PROGRAM AND POLICY AREAS

- Race for Results: Building a Path to Opportunity for All Children, Annie E. Casey Foundation
  - "In this KIDS COUNT policy report, the Foundation explores the intersection of kids, race and opportunity. The report features the new Race for Results Index, which compares how children are progressing on key milestones across racial and ethnic groups at the national and state levels. The index is based on 12 indicators that measure a child's success in each stage of life, from birth to adulthood. The indicators were chosen based on the goal that all children should grow up in economically successful families, live in supportive communities and meet developmental, health and educational milestones."
- Evidence-Based Practices
  - The Annie E. Casey Foundation has developed and compiled a series of reports and webinars that offer evidence-based practices in the areas of education, workforce development, child welfare and more. Examples include: Considering Culture: Building the Best Evidence-Based Practices for Children of Color and Jobs Program Takes Young Adults from Systems to Careers.
- Increasing breakfast participation to improve student outcomes This is an example of targeted universalism in practice.
- Umbrellas Don't Make it Rain: Why Studying and Working Hard Isn't Enough for Black Americans Insight Center for Community Economic Development
- This report debunks the myth that education and hard work will lead to economic success for Black Americans, illuminating structural barriers to economic success and describing policies that would remove these barriers.
- The Asset Value of Whiteness: Understanding the Racial Wealth Gap (or overview here) Demos and the Institute on Assets and Social Policy, Brandeis University "The Racial Wealth AuditTM is a new framework that evaluates the impact of public policy on the wealth gap between white households and households of color. The audit helps us to understand how far policies that equalize outcomes in areas such as housing, education and labor markets could go toward reducing the gap."

#### **EVALUATION AND CONTINUOUS LEARNING**

The Evaluation section of the website RacialEquityTools.org includes many useful resources, including this set of seven steps and questions: Guiding Questions: Doing Your Evaluation

Tools for Thought: Using Racial Equity Impact Analysis for Effective Policymaking

Anne E. Casey Foundation

"This case study takes a look at assessment tools that measure the impact of proposed legislation on populations of color. The assessment tools have been effective in shaping policy in Seattle and Minneapolis. Tools for Thought is the third installment in the Race for Results case study series. The series is designed to give leaders and advocates the tools to start meaningful conversations around race in their communities and implement data-informed and evidence-based policies that help to eliminate the inequities in opportunity for children of color."







Part Two: Practice Equity Daily > 5. Design programs & policies that are targeted & universal.

### **ACKNOWLEDGEMENTS**

The production and refinement of Living United: A Guide to Becoming a More Equitable Organization was an enormous undertaking. The United Way Worldwide Diversity, Equity & Inclusion team relied on the knowledge, perspective and leadership of the following organizations and individuals.

We are deeply grateful to the following Interaction Institute for Social Change staff for their partnership, insight and expertise without which this work would not have been possible.

Cynthia Silva Parker, Senior Associate Miriam Messinger, Director of Practice Glenn Johnson, Affiliate Trainer/Coach/Project Manager

We also relied on the expertise and insight of United Way network leaders to build and strengthen this toolkit. Thank you to the many equity champions who contributed to this resource.

United Way Worldwide is grateful to the Annie E. Casey Foundation for their investment, support and encouragement in advancing racial equity in the United Way network.

Thanks also to the following institutions, organizations and individuals who have allowed us to reprint their materials in this toolkit:

- Equity in the Center and ProInspire
- Hannah Thomas, SumOfUs.org and Anna Hirsch, ActivistEditor.com.
- Interaction Institute for Social Change
- OD Network
- · Race Forward
- Race Matters Institute/Just Partners
- Rosemarie Roberts and Lee Anne Bell, Barnard College
- · Social Transformation Project
- · Up Your Service

To learn about operationalizing equity within your United Way, please reach out to United Way Worldwide staff:

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