

LEADING BY EXAMPLE

East Bay Community Foundation



Coalition of
Community
Foundations
for Youth



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Introduction

Leading By Example (LBE) was designed to create an internal change process in four community foundations to increase their capacity to model equity, diversity and inclusive practices in their organizational structures and day-to-day operations. The initiative was launched in January 2002. The Charles Stewart Mott Foundation provided generous financial support for this initiative, and the Coalition of Community Foundations for Youth coordinated the effort with technical assistance from California Tomorrow, an Oakland-based nonprofit organization working to help build a strong, fair, multicultural society. The East Bay Community Foundation (EBCF) was one of the four participating foundations. This is EBCF's "first person" assessment of experiences, accomplishments, challenges and learnings at the end of 20 months of involvement in this initiative.

Setting the Stage

EBCF is attempting to address not simply "diversity" but equity and inclusion in the context of the significant social baggage we all carry around these issues. EBCF is already quite diverse, having nine persons of color among the 22 board members, and nine persons of color in a staff of 20. Obviously, if our sole concern was racial balance, our job would be close to done.

Clearly, we believe that our challenge is bigger and more important: we want to speak to what type of community we are helping to build and sustain. Our ability to "lead by example" hinges on taking the time to define, understand and connect this work to all aspects of our day-to-day operations. This work requires careful – but not timid – leadership, thoughtful strategies, specific tactics and the ability to distinguish among the three. By entering into this process we are exercising leadership and making our commitment public. We are raising expectations among our trustees, staff and in the community we serve.

At the outset we decided to work through our board and staff committee structures. This was a strategic decision that supported the goal of embedding the values of equity and inclusion in the way work is done at EBCF. It also means that it will take time for the questions we have posed to work their way through the committee structure, become embedded in the Foundation and have the desired

impact. This is a process of inquiry and action that will, by its very nature and by the unresolved history of this country on issues of race, gender, sexual orientation and ethnicity, make everyone defensive and uncomfortable at some point. Managing this discomfort is both a personal and an organizational issue. If we let this discomfort drive us toward neat packages and controlled responses, our effort will yield little. Consequently, we have invested a substantial amount of time in working on both the organizational and personal levels.

Trustees and staff have worked to increase their understanding of the issues that frame equity and inclusion as they present themselves currently, to set goals, commit resources, make hard decisions, live with some discomfort and measure progress. We also must prepare to pass the baton to those who follow us, as it would be arrogant to believe that all relevant decisions and necessary progress around equity and inclusion can be accomplished in the near future.

EBCF as an institution, in our community and in the field of philanthropy, has a lot at stake. Demographics will continue to change and many of the current practices and structures will not serve us well. Identifying, creating, and sustaining the necessary changes to achieve inclusion and equity is our task and it will be our task for the foreseeable future.

1. Our Plan of Work

Four major activities were initiated in designing our *Leading By Example* Work Plan. They are:

1. To look internally and engage the entire staff and trustees before we began to look externally.
2. To align our LBE efforts with our strategic planning process as a way of beginning to embed equity and inclusion principles in our work.
3. To have the core team of trustees and staff commit themselves to personal journeys on these issues and to invite the rest of the organization to engage in personal journeys.
4. To take the long view on results, understanding that we would be attempting to put something in place now, knowing that the real results would not be seen for perhaps a decade.

We began by convening a team consisting of eleven trustees and staff to serve as the core group to guide these efforts.

2. How Will We Define Success?

Defining a vision took precedence over defining success. We began by saying that we wanted to create a structure that allowed all voices in our community to be heard in the way we do our work. We also wanted to gather internal organizational data and external community data that would allow us to measure our efforts and results. We developed a two-part questionnaire to guide our inquiry:

- What don't we know that would help us better reflect and serve our community?
- How will we come to know it?

The subset of these questions is:

- Who or what voice is not in the room?
- What is the perspective on which a particular decision is based and how might it differ from those we are attempting to serve with the decision?
- What are the high stakes issues to which we need to be committed for using this questioning process?

We saw our efforts as a capacity-building opportunity that would help us address and reflect the dramatic demographic changes in our region. From the beginning, we outlined issues and internal processes we wanted to examine, including taking every opportunity to:

- Ensure that staff reflects the communities we serve, both by our recruiting and hiring decisions, and by providing opportunities for current staff to deepen their understanding and skill in working with our diverse communities.
- Examine our internal work practices in a way that allows our own diversity, both at a staff and trustee level, to transform the way we work.
- Make sure that the way we do business, e.g., the selections of vendors, service providers, and consultants, is mindful of opportunities to form linkages with communities often left out or relegated to fringe aspects of the commercial process.
- Review the process for recruiting trustees, using their skill sets and valuing their different perspectives and life experiences.
- Make our facilities available to all our constituencies and stakeholders.
- Identify and address the institutional racism that significant parts of our community face, and to look for opportunities to surface and lessen the impact of this legacy.

3. What Are Our Organizational Strengths and Weaknesses?

- Our grant making process is inclusive, with 92% of our grants serving communities of color.
- Our management team is not as racially diverse as it might be, although it includes broad dimensions of East Bay's diversity.
- We collect and use race, gender and economic data for the programs we fund, but currently do not track or aggregate that information as it is not entered into our database.
- We found that we were considered by our colleagues in the field to have taken proactive stances on issues of equity, inclusion and diversity, and the percentage of trustees that are people of color is larger than the average community foundation.
- We found that staff had a mixed opinion as to whether or not we needed to be more diverse and reflect a greater degree of diversity on the trustee and staff level.
- We immediately found from staff that, although this effort really focuses on racial diversity, issues of sexual orientation, class and economic status were also of concern to them.
- We have not effectively tapped into the philanthropic practices of many communities of color and they are not as aware of EBCF and our services as we would like.

4. What Is Our Involvement in LBE?

All our efforts to date have been internally focused. As a result, we have been successful in engaging the majority of our trustees and staff. This includes staff who work on Foundation initiatives and are not physically located in the Foundation building. We have used the following strategies to engage our colleagues:

- All of our communications around LBE have been sent to both staff and trustees.
- Staff and trustees have been invited to engage in a personal journey on the issues of diversity, equity and inclusion.
- Meetings of all staff, as well as individual department discussions, have been held to outline the LBE process, strategy and what we mean by personal journeys.
- All staff and trustees engaged in a two-hour small group brainstorming/information gathering session on the topics of equity and inclusion.
- We held a series of emotional intelligence trainings to allow staff and trustees to feel more comfortable in engaging in dialogues around these issues, and also to encourage them to think about their own personal histories with equity and inclusion issues.

- We have developed a lending library of purchased and borrowed books relating to issues of equity, inclusion and diversity.
- We provided core team members with magazines they might not usually read as a way to explore the perspectives and concerns of communities of color as well as youth.
- We created a web site where information from all of our various meetings and surveys is available to all staff and trustees.
- Early on in the process, we sent out a communication regarding equity, inclusion and diversity, along with the book, *Searching for Uncommon Common Ground*, to all staff and trustees.
- We used this book's content and perspective as a basis for dialogue among staff and trustees.
- In January of 2003, we surveyed both staff and trustees to give us feedback on our LBE work to date.
- We developed a Foundation Values Statement focused on diversity, equity and inclusion.

5. Who Are the Key Players and What Has Been Their Work?

We have several sets of key players. One set would obviously be our core team of trustees and staff who have made significant commitments of time, and who have also committed to engaging in a personal journey around these issues. Our Board Chair and President have championed the cause of equity, inclusion and diversity, in board settings, as spokespersons for these issues at the California League of Community Foundations and in other public forums. Another set of key players is staff members who have stepped forward, both on a personal and professional level, and assisted us in many ways to bridge the gaps caused by our lack of financial resources for this work. California Tomorrow, the consultant to this initiative, is a key player, and has helped build trust and credibility among trustees and staff, who feel free to work with it directly as a resource and sounding board.

6. What Are the Major Accomplishments to Date?

We believe we have accomplished a great deal, especially considering the complexity of this problem and limited resources, both in terms of staff time and dollars.

- We have engaged individuals beyond the core team, both at the trustee and staff level, who are helping us to move our efforts forward. We have done a reasonably good job of adhering to the work plan we established for our LBE efforts.

- We provided training sessions on emotional intelligence that over 92% percent of our *staff and trustees* attended. We have begun to embed both the principles and the questions our LBE effort raises within the fabric of our work through our strategic planning process. It has been extremely rewarding to hear both trustees and staff who are not on our core team bring up issues and concerns around equity and inclusion in the strategic planning process.
- We developed a series of questions for each of the Foundation's standing committees, Finance, Asset Development, Board Development, Program, and so forth, to use as a discussion tool to address equity and inclusion in both our daily work and in our strategic planning efforts. These committee discussions are being led by department heads in partnership with members of our core team. These discussions are in process, and the results are being fed back to the core team and into the strategic planning process.
- In all of our internal sessions, people have wrestled with some of the difficult and often emotional issues that this work can surface. This has not been an easy or seamless process.
- LBE is on the radar for the majority of our staff and 75% of our trustees. The level of engagement may differ because everyone has begun the journey from where they were, but it seems that few are resisting the journey entirely. We have had and continue to have serious dialogues about what it means to think about the impact of race in our work (both formally and informally). We continue to have brown bag discussions on a monthly basis to discuss this work.
- Equity and inclusion principles have been included in our strategic plan.
- All teams have developed revenue neutral goals that have been put in their work plans (administration, community investments, development, marketing and finance).
- Weaving equity and inclusion into new grant processes (e.g., due diligence) and other goals is being discussed as we complete our reengineering work.
- In developing a new banking relationship, the Finance Team had all the banks present specific information on equity and inclusion practices. This information included Community Reinvestment Act and other aspects of the way they conduct business. The weight assigned to this information was key in making our final choice.
- The LBE Committee is advancing an equity and inclusion statement to the board for deliberation. This is a vital element of our work, as it will give us a guidepost in moving the work forward and in creating appropriate measurements for our efforts.

While EBCF has a long way to go to model how this work is done, the accomplishments are significant. There has been considerable investment in process and learning, and both have contributed to commendable short-term outcomes.

7. What Work Remains?

A lot remains to be done. We see ourselves at the beginning of a process that will take a decade to unfold. Over that decade there will be changes in both staff and trustees. If we continue on this path, we will build new levels of awareness and trust with our diverse communities and we will come to know things we don't now know, as well as things we don't even know that we don't know. We will implement changes incorporated in the strategic plan. We will review LBE in 2004, update our work plan and identify the next set of specific goals we want to achieve.

8. What Barriers Have We Encountered?

Most of the barriers encountered thus far were entirely predictable and come under the headings of discomfort with the topic, fear, confusion and lack of resources. Race, equity and inclusion are some of the hardest topics to discuss openly and honestly in this country. Discussing them in the workplace creates an added difficulty factor. In the beginning, many people had some degree of confusion about what we were trying to do. We found that despite many communications and a conscious effort to be clear, some residual confusion persisted, much of which we believe came from people's discomfort and fear of dealing with these topics and their workplace implications. Some of this fear was universal but, in many cases, it had very different origins. Some people who had been through these efforts before bore the scars of processes that were unsuccessful. Others, many of whom have been the victims of institutional racism, were skeptical and remain skeptical of our ability to stick with the issues through the hard discussions and over the long haul. Still others worried that this effort might cast them

as less valuable players in the work of the Foundation, or in fact at the heart of the problem, i.e., white people concerned that this would be an occasion for blame and the initiation of some process based on a level of political correctness that would make them uncomfortable to be in the organization.

Clearly we have to manage very differing expectations on what progress means. We have a multi-generational multi-racial staff, some of whom feel there have been great strides made in race relations, while others feel that we are lagging behind. This, of course, means that we have to have open dialogue, clear communication, and be willing to revisit issues even after many people feel that we have resolved them.

In order to overcome these barriers, we need to remind everyone with great regularity that we are taking the long view and request their patience with the process. Additionally, we need to allocate as many internal resources as possible. When trying to engage and communicate with both staff and trustees, we are reaching out to a universe of 70-plus very busy people. This requires the ability to have our web site up-to-date and functional at all times and that we take the time to communicate both by phone and e-mail as well as in small meeting settings with all those involved. If this effort is really important, it cannot be staffed by volunteers, but rather needs to have the appropriate level of resources to allow us to make progress in a measured and respectful manner.

The Future

Both board and staff are committed to moving the diversity, equity and inclusion agenda of the Foundation forward. It will take time, money, and the assistance of our community and philanthropy to succeed, but we believe that with appropriate investment and commitment we can achieve our LBE work plan goals and objectives. Clearly this is important work and work that must be done if we are to successfully adapt to the changing needs of our communities.

For more information, contact:



Michael M. Howe, President
Diane Sanchez, Program Officer
East Bay Community Foundation
mhowe@eastbaycf.org
dsanchez@eastbaycf.org
Phone: (510) 208-0823



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15639 Leavenworth Road • Basehor, KS 66007-9768
www.cfy.org • 800.292.6149