



Diversity, Inclusion, & Equity in Community Foundations

From Dialogue and Assessment to Action through Planning

There are many approaches and tools for planning to strengthen your organization's principles and practices around diversity, inclusion, and equity. Ideally, those approaches and tools should be fairly standard and applicable to many types of organizations; however, because issues of diversity, inclusion, and equity are approached so differently by a community foundation's various stakeholders, we believe the planning process used by community foundations should remain an iterative process. More specifically, because dealing with issues of diversity, inclusion, and equity is so challenging for people from diverse backgrounds and experience, the planning process needs to include both dialogue (to sort out values, definitions, intents, priorities, and strategies all stakeholder groups can buy into and support) and learning (to ensure all stakeholders are developing the knowledge and skills needed to participate constructively in this *strategic alignment* process).

The dynamic approach we have suggested will allow the leaders of your foundation to use the information and analysis that emerges from their various organizational assessments and discussions to inform their planning efforts to *align* the foundation practices with its' equity values, principles, and objectives. Like other foundations, your team may find that the creation of a core leadership group (that is representative of the foundation diverse stakeholders) charged with steering this planning process will help insure smoother integration of objectives and plans.

In this meeting your leadership team will get the opportunity to discuss and select planning approaches for engaging the whole foundation in this process.

Overview of Session:

Exercise and Discussion of planning approaches to undertake and sustain a coordinated strategy for foundation-wide:

- Dialogue about Diversity and Equity
- Reflection and Assessment
- Learning (individual and organizational)
- Planning for Action.

The Power of Culture

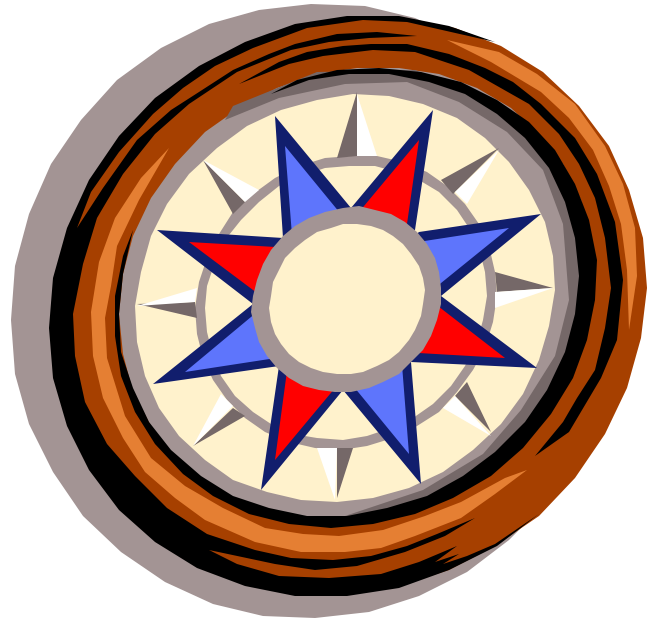
“Caminante, no hay camino. El camino se hace al andar.
[Sojourner, there is no road. We make the road by walking.]”

Antonio Machado

Team Exercise on Organizational Change Strategies:

Before jumping into planning for organization-wide engagement, your leadership team may want to explore what each of you believe are the essential elements of organizational change to strengthen inclusion and equity principles and practices. Designed as a small group activity for mixed teams (staff, trustees, and senior management), the following exercise will help you surface a wide range of ideas that may not already be part of your day to day planning culture.

Break up into small groups. Pay attention to diversity and organizational experience/roles in your selection of teams. Give each team a copy of Rainbow Research's Stages in the Journey Continuum (Chart on pages 14-15). Then teams are sent to different parts of the room, with chart paper and pens. Each team will have 30-40 minutes to discuss the strategies and resources their team would use help another community foundation (not yours) move from Stage One through Stage Five. In this scenario each team is acting as a consultant firm to provide technical assistance, training, and coaching necessary to insure the community foundation is successful in assimilating new perspectives, paradigm, and practices.



Key elements that should be discussed:

What strategies or activities would you suggest the foundation undertake? What roles and responsibilities would you suggest for different stakeholders (trustees, staff, CEO and other executives, community and civic partners, etc.)? What resources, tools, and support would you make available to them?

How would you frame the process (what would they do first, second, simultaneously, etc.)? What concrete outcomes would result from the organizational change process? How much time would the whole process take? And, what financial and human resources would the foundation need to set aside to insure success?

Elements of Proposed Organizational Change Process

- Strategies & Activities
- Roles & Responsibilities
- Tools & Resources
- Technical Assistance & Support
- Timelines & Timing
- Outcomes
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After your team has discussed these questions and reached consensus on the key elements of the process, chart your proposed organizational change process. Then, select someone to report out your ideas to the leadership team.

Group Report Backs & Debriefing:

Take a few minutes to discuss any patterns that emerged between groups. Pay attention to any commonalities and innovations. Then, give your leaders a few minutes to review the following descriptions of the four interconnected LBE planning strategies we are suggesting your team embed into the foundation's culture and practice. These concepts and the insights developed through the previous exercise should help your team develop a strategy for foundation-wide engagement.

Leading By Example Planning Elements:

About Reflection and Assessment:

Although reflection and assessment is not always the place to start (i.e., sometimes urgent circumstances call for more immediate responses), as this initiative seeks to assist you in your efforts to clarify and embed your diversity, inclusion, and equity principles in the foundation's day-to-day (normal) processes and practices, reflection and assessment is a critical strategy to get a baseline picture of where your foundation currently is in its journey to becoming an inclusive and equitable grantmaking institution. At our last network meeting, we introduced a variety of approaches and tools for undertaking organizational reflection and assessment. At this meeting we shared two more approaches—for undertaking personal reflection and assessment. As you move into your planning efforts, we will also work with you to develop the best tool for assessing your organizational practices and culture.

About Dialogue:

Although we know dialogue around diversity and equity is challenging, we believe that collective learning and the new lines of communication that dialogue facilitates can greatly enhance cooperative efforts to address the foundation's internal and external inclusion and equity concerns in a more purposeful manner. Viewed from this standpoint, the dialogue we are suggesting is not intended to be a substitute for planning. Instead, the dialogue is intended to inform the development of strategic and concerted actions to embed diversity, inclusion, and equity concerns into the normal planning and development processes of each foundation.

About Learning:

Although we believe that building the capacity of individuals and organizations to embrace diversity and work for equity involves learning, we are careful to point out that training or professional development by itself will not significantly change either. While you might succeed in changing a person's thinking about diversity, inclusion, or equity, helping a person or organization to assimilate a new practice involves much more than training. In addition to training or professional development, individuals and organizations need to have opportunities and support to experiment putting their new knowledge, outlooks, intuitions, or sensibilities into practice. In recognition of this reality, throughout these materials we have talking about learning and capacity building from many different angles and approaches. This is because the learning process is not linear and involves many different pedagogical models. Rather than suggest one approach, we have suggested numerous, including: formal and informal assessment; topical discussions; formal professional development and board development workshops; individual and peer learning, etc. Ultimately, we know each foundation will have to determine which approaches to learning best fit the needs of the diverse set of stakeholders that will be engaged in this effort.

About Planning:

As is the case with other strategic issues organizations must respond to, through regular planning, goals and objectives, and strategies around diversity, inclusion and equity can be established for the foundation itself, for a broader community agenda, or to build the capacity of service systems foundations often support. Each of the foundations will have to take the time to consider how their diversity, inclusion, and equity concerns can be integrated into the normal planning and development processes of the foundation. Among the key planning issues the Core Leadership Group will have to address and reach consensus on are included:

- Development of organizational vision (which may include operational principles) and long-term goals and objectives around diversity, inclusion, and equity;
 - Prioritization of critical diversity, inclusion, and equity issues (from E-Scans) and/or core functions (e.g., governance, asset development, grantmaking, etc.) to be addressed; and,
 - Development of a strategic plan to carryout and sustain assessment, planning, learning, and action.
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Planning Framework & Next Steps:

Because every foundation's planning and decision-making culture is different, your leadership team will need to think creatively about ways to embed LBE change strategies in short and long-term planning and development. Likewise, given differences in how different foundations assimilate new ideas and practices, your leadership team will have to find a way to simultaneously organize assessment and planning with activities to support the individual and organizational learning needed to move this process forward.

The attached planning flow chart was developed by The East Bay Community Foundation to guide their work. We share it here to assist your team as it considers planning approaches integrate and harness the results of external and internal assessments and organizational dialogue to shape and inform your foundation's planning efforts. You may also want to review the work plans the foundation developed for each of their committees (see working tools section).

Whether your team chooses to undertake foundation-wide assessment or to focus on 1-2 key areas of foundation practices, we believe you will find the assessment and planning work-plans developed by the East Bay Foundation useful as your various committees get underway.

Objectives, Timelines, and Support for Next Phase of Work:

Data Collection and Assessment (continued & completed):

Development & On-Going Support for Core Leadership Group's Work:

Opportunities for Organizational Dialogue

Opportunities for Individual & Organizational Learning:

Strategy for Assessment & Planning:

About This Resource:

The concepts and planning flow chart presented in this session were developed in consultation with Ms. Cecilia Sandoval, who was a member of the California Tomorrow training and technical assistance team for the LBE Initiative. Ms. Sandoval is the Principal of The Sandoval Group, a consulting firm that provides a wide range of strategic planning services to civic, community, and philanthropic organizations.



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