

Leading By Example Peer Network East Bay Community Foundation Work Plan For 1st Cycle of Inquiry

Work as at team to realize the following objectives:

- **Identify, recruit, and establish a Committee of CF stakeholders (Board and Staff) who will review the data collected in this 1st Cycle of Inquiry and work to insure equity and inclusion issues are an integral element of the upcoming strategic planning process (scheduled for launching July 2002);**
- **Work with California Tomorrow (Rubén Lizardo, Ed Porter, and others as needed) to build the capacity of the committee members to take on this work (e.g., organize a day-long session similar to the January kick-off of the Leading By Example Peer Network)**
- **Collect and organize quantitative and qualitative data we feel will be most useful for the Committee to analyze and respond to;**
- **Work with Rubén Lizardo to insure the strategic planning process accounts for equity and inclusion concerns.**

Preliminary Organizational Capacity Building Strategy

Activities Planned Build Capacity of CF Stakeholders		Responsible	Resources	Due Date
To continue building the knowledge and capacity of our team to undertake this equity and inclusion project we will....	Identify, recruit, and establish a broader committee of CF stakeholders to undertake the 1 st Cycle of Inquiry and develop strategies to incorporate equity and inclusion concerns in the foundation's upcoming strategic planning	Mike, Helen, and Diane		
	Organize a daylong orientation for committee members. The orientation will draw on the strategies, tools, and resources used in the 1 st meeting of the Leading By Example Peer Network	Mike, Helen, and Diane	Rubén Lizardo and others at California Tomorrow	

	Each team member will develop and carryout an individualized learning plans to continue deepening our knowledge and capacity in the area of diversity, inclusion, and equity. As part of this effort, we will seek out and utilize a variety of resources (reading, videos, training, and etc). Additionally, we will devote some portion of our regular planning meetings to share individually about our personal experiences and learning.	All Team Members	California Tomorrow and other organizations that deal with equity and inclusion issues related to diversity	
Data Collection Strategy (Building on insights gained from Org Journey Map, Environmental Scan, and Org SWOT)				
Activities planned to complete our Community Profile		Responsible	Resources	Due Date
To develop a better understanding of the most urgent diversity and equity issues, dynamics and trends that are affecting the community or region we serve we will...	Collect the latest reports and studies that focus on demographic changes (and the implications of that change for various communities) occurring in the region	Lead Staff and All Committee Members		
	Each committee member will meet with at least 2 community leaders who are knowledgeable about implications of demographic change on the various groups in our region. These meetings will be informal and aim to build the committee member's understanding of how different communities view the demographic changes the urgency for foundation attention to diversity and equity issues, dynamics, or trends most affecting the community as a whole.	All Committee Members		
	We will meet as a team to share and discuss the information and insights we have gained through our respective data gathering efforts			

Activities Planned to Complete Our Foundation Profile	Responsible	Resource	Due Date
To develop a better baseline picture of foundation's current equity and inclusion performance at the operational level we will...	Collect a variety of quantitative data that focuses on race, ethnicity, gender, education, class, _____, _____, and _____.	Refer to California Tomorrow's Description of Important Quantitative Data	
To better understand what our foundation's current inclusion and equity values, philosophy and intents are we will...	The Committee will Review and examine relevant written documents that express the mission, objectives, and priorities of the foundation (e.g., mission, program guidelines, investment policy, past publications, etc.). We will consider whether our foundation's equity and inclusion values, philosophy, and objectives are clearly articulated or are there gaps and inconsistencies. Does the foundation hold itself accountable to the same equity and inclusion principles and criteria used to judge prospective grantee organizations?		
	Begin observing how the foundation reacts to those who raise diversity, inclusion, and equity questions in a variety of settings. Do our observations indicate the existence of overt or underlying resistance to dealing with inclusion and equity concerns?		
	Carry out informal meetings to gauge the interests and commitment of key stakeholder groups (board, donors, staff, community partners) for the equity and inclusion work your team plans to initiate.		

	<p>Meet as Committee to review and assess the approaches and outcomes of past diversity training experiences the foundation has sponsored for the purposes of building knowledge and capacity of staff and the board.</p> <p>In that session attention should be given to the following:</p> <ul style="list-style-type: none"> ○ Was the training adequate to bring about the desired objectives? ○ Were barriers or resistance encountered by the organizational leaders who promoted the training? ○ Was there any planned follow-up or other sustained outcome? ○ How could the training strategy, including outside resources used, be improved in light of your tentative capacity-building objectives? How would you evaluate progress or success? 	All Committee Members	Resources and readings provided by California Tomorrow at Peer Network meetings.	
	<p>Meet as a Committee to discuss the findings of our various data collection activities (qualitative, quantitative, and observational). What is the picture that is emerging for each of us about where our foundation currently is in terms readiness and capacity to undertake the org change strategies our team is considering for this initiative.</p>	All Committee Members		

Preparation for April Meeting of CF Network		Responsible	Resources	Due Date
	Committee meets to Summarize its Findings and Conclusions from the 1 st Cycle of Inquiry, including at least: <ul style="list-style-type: none"> ○ Is there a shared vision equity and inclusion means to the foundation? ○ Potential to reach an organization-wide consensus on the priorities & desired outcomes for this project ○ The Foundation's Current Capacity To Achieve Some of the Desired Outcomes ○ Resources your team will need to carry out next phase of work 	All Committee Members		1st Week of April
Incorporating Equity & Inclusion Concerns in Foundation's Strategic Planning (July 2002)				
	Discuss strategies to incorporate this work with our strategic planning consultants	Mike, Diane, Helen (??)	Rubén Lizardo and Cecilia Sandoval (???)	