

**EBCF LBE Progress Report for February 2003 LBE Network Meeting
Presented by Diane Sanchez**

1. *Briefly describe the plan of work you undertook at the beginning of this process.*

There were four major activities/goals that we initiated in putting together our Leading by Example Work plan.

1. To look internally and to 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 commit themselves to personal journeys with 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 our efforts by convening a team consisting of eleven trustees and staff to serve as the core team to guide these efforts.

2. *How did your team define success for this work, as it relates to creating a more diverse, inclusive and equitable organization*

We did not begin by defining success. We began by saying that we wanted to make sure that we provided a structure for highlighting meaningful opportunities for the voices that reflect our whole community are heard in the way we do our work. We also wanted to gather our own as well as external data that would allow us to measure our efforts and results.

We developed a two-part question 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 the 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 and we wanted to take every opportunity to:

- 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.

- To make sure that the way we do business, e.g., the selections of vendors, service providers, consultants, etc. is mindful of opportunities to form linkages with communities often left out or relegated to fringe aspects of the commercial process.
- To review the process for recruiting trustees, as well as using their skill sets, valuing their different perspectives and life experiences.
- To make our facilities available to all our constituencies and stakeholders.
- To identify and address the institutional racism that significant parts of our community face, and to look for opportunities to openly surface and lessen the impact of this legacy.

3. *What organizational strengths and assets (in regards to diversity, inclusion or equity) did you identify through your various assessment efforts? What weaknesses or gaps did you identify through your various assessment activities?*

- Our grant making process is inclusive, with 92% of our grants serving communities of color.
- Our management team is not racially diverse although it includes other dimensions of the East Bay's diversity.
- We collect and use race, gender and economic data on the programs we fund but we can not track or aggregate that information as it is not entered into our data-base.
- 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 larger 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 strategies have you used so far to engage other foundation stakeholders in your internal organizational change efforts related to diversity, inclusion and equity?*

Our efforts, to date, have been totally internally focused, but we have been successful in engaging the majority of our trustees and staff. This includes staff that works on Foundation initiatives and are not in the foundation building. We have used the following strategies to attempt 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.
- All staff meetings as well as individual department discussions have been held, outlining 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 topic of equity and inclusion after a board meeting.
- We held a series of emotional intelligence trainings with Ed Porter 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 had 92% turn out for these sessions.
- We have developed a lending library and 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 find out the perspectives and concerns of communities of color as well as youth.
- We also created a web site where we have all of our information from all of our various meetings and surveys available to all staff and trustees.
- Over the holidays, we sent out another communication regarding equity, inclusion and diversity, along with the book, "Searching for Uncommon Common Ground", to all staff and trustees.
- We plan to use this book and its contents and perspective as a way of establishing some common ground for dialogue, among staff and trustees.
- In January, through a survey we asked tool both staff and trustees to give us some feedback on our LBE work to date.

5. *Who have been the key players, their interest in the work, and their capacity and involvement in playing an important role?*

We have several sets of key players. One set would obviously be our core team of trustees and staff who have made a significant commitment of time, and who have also committed to engaging in a personal journey around these issues. Our away-team of Mike, Helen and Diane, have made an additional commitment of time. Our chair, Helen has championed the cause of equity, inclusion and diversity, both in our own board setting, and as a spokesperson for these issues at the California League of Community Foundations and in other public forums. Another set of key players are staff members who have stepped up to this issue, 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. This was recently evidenced by staff members' willingness to step up and join the core team, when two of our core staff members left the organization. Ruben Lizardo has become a key player, as he has built trust and credibility that allows staff to feel free to work with him directly as a resource and sounding board for our work.

6. *List the major accomplishments of your efforts to date.*

We believe we have accomplished a great deal, especially considering the complexity of this problem and our lack of resources, both in terms of staff time and dollars. We have an active and engaged core team, as well as individuals who are not on the core team, both at the trustee and staff level, who are helping us to move our efforts forward. We established a work plan and have done a reasonably good job of sticking to that work plan 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 truly 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 that are not on our core committees bring up issues and concerns around equity and inclusion in the strategic planning process.

We have developed a series of questions for each of the Foundation's standing committees, Finance, Asset Development, Board Development, Program, etc, 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.

Our smart growth initiative director attended a national conference that addressed equity and inclusion concerns and highlighted our work.

In all our internal sessions people have engaged and worked with some of the difficult and emotional issues that this work can surface, this has not been an easy or seamless process.

We are engaged in discussions with other funders in an attempt to find resources to not only continue this effort internally, but also to start the process of moving our Leading by Example work into the communities we serve.

7. Briefly describe the status of the work at this time.

As mentioned in the previous question, we are currently trying to incorporate the work of the various standing committees into the strategic plan and looking at the strategic plan to make sure that the LBE principles are reflected appropriately in its product. In addition, our core team which has spent more time on its personal journey than perhaps other trustees and staff, has raised the issue of moving away from just process and analysis work to having more in-depth and meaningful discussions around the impact of racism in our society as a group. We are looking for resources to continue our efforts.

At this point of the work our lack of resources in terms of staff time and dollars to be spent for assistance is starting to hurt us. This is a very difficult time in the foundation world financially, and there are many demands on all of our time. It is becoming harder to keep the LBE work at the forefront of our overall efforts, as we are being pulled in a number of directions. Our inability to hire temporary help or consultants to take on pieces of the work, facilitate staff meetings, etc, is beginning to show in some staff and trustee frustration around LBE progress. This is a critical juncture in our work as we have raised expectations by the work done so far and now we must find a way to “walk our talk”. If we are not able to get the necessary resources or find a way to manage expectations we may find enthusiasm for this work replaced with skepticism.

8. What remains to be done? What are your short-term objectives? What are your long-term objectives?

A lot remains to be done. We see ourselves at the very beginning of a process that will take a decade to unfold. Over that decade there will be changes in both our staff and trustees. If we continue our work 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.

In terms of our immediate work plan, we are still in Phase 2 of the plan, which means that we are about 30 days behind. We are doing the work of aligning our LBE work with the strategic plan and once that is done, we will begin to develop an appropriate set of metrics to be able to measure our efforts. Our current plan for Phase 3, which will in all likelihood begin in May, is to continue implementing changes suggested at the committee level as part of the strategic plan. We are thinking about a review process for LBE that would take place six months after our strategic plan is accepted. We believe that our LBE efforts may take an extra reviewing and tweaking process before they are totally aligned and integrated with the strategic planning process.

9. *Has your team developed a plan to support your foundation in achieving these objectives? Have the foundation trustees ratified the plan and allocated resources for the plan?*

We are in the process of developing the plan. The Foundation trustees have not ratified it, nor have there been specific resources allocated.

10. *What have been the key barriers that your team encountered in undertaking this organizational change work?*

Most of the barriers that we encountered so far were entirely predictable and come under the heading of discomfort with the topic, fear, confusion and lack of resources. Race, as well as equity and inclusion are some of the hardest topics to discuss openly and honestly in this country. Discussing these topics in the workplace creates an added difficulty factor. In the beginning, many people were confused or not clear on what it was we were trying to do, and we found that as many times we communicated and as clear as we thought we were being, there remained some residual confusion, 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 time. Still others worried that this effort might cast them as less than valuable players in the work of the Foundation, or in fact, at the heart of the problem, based on their own racial background, i.e., white people feeling 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 who 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.

Our lack of resources is our biggest barrier. Many of the discussions that are needed around expectations could be had if we had the money and staff time for facilitation of this process. Not having a budget to convene additional meetings, have food at meetings, look for outside experts to address certain issues, or for opportunities for staff development makes the process more difficult. In order to overcome these barriers, we need to remind everyone constantly that we are taking the long view and continually request their patience with the process. Additionally, we need to allocate as many internal resources as we can, and at the same time, search for external dollars to help us with this process. For example, when trying to engage and communicate with both staff and trustees, and we are reaching out to a universe of 57-60 very busy people. This requires the ability to have our web site up-to-date and functional at all times and to be able to take the time to communicate both by phone and e-mail as well as small meetings 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.

11. Have they been overcome? If “No”, what additional strategies will you use to overcome them? And 12. What assistance/resources do you think might be needed to successfully integrate this work in the internal systems, policies and culture of the community foundation?

No we have not overcome all the barriers. In fact we know that haven't encountered all the barriers yet.

- We are however looking for additional resources internally and externally.
- Both staff and trustees have taken advantage of several free convening's within our area, around race, gender and equity, to deepen their personal knowledge, as well as bringing best practice information back to the Foundation.
- We are exploring ways to allow trustees and staff who want to deepen their own discussions and awareness about racism an avenue to do so within our processes.
- We are adding a member to our core committee who is neither staff nor trustee but who works for a company considered by Fortune magazine to be one of the best places for people of color to work and heads up a group dedicated to reaching diverse communities.
- We need time and patience to change, and in some cases, add to our current work practices.
- We are exploring development of a policy statement around equity and inclusion that would become part of our communications.
- We are working with our branding consultants and internal committee to find and integrate data about communities of color into the formation of our brand strategy.
- As part of our branding work we are looking to reach high net worth individuals from communities of color. Currently we are planning for a focus group of high net worth African Americans and will follow this work with other targeted focus groups.