Session Objectives:

- Make connections between systemic and institutional oppression and the implications to our sector’s work;
- Discuss how equity connects to mission, vision and values
- Review frameworks for building organizations where belonging and difference are celebrated.

Agreements:

- Start/end on time
- Practice self-care
- Create space for multiple truths
- Keep focused on our common goal
- Be mindful of privilege
- Move up/back
- Supportive Space
- Use “I” statements
- One mic, one rock star; listen deeply
- Be willing to be uncomfortable
- Be kind and brave
- Look for learning
- Expect unfinished business
- Uphold confidentiality

Agenda:

<table>
<thead>
<tr>
<th>Time</th>
<th>Activity</th>
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<tbody>
<tr>
<td>9:00-10:00am</td>
<td>Arrive &amp; Settle In</td>
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<tr>
<td></td>
<td>Introductions, Context Setting</td>
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<td>- Since we last met what’s opened up for your or changed as a result of what you learned?</td>
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<td>- What more would you like to discuss or learn?</td>
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<td>- Did you take the Fakequity Pledge?</td>
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<td>10:00-10:30am</td>
<td>Building Race Explicit Cultures</td>
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<td>- Video</td>
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<td></td>
<td>- Org Workshop (plan to review/discuss your mission, vision and values)</td>
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<tr>
<td>10:30-11:15am</td>
<td>Review of DEI Frameworks</td>
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<td>- Group work - how can we apply these in our organizations?</td>
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<td>- Barriers? Low hanging fruit?</td>
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<tr>
<td>11:15-11:30am</td>
<td>Appreciations, Evaluations &amp; Close</td>
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<td></td>
<td>Please share something or someone you appreciate today.</td>
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<td>Closing Question: What’s changed for you?</td>
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Phase 1: Prepare for Start-Up

Before introducing organization-wide diversity efforts, senior-level staff and the board of directors should learn as much as possible about implementing a diversity process. They should also identify internal and external resources that they can rely on for support and assistance, e.g., staffing and financial.

Familiarity with how other organizations have successfully managed an organizational change process can build commitment and enthusiasm. It can also create a sense of empowerment which may diminish the anxiety of venturing into uncharted waters.

While it only makes sense to be well-prepared before undertaking a diversity initiative, this preparation will almost certainly fortify the initiative during lag times and when these efforts are met with resistance.

Key Participants
- An organization's director/CEO should be the visible leader and spokesperson for achieving diversity.
- The board of directors should be involved from the outset.
- With leadership in place, a diversity coordinator(s) should be selected and given specific responsibilities and direct access to top management.
- A diversity committee should be established with representation that reflects the diversity of the organization and as many levels of the organizational structure as possible.
- If it is feasible to invite representatives of the groups served by the organization to join the diversity committee, they will add other vital perspectives.
- The organization may also consider hiring a consultant to assist with further planning and implementation.

Action Steps
1. To help build an effective working team, engage planners and leaders in team-building experiences, and provide educational materials about diversity and organizational change.
2. Determine a budget for the diversity initiative.
3. Identify various individuals including board members, senior or front-line managers.
4. Clarify time commitments and expectations for all participants.
5. Establish a calendar of regularly scheduled meetings for diversity planners.
6. Establish a short-term plan for the next stage of the initiative.
7. Consider hiring a consultant to assist with planning and implementation.

Timing
The executive director/CEO and the board of directors must determine when the diversity initiative should begin and whether or not there is a projected timeline for its implementation. Once these decisions have been made, it is time to schedule an event to kick off the initiative and give it recognition throughout the organization.
Phase 2: Establish a Framework

A substantive framework will help the organization build and reinforce the commitment to the diversity initiative, and respond to pressure from internal and external sources of resistance. There are several key components to the success of any initiative:

- A clearly articulated philosophy and vision about diversity and its connection to the mission of the organization
- Clarity about terminology such as diversity, inclusion and cultural competence, and working definitions of diversity and inclusion
- A “business” case for diversity which outlines the ways in which diversity can improve operations and enable staff and volunteers to more effectively meet the needs of those being served
- Expected outcomes stated with measurable language
- The concept of safety
- Candor

The concept of safety is a crucial component of the framework. Organizational leaders must create an environment in which all members of the organization feel they can participate and share their perspectives honestly without fear of reprisal.

Candor is essential in the assessment process if the resulting plan for diversity is to be accurate.

Key Participants

Organizational leaders must continue active involvement and should issue an open invitation for staff members to join the diversity committee as a way of creating “ownership” in the initiative. Participants should reflect the demographics and operational levels of the organization.

However, individuals who are people of color should not be expected to speak for that group as a whole. As participation in the initiative broadens, organizations should be sensitive to power dynamics. True inclusion will require shifts in power.

Action Steps

1. Define organizational culture by considering such factors as philosophy, policies and practices, interpersonal dynamics and work environment.

2. Articulate the benefits and motivations for becoming a more diverse organization.

3. Define what the organization will look like when it becomes more diverse within the context of mission.

4. Identify other organizations, both locally and nationally, that might serve as models for diversity efforts.

5. Develop a realistic action plan for diversity efforts that takes into account ongoing operations and competing priorities.

6. Develop criteria to measure success. In other words, begin to build an evaluation plan.

7. Create a safe environment for candid and honest participation.

Timing

Set fixed times for diversity committee meetings. Begin to schedule meetings and events to build momentum for the initiative, being certain that meetings and activities are accessible to those they are intended to include. Staff time for the diversity initiative should be incorporated into staff work plans so that the effort is not viewed as ancillary to their other responsibilities.
Phase 3: Begin Implementation

The first two phases set the stage for the diversity initiative. At this point, implementation begins in earnest and activities become more visible as organizational interventions.

During this phase, the organization continues to build knowledge through needs assessments or a cultural audit, and is able to identify issues and themes that relate to diversity. It also sorts out other issues that represent general organizational and management problems. The assessment can also help identify existing resources and other strengths which can be very encouraging.

A comprehensive needs assessment will gather data about interpersonal behavior, organizational culture and systems that impact people. The findings of various audits and assessments can be used to develop a strategic plan to address diversity-related concerns.

Lending objectivity to the information gathering process is critical. If a consultant has not been engaged up to this point, now would be the time to work with someone who has knowledge of organizational development issues and experience with diversity initiatives.

As different members of the organization become involved through various activities, expectations and reactions begin to emerge. If not already evident, resistance is likely to occur as increasing time and attention are given to the diversity initiative. It is essential to have a communication plan in place to support the process that is underway.

If a strategic planning process is underway, outcomes of the assessment can inform the planning process. If the organization is working within an existing strategic plan, those goals and objectives should be reviewed at the outset of creating the diversity framework.

Key Participants

The diversity committee will plan and oversee the needs assessments and/or audit, and take responsibility for developing a diversity plan based on the findings. Managers should have input and be prepared to communicate plans to their respective departments and to help build commitment.

Action Steps

1. Engage the services of an experienced consultant.
2. Conduct a needs assessment or cultural audit among staff, board members and constituents, when appropriate, of the organization, or at least among a representative sample. And communicate findings throughout the organization. Audit organizational demographics, systems, policies and procedures.
3. Determine priorities within the context of the strategic plan and a realistic timeline, considering resources such as staff time and ongoing operations.
4. Set relevant, pragmatic and achievable goals for bringing about organizational diversity. Articulate expected outcomes and measures of change.
5. Use meeting agendas, newsletters, memos and other forms of communication to publicize the diversity process and accomplishments of the initiative to date and to outline the next steps.

Timing

Allow sufficient time to ensure that the needs assessment or cultural audit and planning process are not rushed or forced.
Phase 4: Integrate Diversity and Organizational Goals

In many ways, this stage is the linchpin of a diversity initiative. Individuals at all levels of the organization become involved through education and training programs, while diversity committee members continue to review existing policies and procedures as they relate to diversity. As more individuals are involved, communication efforts should be enhanced.

All activities should be monitored to determine their effectiveness in supporting diversity goals. Adjustments should be made as necessary. Data gathered at the conclusion of specific activities will also contribute to the overall evaluation process.

Key Participants

Senior management and other key staff throughout the organization should remain actively involved and should seek feedback and accountability from managers and others instrumental in moving the various action steps forward.

Action Steps

1. Employ consultation and technical assistance and appropriate training to promote diversity goals. All efforts should be pragmatic in their approach relating to daily operations and presented in a positive way.
2. Call upon skillful consultants to implement activities and place diversity efforts within the context of the total organization.
3. Seek ongoing feedback from participants as a way to refine the relevance of activities and monitor overall progress. Ask, How does the organization implement inclusive practices?
4. Anticipate reactions and issues that will surface and have guidelines in place to address them.
5. Use a variety of strategies to communicate about the diversity process, while reinforcing the connection of diversity activities to the larger goals and mission of the organization.
6. Establish committees with representatives from different areas of the organization to review policies and practices that relate to diversity concerns.

Timing

Schedule and announce upcoming events with adequate lead times. Be certain that major diversity-based activities are scheduled at optimal times and that individuals are acknowledged for their role and participation.
Phase 5: Evaluate Progress
Informal evaluation should take place throughout a diversity initiative to revise and refine specific activities. But it is also essential to engage in a formal evaluation with a design and methodology that will assess overall organizational change and measure the impact of diversity efforts. In undertaking an evaluation, organizations should anticipate three types of outcomes:

- progress
- no progress
- unexpected change

Be prepared to address each.

Key Participants
A consultant can bring a broad and objective perspective to the task of evaluation. In many cases, one consultant may be able to provide an important thread of continuity by fulfilling a number of responsibilities from assessment to planning to evaluation.

At each stage of the diversity initiative, however, the organization should make sure that the consultant has the appropriate skills. A consultant’s familiarity and experience with your type of organization can yield results more effectively.

While the consultant may take the lead in evaluation, the diversity committee should give direction to the consultant and remain actively involved throughout the process.

Action Steps
1. Focus the evaluation on the measurable goals and objectives of the diversity initiative.
2. Use a comprehensive approach to evaluate individual change as well as changes in organizational systems. Gather data through multiple methods and from multiple sources.
3. Identify barriers and enablers to achieving diversity and inclusion to help guide subsequent efforts.
4. Communicate findings throughout the organization to build knowledge and understanding.
5. Acknowledge and celebrate even the slightest increment of progress.

Timing
In practice, evaluation begins at the earliest stages of the initiative and continues throughout. Including evaluation as an ongoing component of a diversity initiative design allows for the flexibility and refocus necessary to stem resistance—and keep the process moving forward.
1. What are the biggest priorities for the organization in the next 3 years?

2. What are the internal factors impacting the ability of the organization to carry out its work (people, facilities, funding, expertise, geography)?

3. What are the external factors and forces impacting the ability of the organization to support its mission?
DEI VISION
Tell the story of what it looks like 5 years from now if your organization has racial equity in the center.

PROUDS
What makes you proud of your work at your organization? What is wonderful about this organization? What are its strengths?

1.

2.

3.

4.

5.

Think of prouds you listed above and how the organization might build off of these in the future.

It’s 2025 and Youth Justice Fund is thriving! Consider what’s happening as a result of our work today and in years to come. What do you see?

1. Close your eyes and visualize the activities, environment, interactions, environment, objects and users you see.
2. Next, jot down what you saw.
3. Use the graphic below as a guide

<table>
<thead>
<tr>
<th>ACTIVITIES</th>
<th>ENVIRONMENT</th>
<th>INTERACTIONS</th>
<th>OBJECTS</th>
<th>USERS</th>
</tr>
</thead>
<tbody>
<tr>
<td>What is going on?</td>
<td>Where is the activity</td>
<td>Who is involved?</td>
<td>What are the objects or</td>
<td>Who is there?</td>
</tr>
<tr>
<td></td>
<td>happening?</td>
<td></td>
<td>devices</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Why is it going on?</td>
<td>How are people engaging</td>
<td>people have in their</td>
<td>What are their roles and</td>
</tr>
<tr>
<td></td>
<td></td>
<td>with one another?</td>
<td>environment and how do</td>
<td>relationships?</td>
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NEW SOLUTIONS FOR NONPROFITS

3
Anything that should be removed or modified?
Anything missing or need clarification?

Are these the right values?

Our approach to this work is grounded by the following beliefs:

**GUIDING PRINCIPLES/VALUES - HOW WE DO THINGS AROUND HERE**

<table>
<thead>
<tr>
<th>Activitiest</th>
<th>They go there where and how did the environment involved?</th>
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<tbody>
<tr>
<td>their role in the organisation</td>
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STRATEGY SCREEN FOR EFFECTIVE DECISION MAKING

A Strategy Screen is a tool to determine, in advance, the criteria for adopting any new strategy or to answer a "Big Question" facing the organization. It creates greater awareness of what is important (mission, vision, values), how options line up with what is important, and provides greater consistency and intentionality in strategic decision making. Decisions made in violation of the criteria will be made knowingly and collectively.

The MISSION\(^1\) of

Our VISION\(^2\) is:

Our VALUES\(^3\):

Our KEY CONSTITUENCY: .

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\(^1\) Mission answers the question: Why do we exist?
\(^2\) Vision answers the questions: Where are we going? What is our desired future state?
\(^3\) Values address the questions: How do we behave? What do we want others to know about how we conduct business?
How can you use these criteria effectively to guide decisions?

Should be addressed:

Be sure to take into account the racial equity impact assessment guide? What filters

COMMUNITY SUPPORT

Does this decision leverage our relationships with our partners?

Does this decision leverage our unique strengths?

ADVERSE OUTCOMES (Are we the "right" organization?)

Does this decision leverage our competitive advantages?

geoGRAPHIC SCOPE

Does this decision meet our organization's criteria in regards to:

Will it benefit a few people significantly? Or many people slightly?

Does this decision benefit our key constituents?

Does this decision meet our goals or other community needs? How will it impact our capacity to honor and meet the goals of our other constituents?

If we make the decision to proceed with this decision, how will it plan to build capacity to respond?

If we don't have the current capacity, do we have a responsible

KNOWLEDGE/SKILLS, FINANCIAL RESOURCES

Do we have the organizational capacity to implement it in a timely manner?

How does the decision align with our values?

Do we understand the likely outcomes of this decision?

Does it bring us closer to achieving our vision?

Is this consistent with our mission?
Thank you for being here today!

As we come to a close:

1. If there is something or someone you wish to appreciate, please share.
2. Please complete your evaluation.
3. What are our next steps?