

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

Critical questions your team wants to examine to determine: (1) the potential for garnering organization-wide support for those objectives and (2) what your foundation's current capacity is to achieve those objectives:

(1) Identify potential areas of organizational change after review of internal gaps during data collection.

(2) Connect D & E project work with the work of CFGNH organizational culture committee.

(3) Use our internal work through the D & E project to lend credibility to our Communities of Color Initiative.

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 Team Members	3.29.02	
	Each team 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 team 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 Team Members	Note: Will be scheduled as collective meeting with Team Members and CFGNH senior management team; 6 community leaders will be invited, with the probability of 4 attending.	First week in April
	We will meet as a team to share and discuss the information and insights we have gained through our respective data gathering efforts			3.4.02 4.12.02

Activities Planned to Complete Our Foundation Profile		Responsible	Resource	Due Date
To better understand what our foundation's current inclusion and equity values, philosophy and intents are we 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.	Lisa McGill	1.) Annual Report (2001-2002) 2.) Mission Statement/Vision Statement 3.) Towards a Community Building Model 4.) New Haven Foundation Policy Guidelines	4.4.02
	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?	All Team Members	1.) Data Collection Process 2.) Organization Culture Committee Presentation 3.) All Staff Meeting	3.8.02 3.8.02 3.12.02
	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.	All Team Members		3.12.02
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 _____.	Lisa McGill	Refer to California Tomorrow's Description of Important Quantitative Data	4.5.02
	Meet as a team 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.	All Team Members	Note: Meet as Prep for Full Staff Meeting & Debrief of Conversations with Community Leaders	4.8.02

Preliminary Organizational Capacity Building Strategy		Responsible	Resources	Due Date
To continue building the knowledge and capacity of our team to undertake this equity and inclusion project we will...	<p>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.</p>	All Team Members	California Tomorrow's Change Starts With The Self Assessment Tool and Planning Guidelines	
	<p>Meet as a team 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 Team Members	<p>Readings & Resources provided at the January Network Meeting.</p> <p>Note: At All Staff Meeting</p>	4.12.02

Preparation for April Meeting of CF Network		Responsible	Resources	Due Date
	<p>Meet to Summarize Your Findings and Conclusions from the 1st Cycle of Inquiry, including at least:</p> <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 Team	Note: At Prep meeting for full staff meeting.	4.8.02