

**EAST BAY COMMUNITY FOUNDATION  
LEADING BY EXAMPLE  
PROGRESS REPORT 10-29-03**

EBCF is attempting to address the issues not of just “diversity” but of equity and inclusion in the context of the significant social baggage we all carry around these issues. EBCF is already quite diverse having 9 persons of color of a total of 22 Board members and of the 20 staff, 9 are persons of color. Obviously if we were just about a balancing act, our job would be pretty close to being done.

Clearly, we believe that our challenge is bigger and more important as we want to speak to what type of community we are helping to build and sustain. Our being able to Lead By Example can only work if we take the time to define, understand and marry this work with all aspects of what we do.

This work requires careful (but not timid) leadership, strategy and specific tactics and the ability to distinguish among the three.

Just by entering into this process we are showing leadership and making our commitment public. We are raising expectations among our trustees, staff and in the community.

At the outset we decided to work through our board and staff committee structures. This was a strategic decision that supported the goal of embedding the values of equity and inclusion in the way work is done at EBCF. It also means that it will take time for the questions we have posed to work their way through the committees, become embedded in the Foundation and have the desired impact.

This is a process of inquiry and action that will by its very nature and by the unresolved history of this country on issues of race, gender, sexual orientation and ethnicity make everyone defensive and uncomfortable at some point. Managing this discomfort is both a personal and an organizational issue. If we let this discomfort drive us towards neat packages and controlled responses our effort will not be very fruitful. As a result we have invested a substantial amount of time in working on the organizational and personal levels.

Trustees and staff have worked to increase their understanding of the issues that frame equity and inclusion as they present themselves currently, to set goals, commit resources, make hard decisions, live with some discomfort and measure progress. We also must be prepared to pass the baton to those who follow us as it would be arrogant to believe we can make all the decisions and progress around equity and inclusion in the near future.

EBCF as an institution, our community and the field of philanthropy have a lot at stake as demographics will continue to change and many of the current practices and structures

will not serve us well. Identifying, making and sustaining the necessary changes to achieve inclusion and equity is our task and it will be our task for the foreseeable future.

### **1. *Our Plan Of Work***

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 of trustees and staff 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 Will We Define success?***

We did not begin by defining success. We began by saying that we wanted to make sure that we provide a structure so that 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 these 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:

- 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.
- 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.
- Review the process for recruiting trustees, as well as using their skill sets, valuing their different perspectives and life experiences.
- Make our facilities available to all our constituencies and stakeholders.
- 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 Are Our Organizational Strengths and Weaknesses?***

- Our grant making process is inclusive, with 92% of our grants serving communities of color.
- Our management team is not as racially diverse as it might be although it includes broad dimensions of East Bay's diversity.
- We collect and use race, gender and economic data for the programs we fund but currently we do 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 Is Our Involvement In LBE?***

Our efforts, to date, have been totally internally focused. As a result we have been successful in engaging the majority of our trustees and staff. This includes staffs 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 around the issues of diversity, equity and inclusion.

- 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.
- We held a series of emotional intelligence trainings 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.
- Early on in the process we sent out a communication regarding equity, inclusion and diversity, along with the book, "Searching for Uncommon Common Ground", to all staff and trustees.
- We used this book, its contents and perspective as a way of establishing some common ground for dialogue, among staff and trustees.
- In January of 2003, we surveyed both staff and trustees to give us some feedback on our LBE work to date.
- We have developed a Foundation Values Statement focused on diversity, equity and inclusion.

##### ***5. Who Are the Key Players And What Has Been Their Work?***

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 Board Chair and President have championed the cause of equity, inclusion and diversity, both in board settings, and as spokespersons 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. California Tomorrow, the consultants to this initiative, is a key player, as they have helped build trust and credibility amongst trustees and staff to feel free to work with them directly as a resource and sounding board for our work.

##### ***6. What Are the Major Accomplishment 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 who 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.

In all of 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.

So what have we achieved to date:

- **Staff Engagement:** LBE is on the radar for the majority of our staff and 75% of our trustees. The level of engagement may differ but everyone has begun the journey from where they were and it seems that few are resisting the journey entirely. We have and continue to have meaningful dialogues about what it means to think about the impact of race in our work. (both formally and informally). We continue to have brown bag discussions on a monthly basis to discuss this work.
- **Strategic Planning:** Equity and inclusion principles have been included in our strategic plan.
- **Team Goals:** All teams have developed revenue neutral goals that have been put in their work plans (administration, community investments, development, marketing and finance).
- **Community Investments** is weaving equity and inclusion into new grant processes (i.e. due diligence) and other goals are being discussed as we complete our reengineering work.
- **Finance:** In developing a new banking relationship the Finance Team had all the banks present their specific information on equity and inclusion practices. This information included CRA and other aspects of the way they conduct business. The weight assigned to this information was key in making our final choice.
- **Value Statement:** The LBE Committee is advancing an equity and inclusion statement to the board in December of 2003. This is a key element of our work, as it will give us a guidepost in moving the work forward and in creating appropriate measurements for our efforts.

EBCF has a long way to go to model how this work is done. The accomplishments are significant both in terms of investment in process and learning and also in terms of short-term outcomes but we have a much farther to go before we claim success.

### **7. *What Work Remains?***

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.

We will implement changes suggested at the committee level as part of the strategic plan. We will review LBE in January to update our workplan as well as identify specific goals we want to achieve in 2004.

### **8. *What Barriers Have We Encountered?***

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.

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. For example, when trying to engage and communicate with both staff and trustees, and we are reaching out to a universe of 70 plus 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.

### **The Future**

Both board and staff are committed to moving our diversity, equity and inclusion agenda of the Foundation forward. It will take time, money, and the assistance of our community and philanthropy to succeed, but we believe that with an appropriate investment of both time and money we can succeed in achieving our LBE workplan goals and objectives. Clearly this is important work and work that must be done if we are to successfully adapt to the changing needs of our communities.