

Get Ready Practice Equity Daily



Living United:
A Guide for Becoming a More Equitable Organization





United Way Colleagues,

Our mission is to empower individuals to achieve their full potential to lead a better life. We envision sustainable, inclusive and resilient communities that mobilize donors, advocates, volunteers and partners to join us on fighting issues impacting individuals in our communities.

We will win this fight by being more intentional and providing experiences and opportunities for individuals to scale their impact, act and support in ways that are engaging, meaningful and transformative.

As we work to execute our strategy, we know that individuals and families in our communities will face significant barriers to achieving their potential. On every measure of well-being, outcomes are predictable based on race and ethnicity. Black, Latinx, Indigenous, and some Asian individuals and families in our communities are among the most vulnerable to poor economic, educational and health outcomes. While it is common to believe these differences are based on individual effort, attitude or skills, the truth is barriers in our society—which become public policies and private practices over time—have disparate impacts.

To achieve our vision of all individuals and families reaching their human potential, we must understand and address the factors that impede progress based on race or ethnicity, to create more inclusive organizations and communities, and pursue more equitable outcomes.

Achieving United Way's mission means being an equity leader and striving for outcomes that reflect a more inclusive global society. As we articulate what the Modern United Way looks like, we must:

- Have a dual focus on operationalizing equity internally and in our community work;
- Include and prioritize the voices of those most affected;
- Ensure that decision making is transparent and involves staff and communities who are most affected;

- Be informed by history and data;
- Be creative and non-linear;
- Provide continuous training to refine knowledge, commitment, skills, practice and reflection;
- Acknowledge that successful outcomes will manifest in different forms, including better internal policies, stronger community results, and improved relationships and processes;
- Involve CEOs, board leadership and members, and our entire staff; and;
- Be about action as well as talk;

We are proud of United Ways, who are trailblazers in this work and remind us that we can always make a difference and be more equitable in engaging with community, diversifying our boards and staff, and improving vendor procurement. We highlight their work through the many case studies included in this document.

United Way Worldwide has intentionally focused inward as well as outward, and we encourage you to begin your diversity and inclusion journey in making impact equitable. As our network embraces an equity lens and understands its impact on our national and global work, we are here to support you in your efforts to lead in new ways.

Yours in equity and inclusion,

Brian Gallagher
President and Chief Executive Officer
United Way Worldwide

Suzanne McCormick
U.S. President
United Way Worldwide



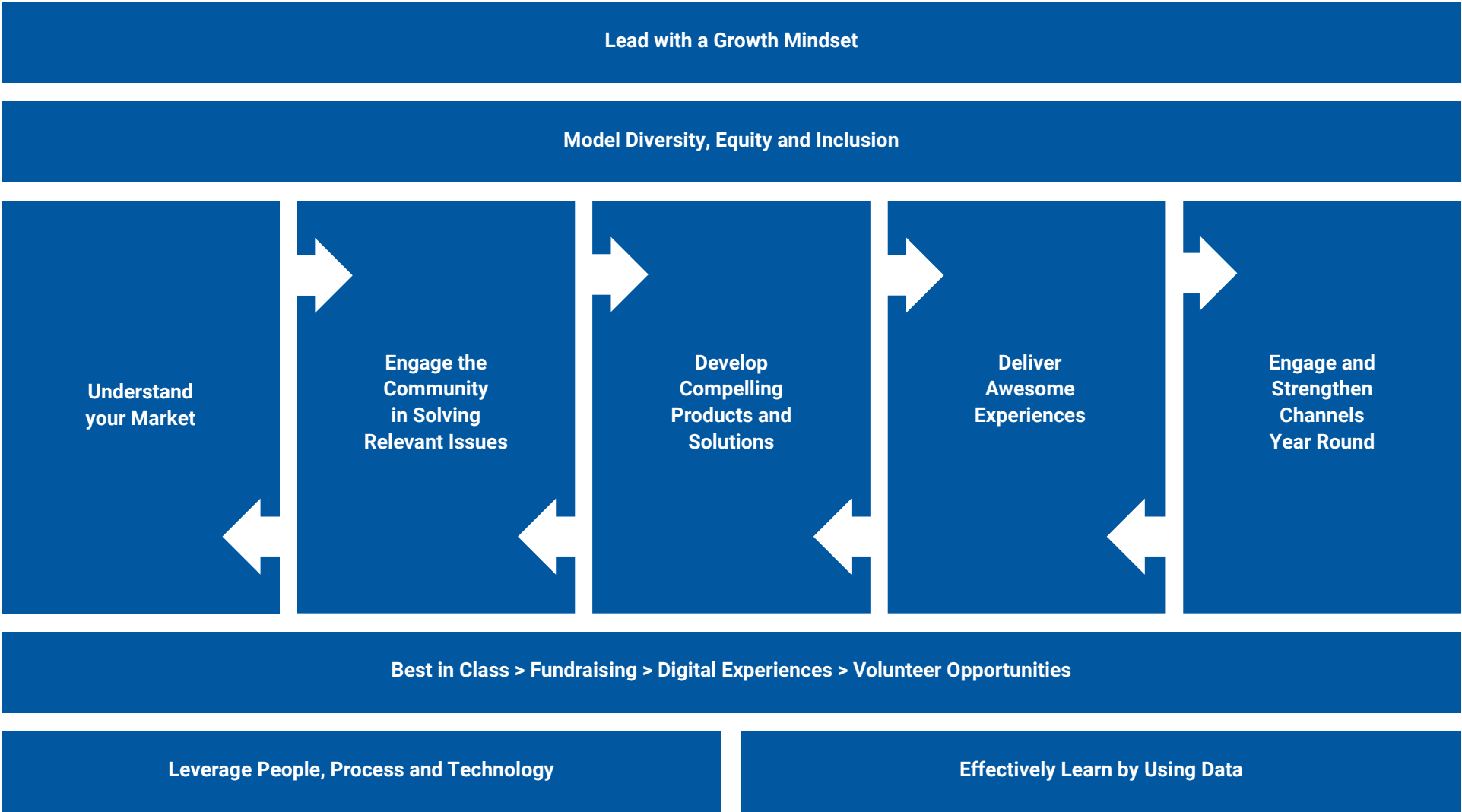
UNITED WAY EQUITY DEFINITION

Equity is the intentional inclusion of everyone in society. Equity is achieved when systemic, institutional, and historical barriers based on race, gender, sexual orientation, and other identities are dismantled and no longer predict socioeconomic, education and health outcomes.

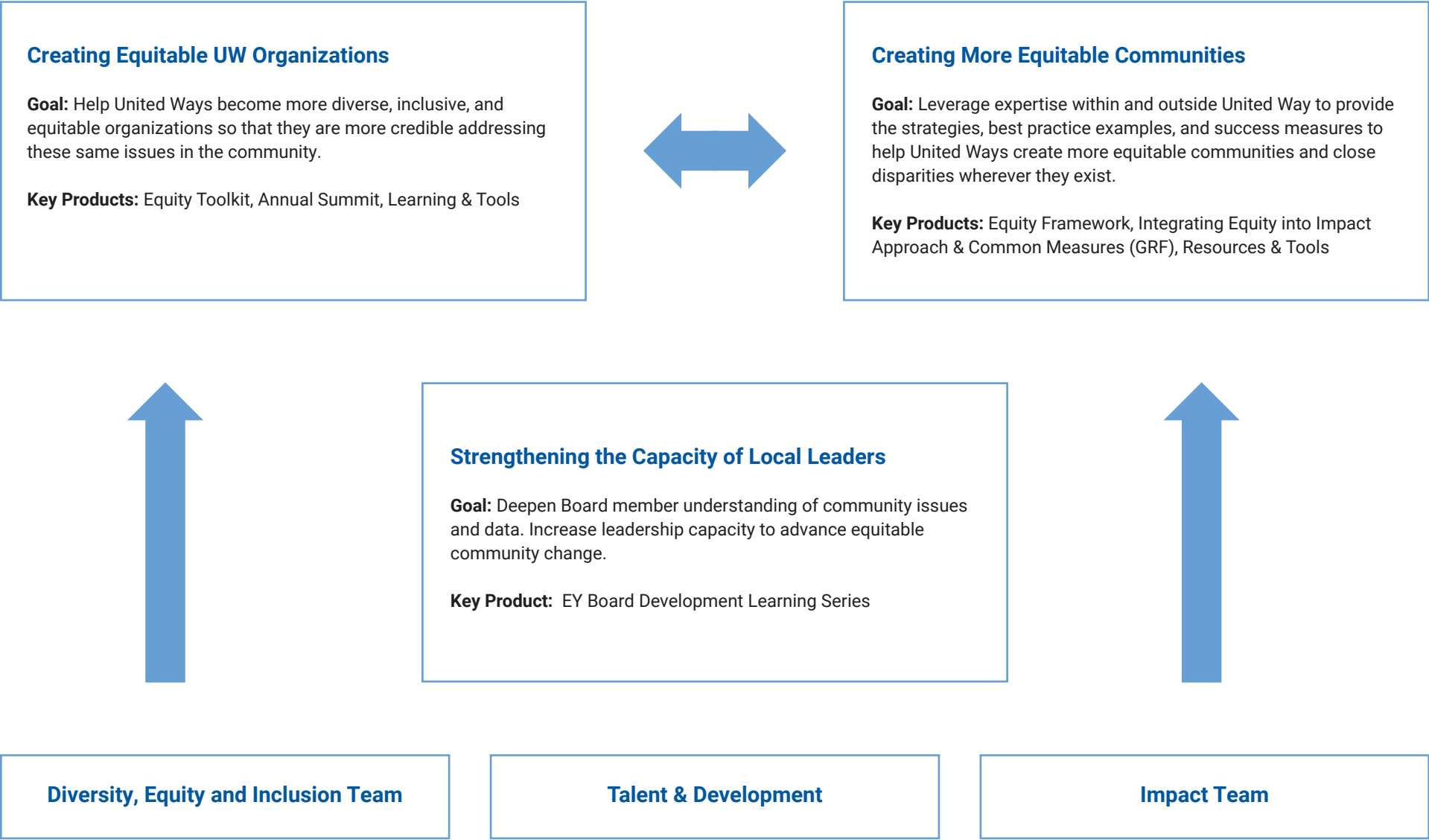
UNITED WAY VISION FOR EQUITY

We recognize structural racism and other forms of oppression have contributed to persistent disparities which United Way seeks to dismantle. Our United Way network strives to engage community members, especially those whose voices have traditionally been marginalized. We work with residents and public and private partners to co-create solutions that ensure everyone has the resources, supports, opportunities and networks they need to thrive. We commit to leveraging all of our assets (convening, strategic investments, awareness building, advocacy) to create more equitable communities.

BLUEPRINT OF A MODERN UNITED WAY



MODEL DIVERSITY, EQUITY AND INCLUSION



TOOLKIT OVERVIEW

This toolkit is designed to support you in being bold and effective on your race, equity and inclusion journey. It focuses on what you might consider “getting your own house in order”—building our understanding of the core issues; building our organizational capacity to focus on race, equity and inclusion; and creating supportive and thriving work places for our staff so that we can mirror an inclusive culture as we go out into the community.

Whether your United Way is small or large, with few or many staff, you’ll find guidelines, tools and stories here to support you on your journey.

There are two sections:

PRACTICE GUIDE

This section contains guidance about where and how to begin, or how to design your next steps if you have been on the journey for a while. Although this section is sequentially organized, feel free to move through it in a way that addresses the questions and issues you are working with at the moment.

WORKBOOK

This section contains tools, templates, worksheets and resources to support the actions in this practice guide. Refer to the workbook as you need tools or guidance to take specific steps.

Each section is divided into two parts:

PART ONE

Get Ready

You’ll find guidance here to carefully think through and prepare the design of your race, equity and inclusion efforts. The organizing framework for this section was provided by the Interaction Institute for Social Change.

1. Ground the Case for Change in Your Mission and Values.
2. Build Your Team and Map Out Your Process.
3. Bring Champions Together and Launch Your Process.
4. Prepare Yourself.
5. Build Shared Language and Analysis.

PART TWO

Practice Equity Daily

You’ll find guidance here to build the organizational capacity to support your race, equity and inclusion efforts. The organizing framework for this section is largely based on the work of Equity in the Center and their report, “Awake to Woke to Work: Building a Race Equity Culture.”

1. Build Equity-Minded Culture, Structures and Systems.
2. Nurture a Diverse, Equity-Minded Workforce.
3. Nurture a Diverse, Equity-Minded Board.
4. Tell Stories that are Centered on People and Systems.
5. Design Programs and Policies that are Targeted and Universal.

Please dive in. Get ready and practice equity daily! The UWW Diversity, Equity and Inclusion and Community Impact Teams are also available to support your thinking and practice. If you’re reading this toolkit in hardcopy, you can request a PDF version from the UWW Diversity, Equity and Inclusion Team. That will enable you to use the many links that are embedded throughout the document.



Practice Guide

PART ONE: GET READY	9
1. Ground the Case for Change in your Mission and Values	10
Case Study: Santa Cruz	11
2. Build your Team and Map out your Process	12
Case Study: Southeast Louisiana	16
3. Bring Champions Together and Launch your Process	17
Case Study: Dallas	19
4. Prepare Yourself	20
5. Build Shared Language and Analysis	21
Case Study: Ann Arbor	23



Workbook

PART ONE: GET READY	44
1. Ground the Case for Change in your Mission and Values	
Tool: Making the Case for Change Worksheet	45
Tool: Color-blind to Equity-focused: An Initial Organizational Assessment	51
Tool: Talking About Race Toolkit: Affirm, Counter, Transform	53
Tool: Four Building Blocks of Change	57
Tools for a Deeper Dive	58
2. Build your Team and Map out your Process	
Tool: Sample Team Structure	60
Tool: Sample Race, Equity and Inclusion Strategy Team Charter	61
Tool: Sample Meeting Topics to Map Out Your Process	63
Tool: Team Development Cycle	67
Tool: Stakeholder Analysis and Engagement Worksheet	68
Tool: Designing Your Pathway to Action Worksheet	70
Tools for a Deeper Dive	71
3. Bring Champions Together and Launch your Process	
Tool: Preparing Senior Leaders to Champion the Effort	79
Tool: Designing Effective Meetings – Setting Up, Sample Agenda and Suggested Meeting Norms	80
Tools for a Deeper Dive	86
4. Prepare Yourself to Facilitate	
Tool: Preparing to Serve	87
Tool: Preparing for the Process of Conversations	88
Tool: Preparing for the Content of the Conversation	90
Tool: Rules of the Road for Change Agents	94
Tools for a Deeper Dive	95
5. Build Shared Language and Analysis	
Tool: Working Glossary of Core Concepts	96
Tools for a Deeper Dive	98

PART TWO: PRACTICE EQUITY DAILY	24
1. Build Equity-Minded Culture, Structures and Systems	26
Case Study: Racine County	28
2. Nurture a Diverse, Equity-Minded Workforce	29
Case Study: Battle Creek and Kalamazoo Region	32
United Way of Greater St. Louis	33
3. Nurture a Diverse, Equity-Minded Board	34
Case Study: Jackson County, Oregon	36
4. Tell Stories Centered on People and Systems	37
Case Study: Central Carolina/Charlotte, North Carolina	39
Case Study: Baltimore, Maryland	40
5. Design Programs & Policies that are Targeted & Universal	41

PART TWO: PRACTICE EQUITY DAILY	99
1. Build Equity-Minded Culture, Structures and Systems	
Tool: Race Equity Culture Assessment	100
Tool: Use Equity Primes and Protocols to reduce Bias	101
Tool: Indicators of Successfully Engaging Senior Leadership	104
Tool: Indicators of Successfully Engaging Management	106
Tool: Indicators of Successfully Engaging the Community	108
Tool: Indicators of Successfully Building the Learning Environment	110
Tool: Indicators of Successfully Shifting Organizational Culture	112
Tool: Shifting Organizational Structure and Operations	114
Tool: Indicators of Successfully Gathering and Using Data	115
Tools for a Deeper Dive	117
2. Nurture a Diverse, Equity-Minded Workforce	
Tool: Sample Staff Core Competencies	118
Tool: HR Policies Audit Checklist	121
Tools for a Deeper Dive	135
3. Nurture a Diverse, Equity-Minded Board	
Tool: Cultivating Equity-Minded Board Members	137
Tool: Board Composition Matrix	140
Tool: Board Composition Matrix–Group Discussion Worksheet	141
Tools for a Deeper Dive	158
4. Tell Stories Centered on People and Systems	
Tool: Storytelling for Social Justice	159
Tool: A Style Guide: Toward Harnessing Language in Support of Intersectionality and Cross-Sector Power Building	162
Tools for a Deeper Dive	165
5. Design Programs & Policies that are Targeted & Universal	
Tool: Introductory Questions for Program Design and Evaluation	166
Tool: Systems Analysis Guide	167
Tool: A Guide to Developing Racially Equitable Solutions	168
Tool: Applying Targeted Universalism	169
Tool: Racial Equity Impact Assessment	170
Tools for a Deeper Dive	171
Acknowledgements	173



Part One: Get Ready > 1. Ground the case for change in your mission and values.

COLOR-BLIND TO EQUITY-FOCUSED: AN INITIAL ORGANIZATIONAL ASSESSMENT¹⁷

This is an assessment you can make in just a few minutes to get an initial sense of where your United Way is on a spectrum from being color-blind to being equity-focused. You can also use this assessment with your team to build a clearer collective snapshot of where your organization is on its learning journey. Once you have an interpretation of your results, you can select tools in this toolkit to support your next steps.

This is an assessment you can make in just a few minutes to get an initial sense of where your United Way is on a spectrum from being color-blind to being equity-focused. You can also use this assessment with your team to build a clearer collective snapshot of where your organization is on its learning journey. Once you have an interpretation of your results, you can select tools in this toolkit to support your next steps.

Section A

My organization

- ☐ Understands and communicates that reducing racial inequities is mission-critical.
- ☐ Collects, breaks out, and analyzes data by race/ethnicity in programs and operations.
- ☐ Proposes strategies that have been processed through a racial impact analysis.
- ☐ Values diversity and inquires about the cultural competence of staff to work with diverse groups.
- ☐ Has mechanisms for management accountability around racial equity, diversity and inclusion.
- ☐ Has mechanisms for staff accountability around racial equity, diversity and inclusion.
- ☐ Supports the efforts of internal groups to work on issues of equity, diversity and inclusion.

In Section A, I checked _____ boxes

Section B

My organization

- ☐ Has some recognition that expanding opportunity and closing racial gaps are important to its work.
- ☐ Collects and breaks out data by race/ethnicity in programming but is not sure what to do with it.
- ☐ Has gone through trainings about race but is unclear about what to do next.
- ☐ Needs a better understanding of the distinctions between equity and diversity/inclusion.
- ☐ Has no mechanisms for management accountability around equity, diversity and inclusion.
- ☐ Has no mechanisms for staff accountability around equity, diversity and inclusion.
- ☐ Has an internal group working on issues of equity, diversity and inclusion.

In Section B, I checked _____ boxes

Section C

My organization

- ☐ Does not collect, break out, or analyze data by race/ethnicity in programming.
- ☐ Proposes strategies that are presumed to work for all children.
- ☐ Looks for staff, consultants, and vendors with racial/ethnic backgrounds similar to the community.
- ☐ Sees diversity as an important organizational consideration.
- ☐ Has accountability mechanisms around diversity and inclusion, but not around equity.
- ☐ Offers cultural competence training and opportunities for cross-cultural conversations and learning.
- ☐ Supports the efforts of internal groups to work on issues of diversity and inclusion.

In Section C, I checked _____ boxes

Section D

My organization

- ☐ Does not collect, break out, or analyze data by race/ethnicity in programs or operations.
- ☐ Proposes strategies that are presumed to work for everyone.
- ☐ Presumes that all staff can work with all groups.
- ☐ Does not see diversity as an important organizational consideration.
- ☐ Believes that lifting up issues of race/ethnicity will only create conflict.
- ☐ Has no accountability mechanisms around equity, diversity and inclusion.
- ☐ Discourages the formation of internal groups to focus on race/ethnicity.

In Section D, I checked _____ boxes

¹⁷Source: This assessment was developed by the Race Matters Institute/Just Partners, building on the Annie E. Casey Foundation's "Advancing the Mission Toolkit." Race Matters Institute, accessed May 6, 2019, <http://racemattersinstitute.org/>. Reprinted with permission.



Part One: Get Ready > 1. Ground the case for change in your mission and values.

COLOR-BLIND TO EQUITY-FOCUSED: AN INITIAL ORGANIZATIONAL ASSESSMENT, CONT.¹⁷



Interpreting your results

Underneath the section where you have the most checks, see how your organization may be characterized.

If the most checks are in **Section D**, your organization may be characterized as “**Color-blind.**”

An intentional focus on race is likely to improve your organizational results.

If the most checks are in **Section C**, your organization may be characterized as “**Diversity-only.**”

Congratulations on your work on diversity. Move next to a focus on equity.

If the most checks are in **Section B**, your organization may be characterized as “**Race-tentative.**”

You’ve made a start, so accelerate your work.

If the most checks are in **Section A**, your organization may be characterized as “**Equity-focused.**”

We also hope you’ll share your lessons and best practices with others. Be sure to put policies in place that can sustain the work.

¹⁷Source: This assessment was developed by the Race Matters Institute/Just Partners, building on the Annie E. Casey Foundation’s “Advancing the Mission Toolkit.” Race Matters Institute, accessed May 6, 2019, <http://racemattersinstitute.org/>. Reprinted with permission.