

MODULE 8: CREATING THE FRAMEWORK FOR AN INCLUSIVENESS BLUEPRINT

Step One: Creating Your
Inclusiveness
Committee

Step Two: Training and
Consultants

Step Three: Definitions and
Case Statement

Step Four: Gathering and
Analyzing
Information

Step Five: Creating Your
Inclusiveness
Blueprint

Step Six: Implementation



MODULE 8: CREATING THE FRAMEWORK FOR AN INCLUSIVENESS BLUEPRINT

Overview of Content

This module represents a turning point in your inclusiveness initiative. By the time you complete this module, the groundwork will be laid for making changes that will expand your organization's inclusiveness. If you've followed the steps in the previous modules, you should be well prepared to complete this module.

In this module you will learn about and create the framework for your organization's inclusiveness blueprint. In addition, you will:

- Prioritize two to four categories that you will focus on for your inclusiveness blueprint.
- Preview the work that is ahead of you in *Modules 9-16*.
- Review your progress to date and check in on your how your internal process is working.
- Celebrate the accomplishments that you have already made toward becoming a more inclusive organization.

Who to Involve

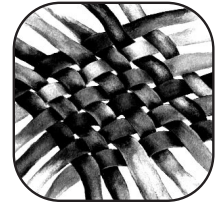
The work in this module should be completed by all of the members of the Inclusiveness Committee.

Exercises to Complete

- *Exercise 8-A: Creating a Framework for Your Inclusiveness Blueprint*
- *Exercise 8-B: Reviewing Our Process*
- *End-of-Module Checklist*

Step Five: Creating Your
Inclusiveness
Blueprint

MODULE 8: CREATING THE FRAMEWORK FOR AN INCLUSIVENESS BLUEPRINT



What Is an Inclusiveness Blueprint?

An inclusiveness blueprint is a plan that outlines your priorities and action steps for becoming more inclusive. It is similar to a detailed strategic plan and includes goals, objectives, tasks, timelines, and individuals responsible for accomplishing each task. The blueprint is grounded in data: the priorities your organization identified in the blueprint will be developed based on the information you collected during the information-gathering phase. The wisdom your organization has had up to this time will be expanded by facts, figures, and perceptions of stakeholders.

A successful blueprint yields many benefits. A good blueprint can:

- Create internal agreement and clarity about the priorities of your organization in relation to inclusiveness.
- Ensure that everyone in your organization understands how specific action items correspond to particular goals and outcomes that you hope to achieve.
- Lead to more successful teamwork based on common understanding.
- Foster better communication about inclusiveness issues between board and staff.
- Ensure that your organization designates appropriate resources (time, money, energy) to achieve a specific goal.
- Connect action items to **achievable milestones** with which you will be able to monitor achievements and assess results.

The following is the general format for your inclusiveness blueprint:

- *Introduction:* Why you decided to do an inclusiveness initiative, the process you have engaged in, the major goals you hope to accomplish as you work through your inclusiveness blueprint, and similar matters.
- *Key findings from the information-gathering process:* A summary of the results of your research on available facts and stakeholder perspectives.
- *A plan for each prioritized category:*
 - Mission and Organizational Values
 - Board of Directors
 - Personnel
 - Organizational Culture



- Volunteers and Helpers
- Programs and Constituents
- Marketing and Community Relations
- Fundraising and Membership

Depending on your priorities, you will include some or all of the following information in the plan for one or more of the categories above:

- Information-gathering results (strengths as well as weaknesses)
- Problem statement
- Goal(s)
- Outcomes
- Objectives
- Tasks
- Responsible party
- Timeline
- Budget

Definitions

Goals: Statements that define what your organization is trying to accomplish in relation to its inclusiveness practices. Example: _____ (organization) will improve both the quantity and quality of services to individuals of color within our service area.

Outcomes: Specific, measurable results you hope to achieve to become more inclusive. Example: The rate of individuals of color accessing our services will increase by 10 percent.

Objectives: Precise, measurable (or at least verifiable), time-phased activities that support the achievement of a goal. Example: In six months, we will have placed advertisements about our program in local media for communities of color.

Tasks: Specific actions required to complete an objective. Example: Create advertising copy in Spanish.¹

Please note that every organization tends to have its own way of talking about goals and objectives and its own planning process. The format for the blueprint should be adapted to suit your organization. It will be stronger and more useful if it is aligned with good existing planning mechanisms. For example, you may want to follow the format you use for creating a strategic plan and/or an annual plan.

Modules 9-16 are designed to help you articulate the goals, outcomes, and objectives for your organization, in relationship to a specific area/category of activity (Volunteers, Fundraising, etc.). They all have a similar format.



By the end of *Module 16*, you will have considered all areas of your organization's work, thereby making your blueprint complete. If you choose not to look at all possible categories, skip modules that relate to categories you are not reviewing. For example, if you choose not to collect information on Fundraising, then you will skip *Module 16*.

For a sample of a portion of an inclusiveness blueprint, turn to the Appendix.

“Our every action has a universal dimension, a potential impact on others' happiness.”

How Long Should the Inclusiveness Blueprint Last an Organization?

The inclusiveness blueprint will likely cover a two to four year span. That is to say, the time that it takes for an organization to begin implementation of the blueprint until the time that the desired outcomes are achieved should be between two and four years. However, this time period can vary significantly depending on the organization. Some organizations may decide to use the same basic framework for the blueprint for five or more years but actively work to update it every 12 months. Others may decide that it will only take 18 months to complete the initial outcomes and then start from scratch at the end of 18 months with a new blueprint. Each organization must decide for itself the duration that will best suit its needs.

*-His Holiness the 14th
Dalai Lama*

Creating the Blueprint

As you complete *Modules 9-16*, you will have the opportunity to answer the following questions as they relate to each category you prioritize (i.e., Mission and Organizational Values, Board of Directors, Personnel):

1. From Available Facts (Refer to exercises completed in *Module 5*.)

- In what ways is your organization **more inclusive than your community?**
- In what ways is your organization **more inclusive than your field?**
- In what ways is your organization **less inclusive than your community?**
- In what ways is your organization **less inclusive than your field?**
- Are there any **best practices** from the field that might be applicable to this particular category?
- What **trends** can you identify regarding your organization's inclusiveness practices based on the available facts?



- Is there any **additional information** not currently available that would be helpful to collect as a part of the inclusiveness process in the future?
- Is there **anything else** that you noticed regarding the available facts?

2. From Stakeholder Perspectives (Refer to exercises completed in *Module 6.*)

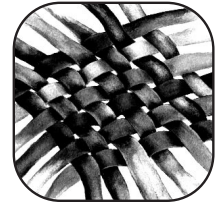
- What significant **themes** did a majority of your stakeholders identify?
- What stories or **strongly held beliefs** regarding your organization's inclusiveness practices were identified by stakeholders?
- Are there any significant **inconsistencies** in perspectives among groups of stakeholders?
- What **trends** can you identify regarding your organization's inclusiveness practices based on the perspectives of your stakeholders?
- Is there **anything** else that you noticed regarding the stakeholder perspectives in this category?

3. Action Plan: Goals and Objectives (To be addressed in *Modules 9-16.*)

- What is/are the primary problem(s) you want to address?
- What is/are your desired goal(s)?
- What is/are your desired outcome(s)?
- What are the primary objectives you hope to accomplish?
- What tasks will you complete to achieve the objectives?
- Who will be responsible for completing the tasks?
- When will the objectives and tasks be completed?
- What resources, financial and otherwise, are necessary for achieving your goals?

The above are the core components of an inclusiveness blueprint. Your blueprint will also include an accountability plan that will detail how your organization will ensure that goals and objectives are met. The accountability plan will be covered in more detail in *Module 18.*

Preliminary Analysis of the Data and Prioritization of Categories



It is now time to decide the categories that you will prioritize for your inclusiveness blueprint. Most organizations will choose two to four areas on which to focus their work. For example, an organization may choose to improve its organizational culture so that it is more welcoming of communities of color, to create a more inclusive board of directors, and to find ways to improve their ability to serve communities of color effectively.

Exercise 8-A: Prioritizing Categories will help you determine the general categories on which to focus your work. Depending on which categories you prioritize, you will only complete the modules in the blueprint that correspond with the chosen categories. For example, if an organization were to select the three areas noted above, it would complete the following modules: *Module 10: Boards of Directors*; *Module 12: Organizational Culture*; and *Module 14: Programs and Constituents*.

There are a few important points to keep in mind as you determine which categories to prioritize.

- *Do what's realistic.* Most organizations cannot sustain more than a few major changes at a time.
- *Try to do some internal work and some external work.* For example, work on improving inclusiveness among the staff and your organizational culture and try to improve your community relations strategies.
- *Have patience.* In some ways, the process of doing the work is more important than the actual outcomes. As you actively seek to improve your work in one area of the organization, there will be reverberations throughout the organization (most will hopefully be positive!). If you're anxious to get a lot done immediately, try to resist the temptation and remember that change will come in time.
- *Place a higher priority on areas for which there is a lot of energy and enthusiasm.* For example, if your board of directors is deeply focused on other work (e.g., raising money for a capital campaign) right now and is less interested in inclusiveness work at this time than the staff, it may be best not to prioritize working with the board of directors for the time being. (This is not a reason to deemphasize the work of the board permanently.)
- *Play to your strengths as well as your challenges.* For example, the process of gathering information might uncover that ethnic media outlets have positive perceptions of your organization but communities of color in general don't seem to know a lot about what you do. If this is the case, then, you may want to focus on community relations to take advantage of the positive perceptions of ethnic media outlets to promote your messages in communities of color.



Choosing which categories to prioritize for your inclusiveness blueprint should be relatively easy now that you have completed *Modules 5, 6, and 7* about information gathering. Follow the steps in *Exercise 8-A: Prioritizing Categories* to determine the categories that make the most sense for you to focus your efforts on during the remainder of the inclusiveness blueprint.

Complete *Exercise 8-A: Prioritizing Categories.*

Now it's time to decide which components to include in your organization's inclusiveness blueprint. Remember, just like a strategic plan, an inclusiveness blueprint is a dynamic document that will change as circumstances require. The basic framework for your blueprint and its contents can and should change over time as you learn more about your organization in relation to inclusiveness work.

Complete *Exercise 8-B: Creating a Framework for Your Inclusiveness Blueprint.*

Note for Organizations Interested in Addressing Other Diverse Communities

- As you develop the inclusiveness blueprint, consider returning to the original discussions you had in *Module 4: Making the Case for Inclusiveness (Exercise 4-A: Defining Inclusiveness and Diversity for Your Organization)*. Within your inclusiveness blueprint, it is a good idea to clearly state why your organization chose to focus on the communities and/or characteristics it did, and when appropriate, to provide definitions.
- In addition, you may want to address any methodological challenges that limited your ability to collect information on particular groups. For example, if you hoped to get information on lesbian, gay, bisexual, and/or transgender individuals and were unable to find relevant data during the information-gathering phase, you may wish to include that information in the overview of definitions and/or in the overview of key findings.

Check in on Your Process and Celebrate Your Progress!

Before continuing with the next module, take some time to reflect on the process thus far. Ask yourselves whether your process is working effectively, whether you still have the right people involved in the process, and whether you need to make any process-related course corrections before you begin.

Complete Exercise 8-B: Reviewing Your Process.



Also, be sure that you have informed your stakeholders of the tremendous progress you have made. To do this, go back to *Module 1 (Exercise 1-B: Communicating With Your Stakeholders)* and make sure that you continue to provide people with information and opportunities to offer feedback.

In addition, revisit your organization's definition of inclusiveness and make sure that it is still relevant. Have you learned anything already that might change your original definition of inclusiveness? If so, take the time now to edit the original definition and then make certain that you have made your stakeholders aware of any changes.

Most importantly, think about appropriate ways for your organization to celebrate your accomplishments that might take into consideration your new awareness of issues of inclusiveness. And as always, recognize the people who have provided leadership and support to this initiative and thank them for their commitment to creating a more inclusive organization.

Track your progress in completing Module 8 on the *End-of-Module Checklist*, located after the exercises.

¹ Allison, Michael, Jude Kaye, and the Support Center for Nonprofit Management, *Introduction to Strategic Planning*, a Wiley Publication, 1997.

Module 8: Creating the Framework for an Inclusiveness Blueprint

CHC sets priorities for its inclusiveness blueprint.

Trevor and Eleanor presented their compilations of the information-gathering process to the Inclusiveness Committee. The committee members found the information fascinating and asked lots of questions.

“So the staff feels that we could be doing more, especially with our volunteers and fundraising, but the Board generally believes we’re right where we should be,” said Eleanor. “There are two other Board members, besides Beth and Jeff, who see the need for change. The other six members think things are going along fine and feel uncomfortable with doing anything that would rock the boat. Among those six, though, I would say four are open to learning more...if we can convince them it would make the organization better.”

“Where does Mrs. Dreyfuss fall in that assessment?” asked Jeff.

“She’s not one of the members who see the need for change, but she’s open to discussing this further. She definitely wants to keep Joe happy, so that’s an important leverage point,” said Eleanor, smiling at her boss. “She was surprised when I told her that other clinics in communities like ours have diversified their Boards. She said that she doesn’t have anything against doing it, she just doesn’t want to compromise the Board’s ability to raise money.”

“Oh, that just gets me,” said Marcie. “Why would she assume that diversity would erode fundraising?”

“I know,” said Eleanor. “But we need to meet people where they are, and help them learn about all of the contributions that people of color can make to our work. I keep thinking about how the light bulb went on for me about this issue, and I hope that we can help make it go on for these Board members.”

Jeff cleared his throat. “Well, since I’m the head of the nominating committee, I think we can make some changes - eventually.”

“I agree, Jeff,” said Joe. “There is a potential for making progress here. Especially since it sounds like this is a category where there is a definite discrepancy between the practices in our field and our organization, and also between the perceptions of different Board members.”

“Another place where we see that kind of discrepancy is in fundraising,” says Eleanor. She and Trevor explained their findings about the disparity the ethnicity of donors participating in events versus those who contributed to the donation boxes in the clinic. They also noted that the staff response on survey questions about fundraising revealed a strong base of ideas for making changes. Several staff members had suggested other types of events and activities that could draw in new donors.

“This sounds like another slam dunk,” said Hector. “We have two areas to prioritize.”

“What about personnel?” said Joe. “My sense is that this is an area where my predecessor had already done a lot of work. What did the findings show?”

“In comparison with other clinics, we’re more diverse in terms of staff, especially at the management level,” said Trevor. “And on the survey, the vast majority of staff reported that they believe we have a commitment to inclusiveness and that we have an open and welcoming workplace.”

“That’s not the same with our volunteers, though,” said Luisa. “At least from what I read about the focus groups.”

“You’re right, Luisa,” said Eleanor. “The focus group of patient families revealed some dissatisfaction with our volunteers. The families don’t feel entirely comfortable with the people we have volunteering at the welcome desk. And patients for whom English is not their first language vastly prefer to have a clinician who speaks their language.”

Trevor reported on the quantitative side. “Forty-nine percent of clinic volunteers responded that they have challenges creating a welcoming environment and 80 percent wanted additional training in working with diverse clients.”

Joe asked, “Luisa, Marcie, do you think we could make some progress here, or would it be too great of a challenge?”

“I have so many ideas, Joe, I can’t even tell you!” Luisa smiled. “It would be great to have some resources - time-wise, and the help of the staff - to make some improvements.”

Marcie nodded in agreement. “We’re ready to make the changes. It was really helpful to do the research and find out where our challenges are. But I’m still worried about the organizational culture

side of things. Though you talked about the happy side of the staff survey, I see that some staff made comments about the differential in treatment between administrative and professional staff.”

“I noticed that, too,” said Hector. “But no one makes any concrete suggestions for how to improve it.”

“No, but why should they? It should be our job as the managers to make the changes,” said Marcie.

“You’re right, of course. But the balance of the staff survey was so positive, I think we could probably deal with this concern at the management team level, just by changing some of our practices,” said Joe. “How about if we start with the three priority areas of Board, fundraising, and volunteers. I think this would give us an effective beginning to our inclusiveness work.”

“I agree,” said Melody. “As an admin person, I can say that the problems aren’t so big. Mainly, people want to see if we’re going to really make progress on the initiative.”

“Okay, okay,” said Marcie. “It’s just hard not to want to do everything at once!”

“I know,” Joe replied. “But we have to be patient with ourselves and this process. It takes time to change an organization. So, I’ll report to the staff and Board on what we’ve decided. We need someone to take responsibility for each area. This would involve leading the staff through the workbook module on developing an action plan for your area and helping with the implementation. I’ll take on the Board.”

Marcie and Luisa agreed to work together on the volunteer plan, and Eleanor took responsibility for fundraising.

Joe smiled. “Excellent, now...does anyone have feedback on our process so far? Is the committee structure still working for everyone? Do we need to add any members?”

People gave general assent to the committee and said that they felt the process had been working well.

Beth raised her hand. “Joe, I’d like to ask Mrs. Dreyfuss to join us for the Board and fundraising discussions. I think it’s important that we include her now.”

“What does everyone think?” Joe asked. There were nods around the table. “Sounds fine,” said Hector.

“Okay, folks, if you have further thoughts or concerns, let me know,” said Joe. “Now it’s time to put some action plans together! Let’s meet again in two weeks to talk about our progress.”

Note: Please see continuation of the story of Children’s Health Center in Modules 10, 13, and 16, in alignment with the selected focus areas.

EXERCISE 8-A

Prioritizing Categories for Your Inclusiveness Blueprint

In this exercise you will select your organization's top two to four priorities among the following categories:

- Mission and Organizational Values
- Board of Directors
- Personnel
- Organizational Culture
- Volunteers and Helpers
- Programs and Constituents
- Marketing and Community Relations
- Fundraising and Membership

To determine the highest priorities for your organization, review the findings from the following exercises in *Module 7: Information Gathering Part 3, Compiling Results*:

- *Exercise 7-B: Available Facts: Making Numerical Comparisons*
- *Exercise 7-C: Available Facts: Compiling Other Information*
- *Exercise 7-G: Stakeholder Perspectives Compiling Likert Scale Responses (Quantitative)*
- *Exercise 7-H: Stakeholder Perspectives Compiling Narrative Responses (Qualitative)*
- *Exercise 7-I: Stakeholder Perspectives Compiling Focus Group Responses.*

Answer the following questions using a broad-brush stroke. Identify themes, *not* detailed findings. (Analysis of detailed findings will occur in *Modules 9-16*.) In which categories

- do you find significant discrepancies between the community, the field, and your organization?
- do you find significant discrepancies between the perspectives of one group and another group (e.g., between Native American respondents and white respondents)?
- do significant problems appear to be concentrated?
- do respondents clearly articulate significant problems *and* provide realistic solutions to problems?
- do you find that internal stakeholders have the most interest in working?

continued

EXERCISE 8-A: Prioritizing Categories for Your Inclusiveness Blueprint *continued*

Write down the categories that show up multiple times in the answers to the questions listed above.

Sample: Programs and Constituents

Using the example below as a model, discuss and record the different themes/issues that you uncovered.

Sample Category: Programs and Constituents.

Sample Issues for Programs and Constituents:

- *Our community is 10 percent Asian American and Asian Americans are the fastest growing racial/ethnic group, yet fewer than 2 percent of our constituents are Asian American.*
- *African American and Latino community members are generally knowledgeable about our work but Asian Americans generally are not.*
- *Many Latino clients have had negative experiences with our organization, particularly monolingual Spanish speakers.*
- *Latino board members do not feel that the program staff has awareness of the needs of diverse Latino communities (note: this could also come up in the “Personnel” category).*

continued

EXERCISE 8-A: Prioritizing Categories for Your Inclusiveness Blueprint *continued*

Category: _____

Issues:

Category: _____

Issues:

Category: _____

Issues:

Category: _____

Issues:

continued

EXERCISE 8-A: Prioritizing Categories for Your Inclusiveness Blueprint *continued*

Category: _____

Issues:

After completing the exercise above, discuss the findings and narrow the list of categories to two to four. As you think about which elements to prioritize, remember the guidelines that were discussed earlier in this module:

- Do what's realistic — most organizations cannot sustain more than a few major changes at a time.
- Try to do some internal work and some external work.
- Have patience.
- Prioritize things for which there is a lot of energy and enthusiasm.
- Play to your strengths as well as your challenges.

Record your final decision regarding the two to four categories that your organization will focus on in your inclusiveness blueprint:

EXERCISE 8-B

Creating a Framework for Your Inclusiveness Blueprint

A typical blueprint will include some or all of the following elements.

I. Introduction to Your Inclusiveness Initiative

- Purpose.
- Definition of inclusiveness (from *Exercise 4-A: Defining Inclusiveness and Diversity for Your Organization*).
- Case statement on inclusiveness for your organization (from *Exercise 4-E: Writing Your Case Statement*).
- Process used to create the inclusiveness blueprint.

II. Methodology

- Overview of Methods Used to Gather Information (from *Exercises 5-F: Community Information-Gathering Work Plan, 5-G: Field Information-Gathering Work Plan, and 5-H: Organizational Information-Gathering Work Plan*).

III. Key Findings from Information Gathered Pertaining to the Organization as a Whole

IV. Key Findings from Information Gathered in Each Prioritized Category and a Plan for Each Prioritized Category (Include only categories that your organization selected in *Exercise 8A: Prioritizing Categories*.)

- Mission and Organizational Values
 - Available facts
 - Stakeholder perspectives
 - Action plan
- Board of Directors
 - Available facts
 - Stakeholder perspectives
 - Action plan

continued

EXERCISE 8-B: Creating a Framework for Your Inclusiveness Blueprint *continued*

- Personnel
 - Available facts
 - Stakeholder perspectives
 - Action plan

- Organizational Culture
 - Available facts
 - Stakeholder perspectives
 - Action plan

- Volunteers and Helpers
 - Available facts
 - Stakeholder perspectives
 - Action plan

- Programs
 - Available facts
 - Stakeholder perspectives
 - Action plan

- Clients/Constituents/Customers/Beneficiaries
 - Available facts
 - Stakeholder perspectives
 - Action plan

- Marketing and Community Relations
 - Available facts
 - Stakeholder perspectives
 - Action plan

- Fundraising and Membership
 - Available facts
 - Stakeholder perspectives
 - Action plan

continued

EXERCISE 8-B: Creating a Framework for Your Inclusiveness Blueprint *continued*

V. Accountability Plan

VI. Conclusion

For sample inclusiveness blueprint sections, refer to the Appendix.

Instructions:

Based on the model above, create an outline for your organization's inclusiveness blueprint.

Date Exercise Completed _____

EXERCISE 8-C

Reviewing Our Process

Is our process working effectively?

If not, what do we need to do differently?

Do we have the right people involved in the inclusiveness initiative?

If not, who are we missing and how do we get them involved?

Date Exercise Completed _____

END-OF-MODULE CHECKLIST

Module 8

<i>Action Item</i>	<i>Date Completed</i>	<i>Notes</i>
Review what to include in an inclusiveness blueprint.		
Create a framework for your inclusiveness blueprint.		
Check in on process; make changes as needed.		
Recognize your progress to date and communicate it to appropriate stakeholders.		

