

Leading By Example Network Progress in “Getting Started” Assessment Tool

The purpose of this checklist is to help LBE Network members take stock of their team’s progress in launching their diversity, inclusion, and equity change process. Coinciding with the phases of organizational change work suggested by CA Tomorrow for the LBE project, the tool is divided into major areas that will allow LBE leaders to do a quick assessment of their progress in achieving the objectives of: their initial project objectives set at the onset of this effort—in regards to goals they set for their team work, the 1st Cycle of Inquiry, and the organizational engagement strategies chosen to engage other CF stakeholder groups in the LBE work. In addition, the tool is designed to help LBE leader’s build on the preliminary project outcomes as they consider the future directions of the LBE work.

Per design of the LBE project, we know that each foundation's experience and timeline will be different. Never the less, this tool should help each team member highlight major accomplishments, consider how steps in the process that might be strengthened, and identify areas that may require greater attention. Ultimately, we hope the tool helps each community foundation team get a stronger appreciation for the work they have accomplished, a clearer sense of the work that still needs to be done, and provides some food for thought about the approaches they might choose to use in the near and long-term LBE work.

(Note: Leadership Team=3 CF Leaders that initiated this effort; Expanded Work Group=Any planning group or steering committee each leadership team has assembled to shepherd the LBE work through their respective foundations)

Original LBE Project Objectives	Yes. Headed in the right direction.	Not sure, or could do better.	No. Need to clarify or refocus.	Comments or Notes (Related to strategy, time line, or resources)
Our leadership team has reached agreement on, and is actively facilitating, an organization-wide change process around diversity, inclusion, & equity within our foundation				
Our leadership team continues to meet or communicate as a group to check our progress.				
Our leadership team has identified and briefed other senior-level foundation leaders and stakeholders about the in the LBE project and work.				
Our leadership team has engaged an expanded work group of CF leaders—senior staff, mid-level staff, and trustees in the LBE effort.				
This expanded work group meets regularly and is working to ensure the LBE organizational change effort; the foundation’s trustees and executive management have ensured the group has the time and resources needed to meet our objectives.				

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1st CYCLE OF INQUIRY: (Data collection & analysis about the internal and external diversity, inclusion, and equity issues that are most impacting our foundation and community)	Yes. Headed in the right direction.	Not sure, or could do better.	No. Need to clarify or refocus.	Comments or Notes (Related to strategy, time line, or resources)
We have use CA Tomorrow's Data Collection Resource Guide to help us develop a baseline picture of our current foundation practices regarding diversity, inclusion, and equity.				
Our leadership team and our expanded work group have analyzed the collected data and have agreed on a baseline picture of our foundation's current strengths and assets, as well as the gaps and weaknesses (in terms of key organizational areas identified in CA Tomorrow's Diversity & Equity Scan & SWOT Analysis Tool).				
Our leadership team and the expanded work group have also gathered and analyzed data (existing and new) related to community or regional trends and issues that present opportunities or challenges for the foundation with regard to inclusion, equity and diversity.				
Our leadership team (and/or the expanded work group) has begun a dialogue about how both the internal and external diversity and equity issues and trends we have identified may impact the foundation's ability to fulfill its core mission now and in the future.				
Our leadership team (and/or the extended work group) is beginning to reach some preliminary conclusions on the most critical external trends and issues that ought to be considered in the LBE organizational change work.				
Our leadership team (and/or the expanded work group) is reaching some preliminary conclusions on the internal strengths and assets we ought to build on and the weaknesses/gaps we ought to address through the LBE organizational change work.				
Our leadership team (or the expanded work group) is reaching some preliminary conclusions on the level of consensus that exists among foundation stakeholders about the values/principles we could use to guide our LBE change work.				
We have developed a strategy/plan to test our preliminary conclusions through a wider consultation of staff, trustees, and other key stakeholders or partners (e.g., through a broader dialogue, a survey, existing sub-committees or advisory groups, etc.)				
We have identified key areas where more data and analysis are needed before we can determine the best approaches for addressing our diversity, inclusion, or equity concerns.				

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<p>The Organizational Engagement Strategy (i.e., to enlist all CF Stakeholders in the LBE Work)</p>	<p>Yes. Headed in the right direction.</p>	<p>Not sure, or could do better.</p>	<p>No. Need to clarify or refocus.</p>	<p>Comments or Notes (Related to strategy, time line, or resources)</p>
<p>The leadership team has developed a “fact sheet” or memo to inform the foundation’s stakeholders about the LBE Project (including the purpose, assessment and planning approach to be used, expected outcomes, and resources and support that are available).</p>				
<p>Our leadership team and the extended work group have launched (and is sustaining) some form of internal organizational dialogue around diversity, inclusion, and equity issues that are most relevant to the work of the foundation.</p>				
<p>With the guidance and support of our leadership team (or the work group), sub-committees of foundation stakeholders are beginning to use the data collected and other LBE resources to discuss ways in which the foundation can strengthen its diversity, inclusion, and equity policies and practices.</p>				
<p>The leadership team (or the work group) has assessed the current capacity and readiness of foundation staff and trustees to participate constructively in the LBE Project’s various organizational dialogues and assessment /planning sessions.</p>				
<p>The leadership team (or the work group) has developed a capacity building (learning) strategy and plan to support staff and trustees involved in the various LBE efforts.</p>				
<p>Moving From Dialogue & Assessment to Action Through Planning</p>	<p>Yes. Headed in Right Direction.</p>	<p>Not sure; or we could do better.</p>	<p>No. Need to clarify or refocus.</p>	<p>Comments or Notes (Related to strategy, time line, or resources)</p>
<p>The leadership team (or the work group) has considered the best approaches for embedding the LBE work in the regular planning and development processes of the foundation.</p>				
<p>The leadership team (or the work group) has developed a timeline, process that ensures the LBE work is taken up by the regular committees of the foundation--on both the staff and trustee level.</p>				
<p>The leadership team has ensured that resources (e.g., planning tools) are provided to help these committee members to sharpen their understanding of the diversity, inclusion, and equity issues that are most relevant to the purview of their committee.</p>				
<p>The planning process ensures the working committees (and the extended work group) have the opportunity to review and reach consensus on the inclusion and equity objectives that are to be included in our first LBE organizational development priorities.</p>				

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<p>Moving From Assessment & Dialogue to Action Through Planning (continued)</p>	<p>Yes. Headed in Right Direction.</p>	<p>Not sure; or we could do better.</p>	<p>No. Need to clarify or refocus.</p>	<p>Comments or Notes (Related to strategy, time line, or resources)</p>
<p>The leadership team has considered the best options for embedding the first LBE organizational development priorities in the regular planning, development, and evaluation cycles of the foundation.</p>				
<p>The leadership team has considered the practical benefits of developing an Organizational Statement that makes explicit the vision, values, and operational principles that will be used to guide our continuing efforts to strengthen our foundation's diversity, inclusion, and equity policy and practices. We will ask the committees to consider if such a statement would be helpful in measuring our progress toward these same objectives.</p>				
<p>The leadership team's timeline includes a target date for presenting the completed LBE organizational development priorities to the Trustees for approval and allocation of resources.</p>				
<p>Strategic Issues Related to Future LBE Work</p>	<p>Yes. This is on our radar screen.</p>	<p>This is not an issue right now.</p>	<p>We will approach this in another manner.</p>	<p>Notes or comments about suggested strategy or approach:</p>
<p>The leadership team has begun considering the best format for consolidating this work into an LBE organizational development plan that can be presented to the trustees and staff. Although this LBE Organizational Development Plan is likely to include a discussion of all core functional areas, the plan will also indicate our chosen place to begin among the following areas:</p> <ul style="list-style-type: none"> ◆ Governance ◆ Asset/Donor Development ◆ Business Practices ◆ Communications ◆ Grantmaking/Program ◆ Staffing, Staff Relations/Development ◆ Community Leadership/Catalyst <p>The plan will include short-term and long-term objectives, a timeline, and resources needed to achieve these objectives.”</p>				

Strategic Issues Related to Future LBE Work (continued)	Yes. This is on our radar screen.	This is not an issue right now.		Notes or comments about suggested strategy or approach:
The leadership team has considered the benefits of developing a strategy for soliciting the feedback, advice, and support of the foundation’s key civic and community partners and allies for the planned LBE work.				
The leadership team is considering what training, technical assistance, or other forms of support may be needed to fully implement the LBE organizational development objectives.				
The leadership team has developed a strategy and plan to insure resources are allocated to implement the LBE organizational development objectives.				
The leadership team is beginning to consider how the foundation will communicate its LBE Objectives and Plan after this planning process has been completed.				

General Notes:

Concerns and Issues I want to discuss With My Leadership Team Members: