United Way of Greater St. Louis

STRATEGIC TRANSITION PLANNING SERIES 2018-2019

1.11.1

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TRANSITION SERIES GOAL

Help member agencies gain competence in: navigating through environmental changes, better securing diverse & sustainable funding streams, and exploring/pursuing options, all of which enhance the fulfillment of community needs-based missions

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SERIES LEARNING OBJECTIVES

GAIN UNDERSTANDING
- About themselves, their environment & resources to better equip for adapting to a shifting funding environment

IMPROVE COMPETENCE
- In seeking funding from diverse sources, beyond United Way

BUILD PROFICIENCIES
- That improve positioning, agility and navigation through environmental changes

ADVANCE EFFORTS
- To develop and implement a strategic transition plan

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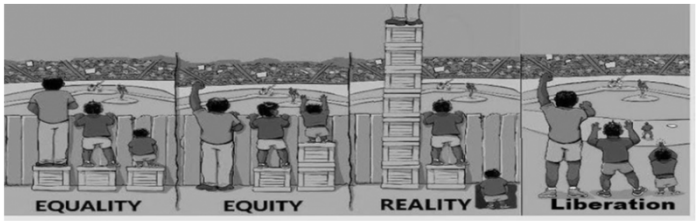
RACIAL EQUITY LENS CONTEXT



- Different communities (and individuals within communities) situated differently relative to each other
- Differences due to many factors, including history, education, language, access to community assets…
- While intent of policies & programs is to create access for all people (lifting all boats), in practice, universal policies create access to opportunity differently
- A rising tide brings less benefit or possibly hazard if one's boat is leaky or if one does not have a boat.
- Series sessions will provide an opportunity to apply a racial equity lens to topics in hopes of getting all members in our community a boat that floats so that all boats can be lifted.

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Member Agency Strategic Transition Planning Series

Stages progressively build toward culmination of helping agencies formulate a viable plan for better positioning in the current changing funding environment

Stages:	Assessing an Agency's Current Position	Creating Vision & Setting Strategic Direction	Exploring Resources	Operationalizing the Plan
Intent:	Identifies/refines critical factors that outline agency overall environmental standing, affects current success & future viability. Informs decision-making in subsequent stages	Builds understanding and approaches to change management and consider possibilities, aligned with agency position, to shape future vision & strategic direction	Uncovers resources to be utilized to leverage agency's position amidst change and augment its ability to plan for reaching vision	Aligns vision, priorities & agency position with resources to develop a strategic workplan, outlining actions helping agency better adapt to changing landscape
Sessions:	#1. Series Overview & SWOT #2. Financial Health #3. Fund Devp Tools/Techniques #4. Prgm Financial Sustainability #5. Contingency Planning	#6. Change Management #7. Innovation #8. Vision/Strategic Direction	#9. Board Engagement & Role in Fund Devp #10. Dive into Fund Development #11. Strategic Alliances - P1 #12. Strategic Alliances - P2	#13. Creating an Actionable Transiton Plan
Learning Objectives:	Participants will improve understanding about agency condition, including capabilities & vulnerabilities overall and in finance & fund development areas	Participants will shape their agency's future vision, leveraging position, in context of change, utilizing innovation, all to pursue improved mission fulfillment	Participants will identify resources (focusing on revenue generation & program/operational effectiveness) to help further mission fulfillment	Participants will utilize understanding & insight gained to frame strategic transition plan, better positioning agencies in the shifting environment
Correlating Quality Standards:	G: Board drives direction P: Effective program design G: Board financial oversight F: Financial stability F: Financial planning/oversight	G: Board drives direction G: Program effectiveness P: Program positive Impact G: Community accountability A: Structure facilitates operations	G: Board meets strategic needs F: Financial stability F: Effective financial planning G: Board accountable to community	G: Board drives direction F: Financial stability P: Program positive impact G: Board accountable to community

5.11.18

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STAGE 1: ASSESSING AN AGENCY'S CURRENT STATE

Four reasons for assessing the present state:

- Use current state as an input in planning for agency future
- Identify and prioritize areas that need to be improved and / or invested in to reach agency goals
- Explain to stakeholders why change is needed and the logic behind agency actions
- Create motivation and a common understanding among invested, impacted and interested stakeholders regarding agency conditions, capabilities, vulnerabilities, and opportunities

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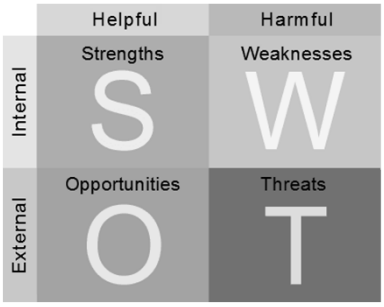
SESSION 1: SWOT Analysis

5.17.18

Presented by: Rebeccah Bennett
Emerging Wisdom

- Grounds plan
- Provides realistic view of agency's capabilities and vulnerabilities
- Identifies internal strengths and weaknesses
- Examines external opportunities and threats



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SESSION 2: Financial Health

6.14.18

Presenters: Judy Murphy & Amy Altholz
RubinBrown

Common financial sustainability benchmarks include:

- Operating reserves
- Liquidity evaluation
  - Days of Cash on Hand to Pay Expenses
  - Current Liquid Assets/Current Liabilities
- Funding gap analysis
- Diversified funding streams
- Budget vs. actual analysis

RubinBrown

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SESSION 3: Fund Development Tools & Techniques

7.12.18

Presented by: Wendy Dyer,
Wendy Dyer Fund Development Consultants

Where Is Your Program?

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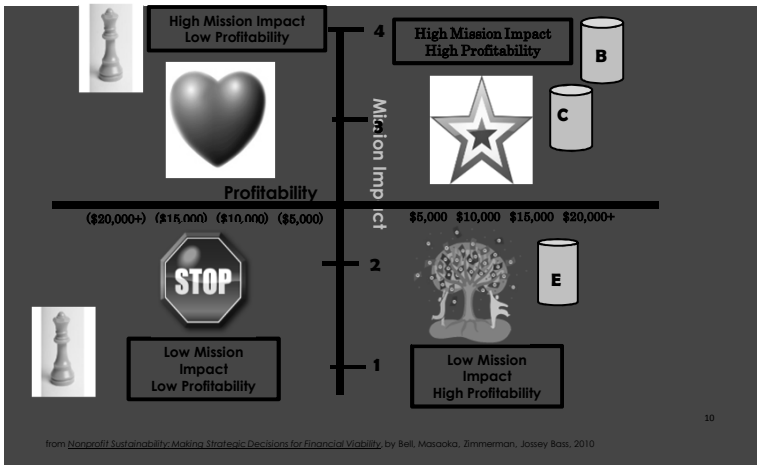
FINANCIAL SUSTAINABILITY BUSINESS MATRIX

9.13.18

Presented by Dick Goldbaum, Transitions in Leadership



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SESSION 5: Contingency Planning

10.11.18

Presented by: Pat Knoerle-Jordan
Experience on Demand

Definition: Risk mitigation process preparing an agency for potential challenges by navigating through worst-case scenarios to help ready itself for best responses if needed

Contingency Planning is used to:

- Achieve higher degree of shared experience and organizational learning
- Raise/challenge widely held beliefs & assumptions about agency and its direction
- Identify key levers to influence future course; incorporate change management into strategic analysis; & intentionally mitigate future negative impacts

Contingency Planning Model:

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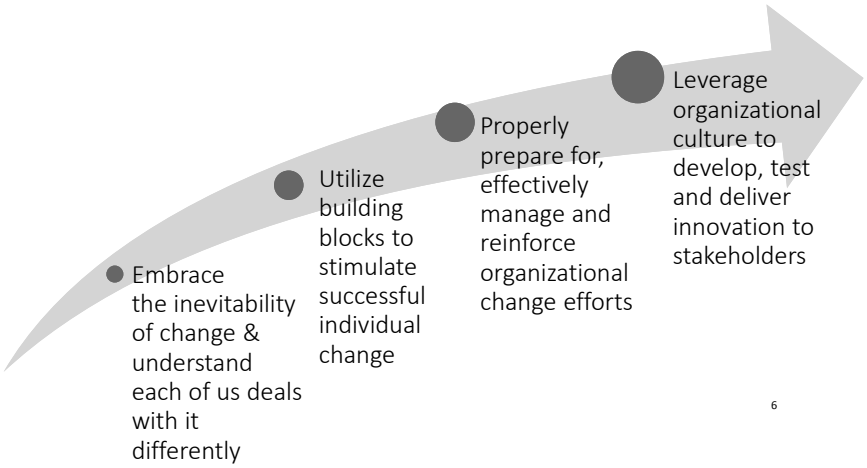
STAGE 2: PREPARING FOR CHANGE AND INNOVATION



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SESSION 6: Change Management

11.1.18

11.8.18

Presented by: Marissa Q. Paine
Painefree Coaching & Consulting

Phase 1 – Preparing for Change
- Define your change management strategy
- Prepare your change management team
- Develop your sponsorship model

Phase 2 – Managing Change
- Develop change management plans
- Take action and implement plans

Phase 3 – Reinforcing Change
- Collect and analyze feedback
- Diagnose gaps and manage resistance
- Implement corrective actions and celebrate successes

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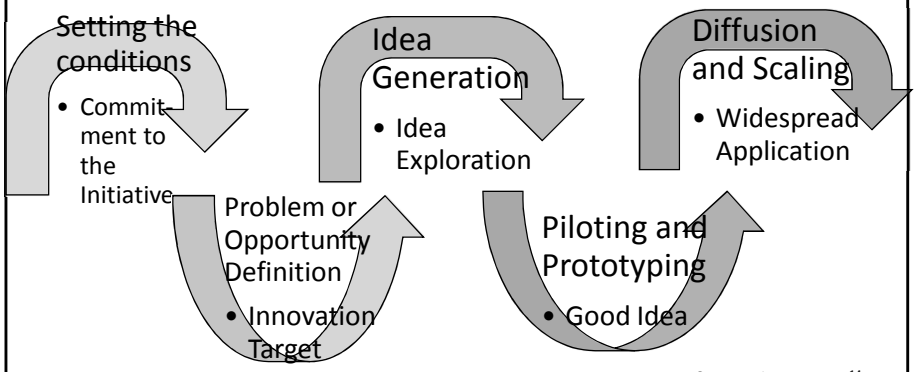
SESSION 7: Developing a Culture of Innovation

11.30.18

Presented by: Joseph T. Steensma
Washington University

Start With A Conceptual Framework:



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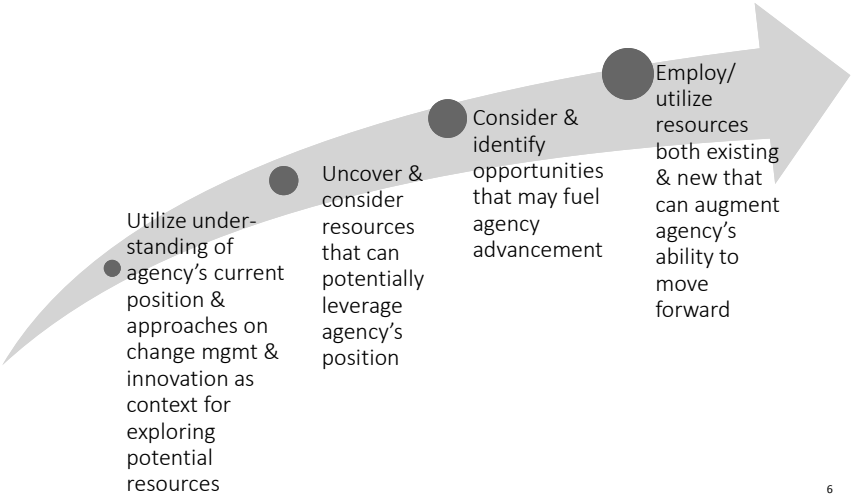
STAGE 3: EXPLORING RESOURCES



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SERIES ROLES & RULES

Roles

Facilitators

- Guides learning and sharing
- Conducts exercises
- Maintains schedule

Participants

- Are open to learning
- Share knowledge & insight
- Check for understanding

Rules

- Manage your comfort
- Listen actively
- Ask questions and encourage others to share
- Minimize distractions
- Respect all views and opinions
- Enjoy yourself!

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Member Agency
Strategic Transition Planning Series

Please contact Julie Simon at
Julie.simon@stl.unitedway.org
with questions, comments or concerns

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United Way of Greater St. Louis
STRATEGIC TRANSITION PLANNING SERIES
Session #8: Applying a Racial Equity Lens
January 11, 2019

18

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SESSION PURPOSE

- Provide context for understanding the steps necessary to move toward racial equity
- How to assess where your agency is on the pathway to racial equity, offering a baseline for moving forward

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Applying a Racial Equity Lens: Foundational Concepts and First Steps

Kira Hudson Banks, PhD

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+ Objectives

- Participants will improve knowledge about the meaning and significance of applying a racial equity lens and related terms.
- Participants will better understand how to assess their agencies' infrastructure and programs for effective equity development
- Participants will gain insight on how to integrate racial equity efforts into other agency priorities.
- Participants will advance learning about common obstacles to implementing effective strategies and how to overcome them

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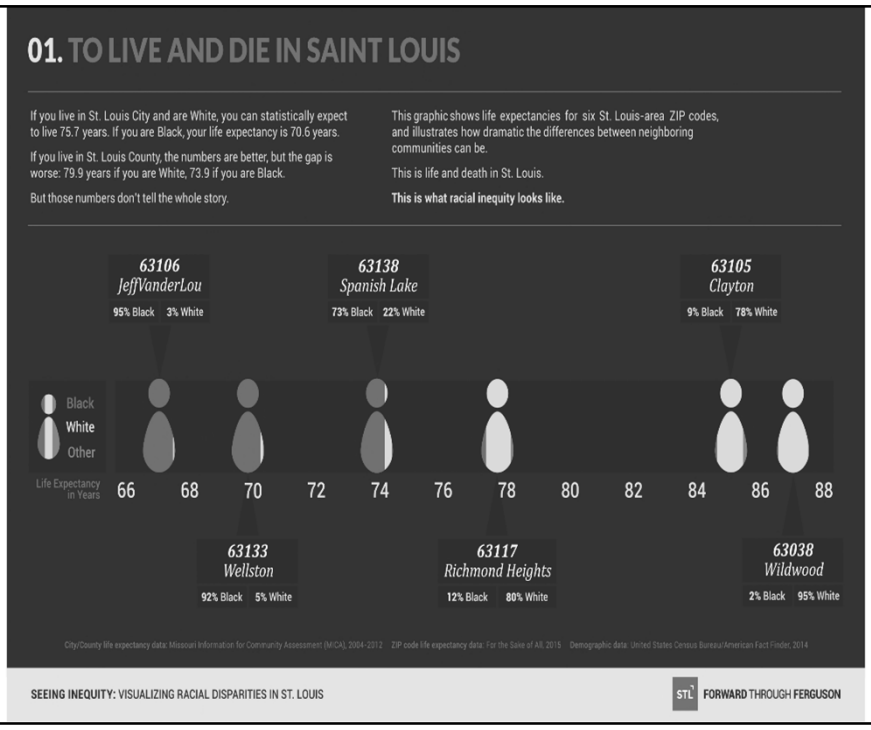

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02. TO BE BORN IN SAINT LOUIS

From 1967-1976, the infant mortality rate for White babies in St. Louis County was 13.6—meaning for every 1000 live births, 13.6 died before the age of one. For Black babies, the rate was 19.4.

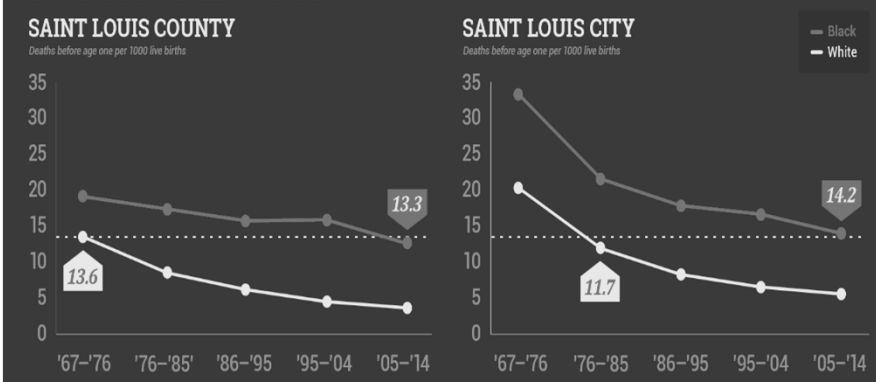
Today, thanks to advances in public health and medical technology, the infant mortality rate for Black babies in the County has come down—to the level it was for White babies five decades ago.

In St. Louis City, the rate for Black babies has come down, too—but is still higher than it was for White babies in the City four decades ago.

This is life and death in St. Louis.

This is what racial inequity looks like.

INFANT MORTALITY RATE:



1967–1976—Perinatal Mortality and Prematurity in Missouri, Missouri Center for Health Statistics (MCHS) Pub No. 4:14 Nov. 1979 1976–1985—Missouri Maternal and Infant Health Status Indicators (April 1988 Edition) ,MCHS Pub No. 6:7 1986–1995—Missouri Maternal and Infant Health Status Indicators (December 1996 Edition), MCHS Pub. No. 6:11 1995–2004 and 2005–2014—MICA **Special thanks to** Maternal, Child & Family Health Coalition for research assistance

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04. THE SAINT LOUIS LEAD CRISIS

In 2014, Flint, Michigan, became synonymous with "water crisis." Lead contamination in the city's drinking water was leading to lead poisoning in its children.

Such early childhood lead exposure can cause significant neurological and developmental damage: behavior and attention problems, loss of IQ, decreased hearing and stunted growth. These effects can hold kids back academically, and may be irreversible.

At the peak of the crisis, a full 5% of children in Flint were tested as having blood lead levels greater than or equal to 5 micrograms per deciliter, the level considered dangerously elevated by the Centers for Disease Control and Prevention (CDC).

In that same year, in St. Louis City and County, 6.6% of Black children under the age of six were tested as having blood lead levels above the CDC's threshold.

That's more than twice the percentage of White children in St. Louis City and County.

That's 32% higher than Flint in the midst of its crisis.

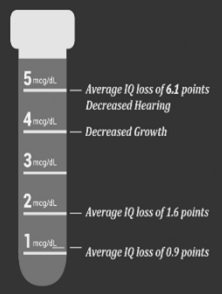
And that's not during a crisis. That's every day.

This is life and death in St. Louis.

This is what racial inequity looks like.

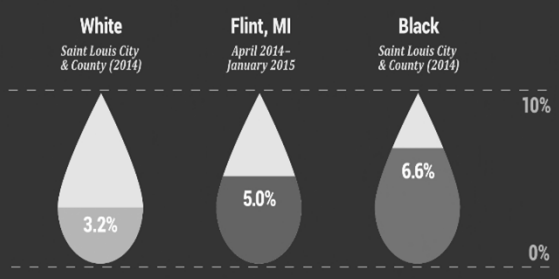
THE IMPACT OF LEAD POISONING

Negative effects of lead on children, by blood lead levels (in micrograms per deciliter)



BLOOD LEAD LEVELS FOR CHILDREN IN ST. LOUIS

Percentage of children under the age of 6 with elevated blood lead levels greater than or equal to 5 micrograms per deciliter



Effects of lead: Medline Plus, U.S. National Library of Medicine **Estimated loss of IQ:** American Academy of Pediatrics, Prevention of Childhood Lead Toxicity **St. Louis City & County blood lead levels:** Missouri Department of Health & Senior Services, Environmental Public Health Tracking Program **Flint blood lead levels:** Centers for Disease Control and Prevention, Blood Lead Levels Among Children Aged <6 Years – Flint, Michigan, 2013–2016

SEEING INEQUITY: VISUALIZING RACIAL DISPARITIES IN ST. LOUIS

STL **FORWARD** THROUGH FERGUSON

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Racial Equity

- *"A state in which a person's life outcomes cannot be predicted by race. When our regional systems (education, housing, healthcare, jobs, transportation, and more) work well for all people so that disparities are closed and all residents, regardless of their race and zipcode, have justice and the opportunity to thrive."*

Forward Through Ferguson

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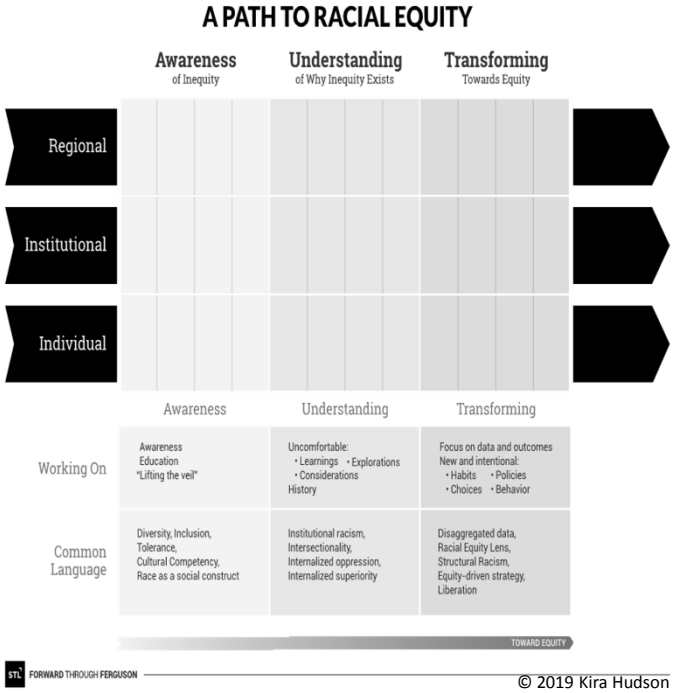

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Where is your agency on the grid?
How do you know?

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What does it mean to use a Racial Equity Lens?

- Racial justice framing puts a discussion of race and racism in the foreground of the public debate. We need to *illuminate* racism in order to *eliminate* racism. When we are not *consciously* addressing racial equity, we are often *subconsciously* replicating racism. Silence equals complicity.
- Racial justice framing includes challenging racism (anti-racism) and advocating for equitable alternatives (advancing equity). It reveals problems of racial injustice and points towards equitable solutions. It is not enough to be *reactive*; a racial justice frame needs to be *proactive*.

http://racialequitytools.org/

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What does it mean to use a Racial Equity Lens?

- Racial justice framing addresses racism *explicitly*, but not necessarily *exclusively*. If there are other significant dynamics at play (e.g. gender, economic inequality) these should also be articulated and addressed.
- Racial justice can be a complimentary frame with other frames and can help you address problems and the solutions more completely. When addressing race along with other dynamics, it's still important to address each dynamic with "dedicated, specific, and sufficient" attention.
- Racial equity framing (one that focuses specifically on remedying racism) can be coupled with a universal frame (one that seeks to benefit everyone). These can be compatible, rather than competitive, ways to frame an issue.

http://racialequitytools.org/

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+ Why Use a Racial Equity Lens?

- It reveals a reality that often goes unnamed. Ignoring racism helps perpetuates racism.
- It offers evidence of racism by documenting unequal impacts and disparate outcomes.
- It challenges prevailing cultural norms and myths.
- It emphasizes the need for institutional and policy change.
- It points to equitable solutions that address *systems* rather than *symptoms*.

http://racialequitytools.org/

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+ What are some of the challenges?

- The burden of proof falls on the advocate to prove that racial inequity exists. Few people are willing to believe racism is a factor unless you can produce clear and convincing evidence.
- Adopting a racial justice frame often goes against society's popular myths and norms. Any efforts to make racism visible are quickly dismissed as "playing the race card."
- Sometimes allies, including people of color, are resistant to using the frame for fear of "rocking the boat" or being divisive. It can evoke internal opposition within your own organization, as well as external backlash from opponents wishing to discredit and divide people.
- Systemic racism can be complicated to explain and understand. Racial justices advocates must be able to articulate how and why the issue is racialized.

http://racialequitytools.org/

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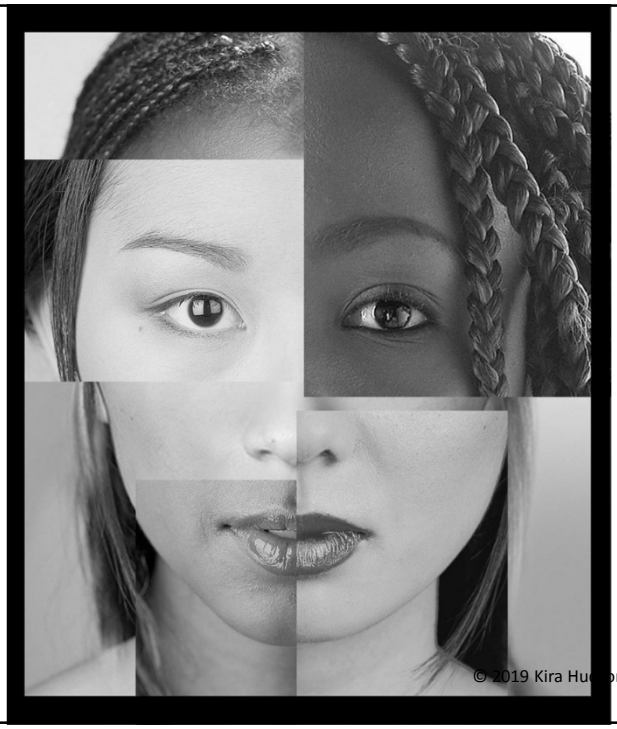

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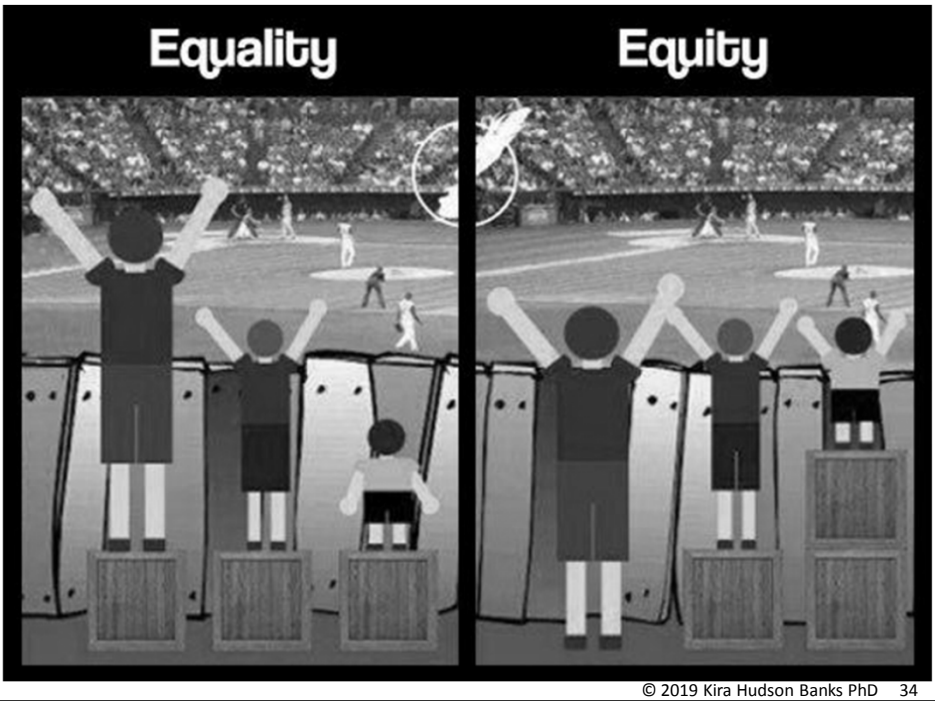

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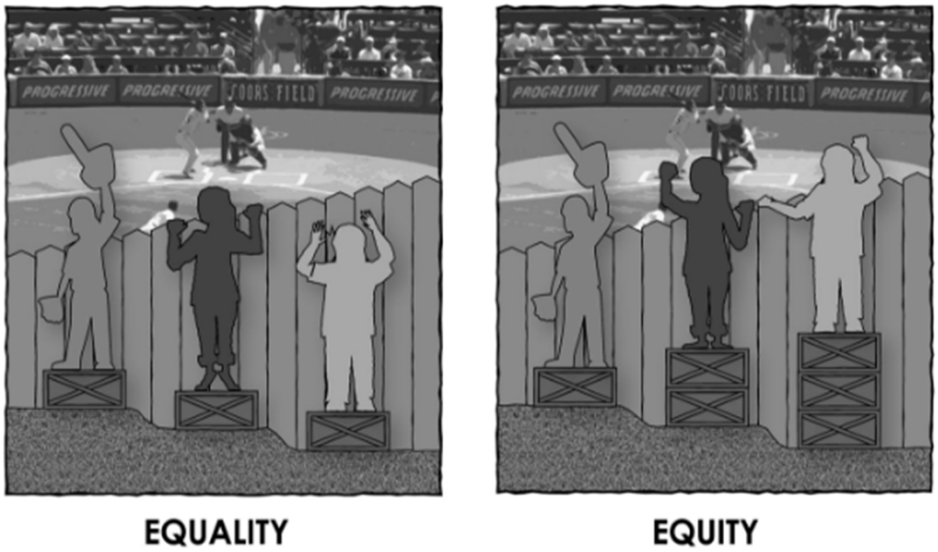

www.culturalorganizing.org

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Diversity

differences such as social identities (e.g., race, gender identity, age, religion, sexual orientation, class, physical ability, nation of origin, etc.) and can also mean other characteristic such as personality, political affiliation, etc.

- Can be numerical, interactional, and integrated in a organization's way of being

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Inclusion

a sense of belonging, which allows people to engage and contribute within an environment (the key to reaping the benefits of diversity)

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isms

- Institutionalized ism
  - Differential access to goods, services, and opportunities. There need not be an identifiable perpetrator. Can be inaction in the face of need.
- Individual ism
  - Differential assumptions about abilities, motives, and intentions of others. Differential action, intentional and unintentional; acts of commission and omission.
- Internalized ism
  - Acceptance of negative messages about ability and intrinsic worth by members of stigmatized groups.

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Questions?

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What are the implications of a Racial Equity Lens on an organization level?

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Path to Racial Equity: 6-Month Foundation

- PHASE 1: Know where you stand
- PHASE 2: Reach out to others
- PHASE 3: Plan your steps
- PHASE 4: Take action

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+ Metrics

- What metrics do you currently analyze?
- What is your capacity to disaggregate the metrics by race?
- What is the organization's tolerance to being transparent with metrics?
  - Internally?
  - Externally?

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+ SWOT Analysis and Documents

- In what ways would your SWOT analysis be impacted if your agency fully adopted a racial equity lens?
- What do your documents tell you about where your organization is on the path?
  - Common language?
  - Institutional mandate?
  - Disaggregated data?

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+ Reflection

Take the next few minutes and reflect INDIVIDUALLY on where your agency is relative to the

1) 6-month plan
2) Metrics
3) SWOT analysis
4) Documents

If time allows, talk with your table.

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Intent ≠ Impact

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Questions?

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What are the implications of a Racial Equity Lens on a personal level?

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+ Privilege

- Unearned
- Conferred
- Intersecting
- Not equal to easy or perfect

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Status Dynamics in Organizations

Elephant	Mouse
• Set and fit the norms • Often don't see their group-ness • Given the benefit of the doubt; contributions are heard	• Aware of identity and associated stereotypes • May 'cover' parts of identity to fit in/assimilate into the norm • May fear being seen as 'the exception' and having contributions overlooked

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Implications

Thinking Traps	Covering	Stereotype Threat
■ Jumping to conclusions or connecting the dots with little or distorted information ■ At play, yet with awareness, can be managed ■ Tend to favor own group, which makes awareness key	■ Individuals may downplay their identity in order to 'fit in' with workplace norms ■ Occurs with greater frequency within historically underrepresented groups ■ Known to impact employee confidence and engagement	■ Individuals may experience anxiety when they have the potential to confirm a negative stereotype about their social identity group ■ Can impede performance and limit authentic connection ■ May shape perceptions/ interactions

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Unconscious Bias

A rigid belief, positive or negative, about a group of people that is based on limited evidence.

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How can you tell you've "got" it?

- If you are surprised or annoyed when someone doesn't conform to your beliefs
- When you label that one individual as the exception to the rule

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What can you do about it?

- Be on the look out for self-fulfilling stereotypes
- Go out of your way/expand your comfort zone to connect and see things from a different perspective
  - Attitudes can follow behavior

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+ Microagressions

"Microaggressions are brief and commonplace daily verbal, behavioral, or environmental indignities, whether intentional or unintentional, that communicate hostile, derogatory, or negative racial slights and insults toward people [in marginalized groups]."

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Questions?

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What are your 3 next steps?

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- MYTH: It's always been like _____, and it always will be.

- REALITY: The only thing we can count on is change.

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THANK YOU

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