



INCLUSION, DIVERSITY, EQUITY, AND
ACCESSIBILITY [IDEA] INSTITUTE:

STRATEGIC PLANNING GUIDE | 2023

Vermont Center for Crime Victims Services

TABLE

OF CONTENTS

Acknowledgements	1
Letter from Jennifer Hurlbut Poehlmann Executive Director, Vermont Center for Crime Victim Services	2
Limits + Considerations	3
Overview + Objectives	4
Foundational Language	6
From the Field Spotlight: Victim Services in Colorado Examined from An Equity Perspective Report (2021)	9
Section 1: Ant-Oppression Frameworks	10
From the Field Spotlight: Theory of Change Model from the Domestic Violence Evidence Project	15
Section 2: Mission + Diversity Statement	26
From the Field Spotlight: The Children's Advocacy Center of Kent County	27
Section 3: Where Are We? Assessing the Present	28
Section 4: Where Are We Going? The Path Forward	32
From the Field Spotlight: Community Resource Mapping	35
From the Field Spotlight: Vermont Judiciary to Hold Public Forums on Diversity, Equity, and Inclusion in the Court System	47
Section 5: How Will We Get There? IDEA Strategic Plans	48
Section 6: Are We Getting There? Assessing Impact	50
Appendices	56
Appendix A: Sample Team Work Plan	57
Appendix B: Continuum on Becoming A Transformative Anti-Oppression Organization	58
Appendix C: Social Identity Worksheet	59
Appendix D: Organizational Diversity, Inclusion, and Equity Self-Assessment ..	62
Appendix E: Stakeholder Mapping	70
Appendix F: List of Values	75
Appendix G: Principles, Goals, and Actions Alignment Worksheet	78
Appendix H: SMART Goals Worksheet	80
Appendix I: The Diversity, Equity, and Inclusion Metrics Inventory	81
Appendix J: Action Plan Guide	82
Appendix K: Timeline + Benchmarks	83
Image Descriptions (Alternative Text)	85
References	90

ACKNOWLEDGEMENTS

Prepared by: Kendra Malone (they/them)

For: The Vermont Center for Crime Victim Services

December 2022 | January 2023

Editor: Jessica d'Artagnan Love [she/her], Professor, Purdue University Global

Design: Kendra Malone [they/them] + Ray Duran [he/they]

Cover Art: AI Generated by MidJourney [Alt Text: Three faces situated with one in the front and two a short ways to the back on either side. Figures are various shades of brown. The center and right figure are wearing headwraps. The left and center figures have white short hair. They are elders.]

CONTENT ADAPTATIONS + INSPIRATION

Gratitude for the ideas, community building, and equity-focused work to the many who have created and shared resources to support others in deepening their inclusion, diversity, equity, and accessibility (IDEA) practices. The following organizations and documents provided foundations for the one you read today. Detailed references are included at the end of this guide.

Anti-Oppression Training and Resource Alliance (AORTA) | <https://aorta.coop/>

Strategic Planning for Equity, Inclusion, & Diversity: Toolkit. Division of Equity and Inclusion. UC Berkeley | <https://diversity.berkeley.edu/programs-services/diversity-planning/toolkits-and-resources>

Emergent Strategy Ideation Institute | <https://esii.org/>

The Commons: Social Change Library | <https://commonslibrary.org/>

CREATIVE COMMONS

This work is licensed under the Creative Commons Attribution-NonCommercial 4.0 International License. To view a copy of this license, visit <http://creativecommons.org/licenses/by-nc/4.0/> or send a letter to Creative Commons, PO Box 1866, Mountain View, CA 94042, USA.

You may reproduce, adapt and share the enclosed material but we ask that you follow these guidelines: Attribute (you must attribute the work in the manner specified by the author or licensor), Noncommercial (for noncommercial use only), Share Alike (any alterations, transformations, or if you build on this work you can distribute under license identical to this one).



Center for Crime Victim Services
58 South Main Street, Suite 1
Waterbury, VT 05676-1599
www.ccvs.vermont.gov

[phone] 802-241-1250
[phone] 800-750-1213
[fax] 802-241-1253 (Victims Compensation only)
[fax] 802-241-4337 (General fax)

*"We allow our ignorance to prevail upon us and make us think we can survive alone, alone in patches, alone in groups, alone in races, even alone in genders."
Maya Angelou*

Dear Colleagues:

As the Executive Director of the Vermont Center for Crime Victim Services, I am excited to announce the establishment of our Equity Institute. We believe it is critical for professionals working in the field of victims' services to prioritize equity and inclusion in their work.

As we all know, victims of crime come from all walks of life, and providing meaningful support and opportunities for achieving self-defined justice can be impacted by a wide variety of factors, including race, ethnicity, gender, sexual orientation, religion, age, poverty, and disability. These factors are magnified in Vermont, which is tied for second to last place in the US Census bureau's diversity index. This reality implores us to ensure that all victims have equitable access to the assistance and resources they need to heal and rebuild their lives.

Unfortunately, traditionally underserved communities often face additional barriers to accessing services and justice. To achieve justice that is victim-centered, it is incumbent on us to be pro-active and incorporate equity plans into our work. By raising our consciousness, opening our hearts, and building sensitive and welcoming programs, we can ensure that all victims are treated with the respect and dignity they deserve. It is critical that we eliminate the disparities that impede justice for all. This will involve challenging ourselves as well as the systems that we work within.

Through our Equity Institute, we hope to provide a space for professionals to learn, grow, and develop the skills and knowledge we all need to serve all victims equitably. We also hope to grow partnerships and collaborations with community organizations and advocates to better understand and address the needs of traditionally underserved populations.

By working together and committing to equity with intention, we can create a more inclusive and just society for all. We are so glad you are joining us in this important effort.

Sincerely,

A handwritten signature in blue ink that reads "Jennifer Hurlbut Poehlmann".

Jennifer Hurlbut Poehlmann
Executive Director



LIMITS + CONSIDERATIONS

Inclusion, Diversity, Equity, and Accessibility (IDEA) work is a long game.

As we continue to endeavor to create and maintain increasingly equitable and inclusive working environments, services, communities and interpersonal relationships there will be mistakes, growth, humbling, learning, and so much joy.

We give ourselves permission to simultaneously be messy, to make errors while also holding ourselves and the organizations we are a part of accountable to addressing the harmful realities of oppression.

To those with significant social privilege - it is your responsibility to course correct oppression. All can contribute AND it is those who strike the blow that must calm their fist.

Let us be patient with ourselves and others. Let us move through barriers with ease. Let us continue and celebrate...

***“It can be difficult to speak truth to power.
Circumstances, however, have made doing so increasingly necessary.”
– Aberjhani***

OVERVIEW + OBJECTIVES

CONNECTING IDEA + ANTI-OPPRESSION + VICTIM SERVICES

Take a moment to reflect upon the last time you felt included, enthusiastically embraced, in a place. Where were you? What took place to let you know that you belonged there? What was said? How did it make you feel?

The art of inclusion is value-based principles moved into action, and commitments to rectifying historic and contemporary social harms. It begins with self-awareness coupled with intentional relationship building during which we are open to correction and responsive to the experiences of communities impacted by systems of oppression. The Vermont Center for Crime Victim Services recognizes the necessity of integrating equity into all facets of our mission to support individuals and communities impacted by violence. As such, you are invited to learn, grow, and make mistakes in the name of doing better and taking responsibility for your contributions to both harm and liberation.

This Inclusion, Diversity, Equity, and Accessibility (IDEA) Strategic Planning Guide, created specifically for victim services providers, will support your organization in strengthening its ability to:



FOSTER AN INCLUSIVE WORK CULTURE



ALIGN YOUR MISSION AND VISION WITH IDEA PRINCIPLES AND PRACTICES



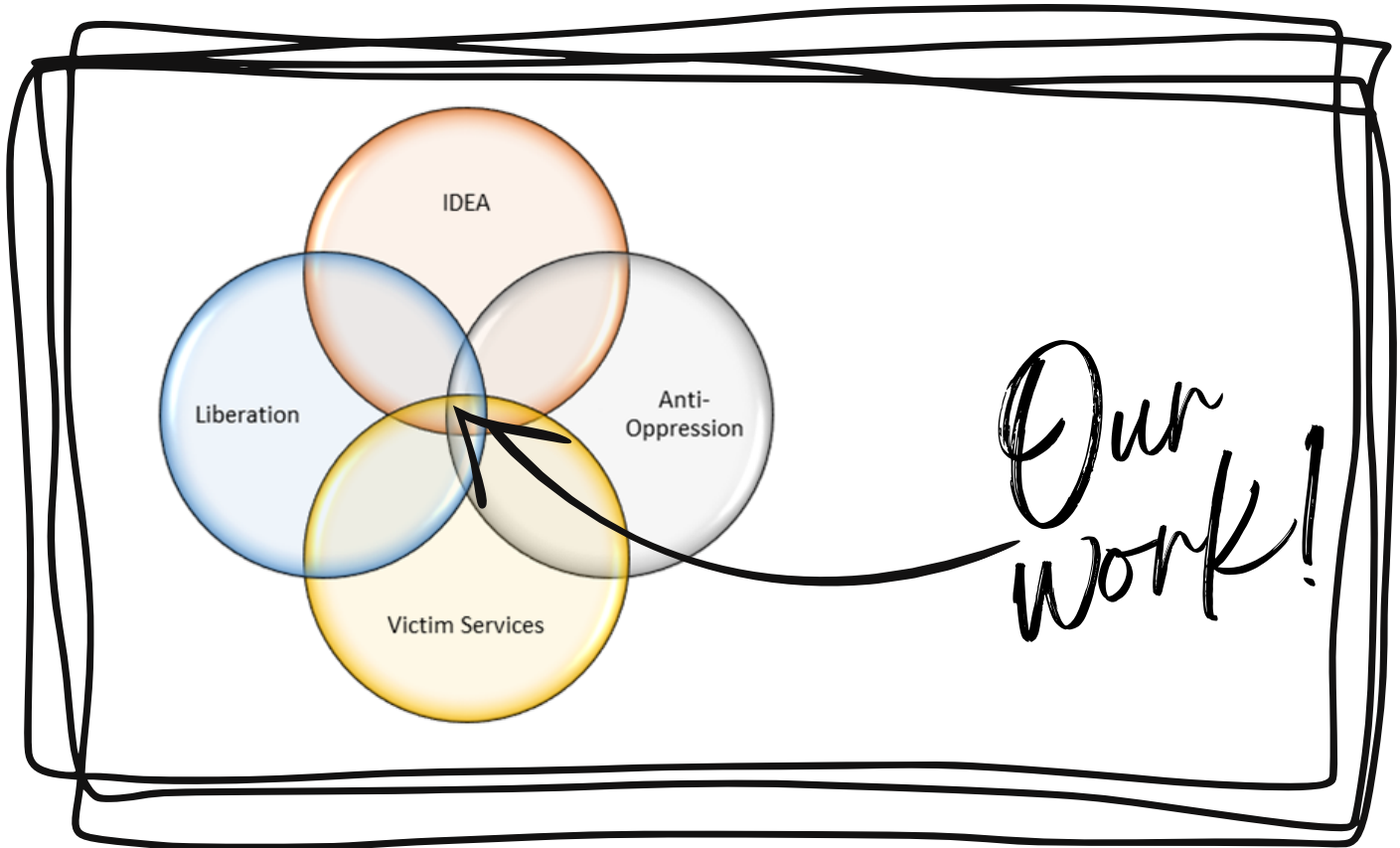
ADDRESS INSTITUTIONAL SYSTEMS OF OPPRESSION;



PROVIDE EQUITY-CENTRIC SERVICES

CONNECTIONS: IDEA, ANTI-OPPRESSION, LIBERATION, AND VICTIM SERVICES

This IDEA Strategic Planning Guide uses an intersectional, anti-oppression, and liberation-based framework. The root causes of discrimination, prejudice, bias, and violence lie within interwoven systems of oppression that cause harm to marginalized communities by limiting access to the resources needed for living and thriving.



THE IMPORTANCE OF LANGUAGE & ITS FLUIDITY

It is important to note that the concepts inclusion, diversity, equity, and accessibility (IDEA) are not bound by the same cultural and social understandings. That is, IDEA theories and practices are culturally influenced and understood differently depending upon on one's society. Here we are using U.S. - based definitions. We recognize the inherent problem with offering definitions related to these elements of social experience, as they can not be representative of all community members. As such, we offer these definitions as a starting point for understanding the nuances of IDEA work, social identity, and to mark the significance of attempting, as imperfect as it may be, to increase the inclusion of and repairing harm to communities subjected to oppression and marginalization in our American cultural systems.

DESIGN OF LANGUAGE

You're not underrepresented -- you've been systematically excluded.
You're not a minority -- you've been systematically minoritized.
You're not underserved -- you've been systematically disinvested in.
You're not at-risk -- you've been systematically placed at-risk.
(Ogorchukwu/@ogorchukwu, 2023)

Inclusion

Inclusion is a state of being valued, respected and supported. It's about focusing on the needs of every individual and ensuring the right conditions are in place for each person to achieve his or her full potential... Inclusion is the process of creating a working culture and environment that recognizes, appreciates, and effectively utilizes the talents, skills, and perspectives of every employee; uses employee skills to achieve the agency's objectives and mission; connects each employee to the organization; and encourages collaboration, flexibility, and fairness.

(U.S. Department of Housing and Urban Development, n.d.)

Inclusion refers to "the act or practice of including and accommodating people who have historically been excluded (because of their race, gender, sexuality, or ability)."

(Merriam-Webster, 2023, para. 4).

Diversity

Diversity refers to the variety of personal experiences, values, and worldviews that arise from differences of culture and circumstance. Such differences include race, ethnicity, gender, age, religion, language, abilities/disabilities, sexual orientation, socioeconomic status, geographic region, and more (University of California Berkeley, 2015).

Equity

When a person or group receives the unique opportunities needed to reduce or eliminate barriers, equity is demonstrated. It is a process that begins by acknowledging an unequal starting place and works to correct and address imbalance. Equity ensures that people have the opportunity to grow, contribute, and develop, regardless of their identity

(Center for Excellence in Nonprofits, 2021).

Accessibility

Accessibility refers to the equitable right, engagement, or entry for everyone, regardless of human ability and experience. For organizations, it refers to how they encompass and celebrate characteristics and talents that each individual brings. It is about representation for all (Center for Excellence in Nonprofits, 2021).

Intersectionality

The Oxford Dictionary defines intersectionality as “the interconnected nature of social categorisations such as race, class, and gender, regarded as creating overlapping and interdependent systems of discrimination or disadvantage”.

Intersectionality is the acknowledgement that everyone has their own unique experiences of discrimination and oppression and we must consider everything and anything that can marginalize people – gender, race, class, sexual orientation, and physical ability, etc. First coined by Professor Kimberlé Crenshaw back in 1989, intersectionality was added to the Oxford Dictionary in 2015 with its importance increasingly being recognised in the world of women’s rights (Taylor, 2019).

All forms of inequality are mutually reinforcing and must therefore be analyzed and addressed simultaneously to prevent one form of inequality from reinforcing another.

Intersectionality brings our understanding of systemic injustice and social inequality to the next level by attempting to untangle the threads that create the complex web of inequalities. It is also a practical tool that can be used to tackle intersectional discrimination through policies and laws (Center for Intersectional Justice, n.d.).

Marginalization

The process in which groups of people are excluded by the wider society. Marginalization is often used in an economic or political sense to refer to the rendering of an individual, an ethnic or national group, or a nation-state powerless by a more powerful individual (“Race Equity Glossary of Terms,” n.d.).

In general, marginalizing refers to the process of relegating, downgrading, or excluding people from the benefits of society (Dwivedi, Khator, & Nef, 2007).

Anti-Oppression

Power and privilege play out in group dynamics in harmful ways. Anti-oppression practices, then, provide a framework for constructively addressing and transforming oppressive dynamics as they play out in interpersonal, communal, social, and organizational spaces (“Anti-oppression,” n.d.).

Liberation

The gaining of equal rights or full social or economic opportunities for a particular group, including the protection from abuse or exploitation. It is ultimately freedom from oppression, and allowing one to be their whole self (Center for Excellence in Nonprofits, 2021).

All efforts to effect real and lasting change in social systems that constrict and restrict, via systemic and institutional oppression, for all of our lives. The key to this statement is that it advocates for real and lasting change, not short-term change that can be undermined when circumstances change (Ingham, 2007).

Victim Services

Violence, in all its forms, is born out of the consequences of and responses to systematic oppression. Victim services seek to provide support and resources to those who have experienced violence and its subsequent traumas. Violence is rooted in the intersections of the multitude of ways oppression manifests (i.e. patriarchy, heterosexism, racism, sexism, ableism, ethnocentrism, genderism, etc.). The history of victim services and advocacy are rooted in community organizing, activism, anti-oppression, and liberation efforts.

Please note that the terms victim and survivor are used interchangeably to honor the myriad of ways those who have experienced violence and trauma identify with the experience.

During OVC's webinar "A Vision for Equity in Victim Services: What Do the Data Tell Us About the Work Ahead?" Heather Warnken, Executive Director for Criminal Justice Reform, University of Baltimore School of Law (2021) notes, "Also key to this conversation, is the importance of expanding and maintaining diverse stakeholder relationships, including proactive efforts toward inclusivity of orgs that are not currently, or have ever, been funded by VOCA. And notice I didn't say new organizations. Many of these programs and organizations have been around doing this work in trenches, filling gaps in our communities for decades, they have just never been funded for a long list of reasons by VOCA in the past. And having a more inclusive conversation and collaboration with these voices is essential."

From the Field Spotlight

VICTIM SERVICES IN COLORADO EXAMINED FROM AN EQUITY PERSPECTIVE REPORT (2021)

Colorado Criminal Justice Reform Coalition (CCJRC)

In fiscal year 2019, Colorado allocated \$75 million in state and federal funds for victim services across the state through three different grant programs.

The research for this report examines aspects of the funding and the field of victim services and its impact on underserved and marginalized people. The findings demonstrate that **systemic racial/ethnic inequity is deeply ingrained in the structure and delivery of victim services.**

The sad reality is that this is not new news. The victim services field has, for decades, acknowledged the **gaps and lack of competency in serving victims of color**, particularly African Americans.

The report **amplifies the disparities within the victim services field**, based both on programmatic data and from interviews with leaders of color in the field. CCJRC offers the following five recommendations specifically to policymakers and eight recommendations specifically to agency leadership/grant administrators.

Legislators

1. Utilize innovative models for community engagement to make resources more accessible to under-resourced communities
2. Create equitable opportunities for people of color to participate in formal decision-making
3. Require better data collection for VALE state and VALE local funding
4. Substantially increase state funding for victim services
5. Implement an advance reimbursement model

Department Leadership & Program Administrators

1. Create community-led equity funding standards and funding plans
2. Fund culturally specific program costs for under-resources communities
3. Create efficiencies for small organizations to support complex organizational needs
4. Provide victim services funding only to community-based organizations that are independent of the criminal justice system
5. Create transparency in VOCA emergency funding
6. Utilize state VALE competitive funding to engage communities of color and identify training and capacity building needs
7. Utilize racial equity lends in rule development
(Bradbury, 2021)

Section 1: Anti-Oppression Frameworks



A Theory of Social Change (TOSC) is your organization's story—explaining how your organization understands, plans, and acts to build a better world. These components are often referred to as your assumptions, analyses, strategies, values, and visions. From an organizational process standpoint, a TOSC generally follows the creation of organizational vision, mission, and values statements, and precedes the creation of a strategic plan (Kawoaka-Chen & Powers, 2009).

A TOSC statement is a tool to understand your strategy and how (or if) it will work. Being able to articulate a clear TOSC statement is a prerequisite to an effective strategy (Ganz, 2016).

Theory of Social Change

Social Change Theory of

How you approach the development of your organization’s IDEA strategy and implementation plan will become your TOSC in practice. As you work through this guide, it is imperative that you keep in mind the strides your organization has made thus far and the barriers you have encountered as you develop your vision for the future.

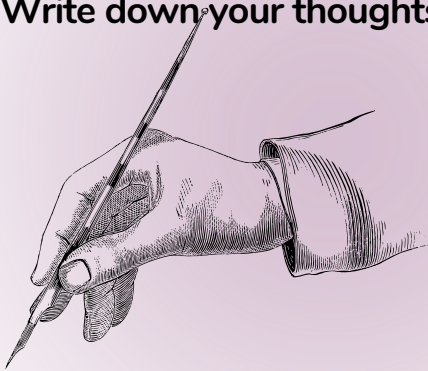
Take a moment to review **Appendix B: Continuum on Becoming A Transformative Anti-oppression Organization** to gauge where your organization is currently positioned.

This guide will act as a bridge between applying theories of social change and more traditional approaches to meaningful organizational growth.

Theory of Social Change	Logic Frames (e.g., Strategic Plan or Logic Model)
Determines overall approach	Details how you control the resources (links activities to outcomes)
Provides analysis (“how” and “why”)	Outlines a program’s components
Social Change Goals	Service Goals
Resources You Have	Resources You Need
Strategies	Activities
Explanatory (describes how change is made)	Descriptive
Visually compelling (connects the dots)	Detailed narrative (explains rationale)
Evaluation and monitoring focuses on learning and telling story of impact	Evaluation and monitoring focuses on justification, input, output, and outcome based on logic plan
Continuously evolving framework	Fixed timeline (often 3-5 years)

Reflections

Write down your thoughts and feelings about where your organization is presently.



REMEMBER

As you work through this guide, your organization will spend significant time taking a historic inventory of IDEA efforts, to reflect on successes and challenges while also taking an honest look at what can be reasonably accomplished in relation to various measurements of capacity.

Remember, the process, approaches, collaborations, and intentionality that inform planning and implementation are a part of the changes you seek as well as defined outcomes.

ANTI-OPPRESSIVE PRACTICE (AOP)

VALUING COMMUNITY CONTRIBUTIONS

Anti-oppressive practice values the contribution of community and institutional change processes in achieving broader social change. Our efforts embody principles of social justice activism by working to not only provide services to service users, but to also raise the consciousness of those they are working with, to externalize their problems, and to understand how social inequality and structures of oppression work to create disadvantaged life circumstances in areas like housing, employment, healthcare and education. (Matthews, et. al., 2020). AOP reconciles and provides a path to link social work theories and values with practice utilizing 5 critical practice principles (Healy, 2014):



Critical Reflection on Self in Practice



Critical Assessment of Service Users' Experiences of Oppression



Empowering Service Users



Working in Partnership

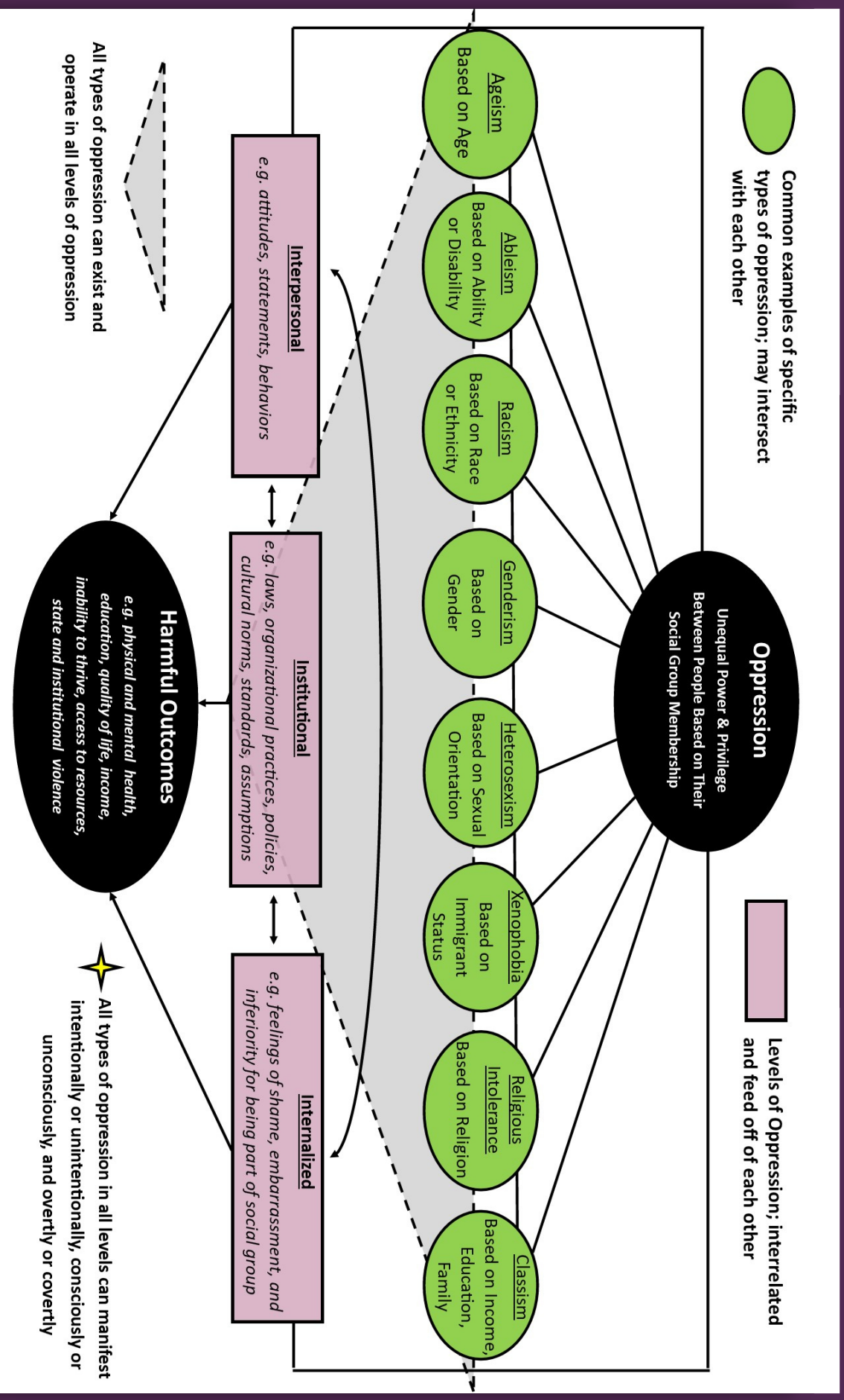


Minimal Intervention

POWER & PRIVILEGE

In addition to understanding that oppression is both a state and a process and that the process of oppression can be done through imposition and deprivation, it is also important to clarify two key and necessary components of oppression—Power and Privilege. By its very definition oppression does not exist if there is no power and privilege inequality between people. Power may be defined as people's access to resources that enhance their chances of getting what they need in order to lead safe, productive, and fulfilling lives. It is the capacity to exert force, influence, or control over one's environment in order to get what one wants. Control over one's environment includes control over other people, organizations, and institutions. Power also includes the social system of individuals, institutions, and cultural norms, standards, and assumptions that support, justify, legitimize, and protect certain worldviews and behavior (David, & Derthick, 2017).

Oppression Operationalized



(David, & Derthick, 2017).

From the Field Spotlight

THEORY OF CHANGE MODEL FROM THE DOMESTIC VIOLENCE EVIDENCE PROJECT

National Resource Center on Domestic Violence

The Domestic Violence Evidence Project of the National Resource Center on Domestic Violence created a **Theory of Change Model** that demonstrates an approach to identifying:

- a) What they hope to accomplish within their work,
- b) How and why they expect the desired change to occur, and,
- c) How they will get there.

Question addressed by the model:

How do domestic violence services promote survivors' social and emotional well-being?

The diagram on the next page illustrates the Theory of Change guiding the work of domestic violence (DV) programs. Specifically, the long-term objective of domestic violence programs is to enhance the well-being of survivors and their children.

There is ample empirical research demonstrating that social and emotional well-being is evidenced by:

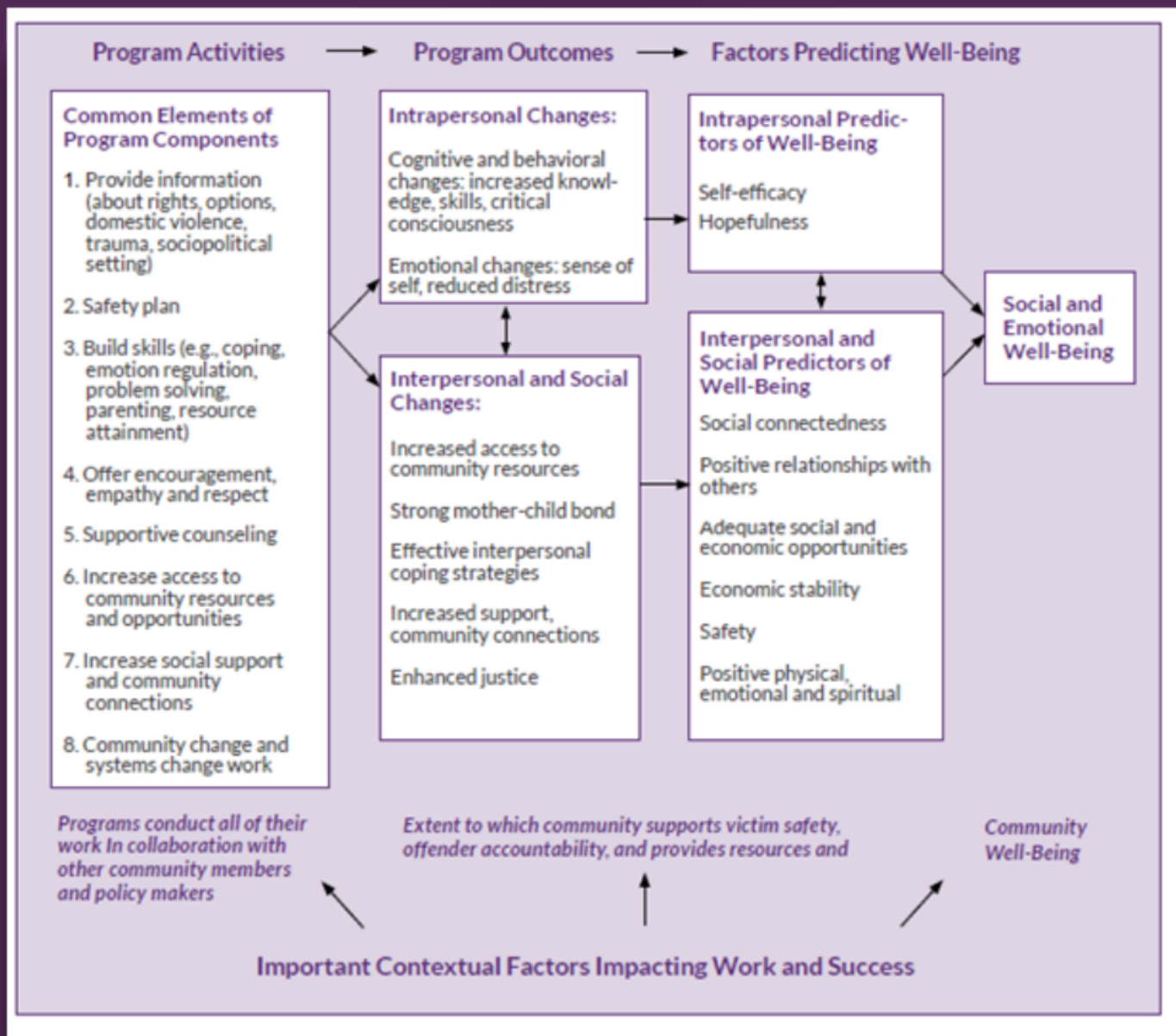
1. self-efficacy,
2. hopefulness,
3. social connectedness,
4. safety,
5. having adequate social and economic opportunities,
6. economic stability,
7. enhanced justice, and
8. good physical, emotional and spiritual health.

Domestic violence programs are invested in impacting these eight factors for both survivors and their children through efforts targeting multiple levels of change. Their work is designed not only to create intrapersonal change in survivors' thinking, belief systems, and emotions, but also to create the interpersonal and social changes necessary for the outcomes to be achieved (National Resource Center on Domestic Violence, n.d.).

Domestic Violence Evidence Project

Theory of Change

How do domestic violence programs promote survivors' social and emotional well-being?



(National Resource Center on Domestic Violence, n.d.)

NAMING POWER DYNAMICS

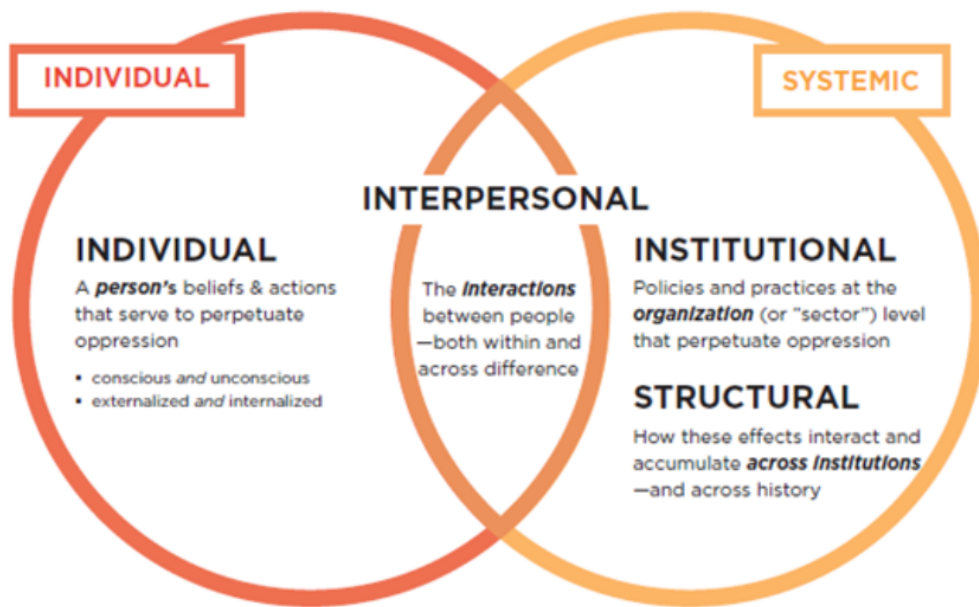
INDIVIDUAL | INTERPERSONAL | INSTITUTIONAL | STRUCTURAL

Our social identities, both assigned and/or embraced, and subsequently the communities these identities create or exclude powerfully influence our lived experience. American cultural hierarchies, and the power bestowed or denied within them, manifest in layered and often hidden realities that significantly impact individuals and communities subjected to marginalization.

To deepen our ability to foster inclusive, welcoming, and responsive organizations it is necessary to dedicate our time, intellectual capabilities, and emotional labor to naming power dynamics as they exist in our organizations, communities, and interpersonal relationships. This exploration and naming can be one of the most challenging aspects of IDEA work as it asks us to look at the very real harm systems of oppression create and as a result those we perpetuate individually and collectively. Therefore, it is imperative that during this journey we take care of ourselves and each other, being ever mindful to not expect or shift the bulk of emotional and psychological labor onto those most impacted by oppression.

*compassionate
self-awareness*

THE LENS OF SYSTEMIC OPPRESSION



(National Equity Project, n.d.)

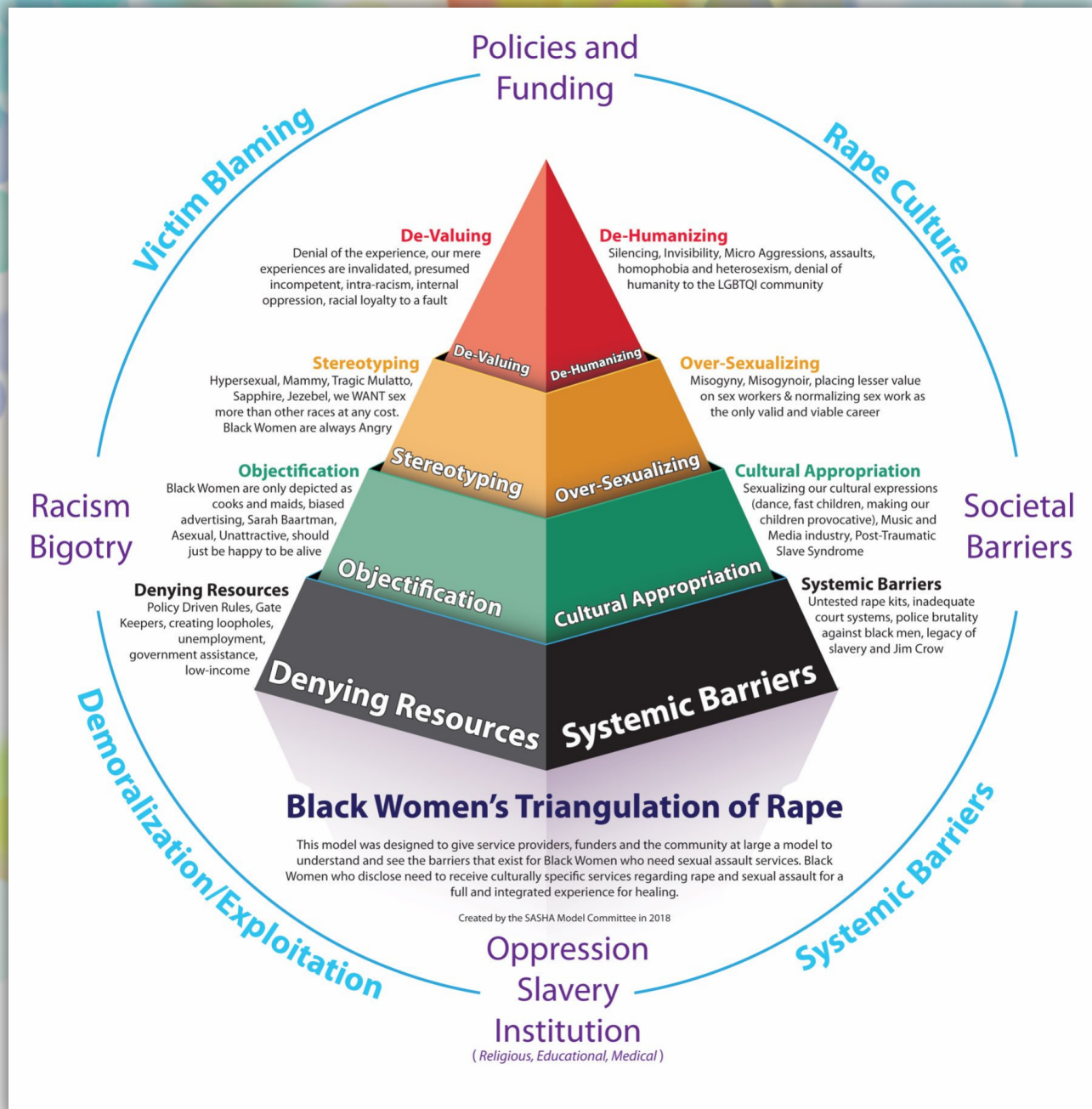
THE LENS OF SYSTEMIC OPPRESSION ASSUMES THAT

- All negative forms of prejudice and/or bias are learned and therefore can be unlearned.
- Oppression and injustice are human creations and phenomena and therefore can be undone.
- Systemic oppression exists at the level of institutions (harmful policies and practices) and across structures (education, health, transportation, economy, etc) that are interconnected and reinforced over time.
- Oppression and systematic mistreatment (such as racism, classism, sexism, or homophobia) is more than just the sum of individual prejudices.
- Systemic oppression is systematic and has historical antecedents; it is the intentional oppression of groups of people based on their identity while privileging members of the dominant group (gender, race, class, sexual orientation, language, etc.).
- Systemic oppression manifests in economic, social, political and cultural systems.
- Systemic oppression and its effects can be undone through recognition of inequitable patterns and intentional action to interrupt inequity and create more democratic processes and systems supported by multi-ethnic, multicultural, multi-lingual alliances and partnerships.
- Discussions addressing oppression and bias will usually be accompanied by strong emotions.

(National Equity Project, n.d.)

THE SASHA MODEL: BLACK WOMEN'S TRIANGULATION OF RAPE DIAGRAM

A demonstration of the intersectional nature of oppressive power dynamics at play



(Sasha Center, 2023)

SOCIAL LOCATION

Your social location, which is informed by your social identities, shapes your human experience. Things like access to the needs of daily living including the quality of resources and ease of access influence your social position. Values and moral codes including how those are enforced and the consequences for operating outside of convention impact your social location. Relationship building practices, as well as conceptions of faith, the human body, autonomy, and violence all contribute to the human experience. These spheres are interwoven into a rich tapestry of this experience of living. They create meaning and lead to behaviors that are exercised as social norms. When actively lived, these concepts are based in systems of power and determine who is given access to wielding said power.

Individual

The social identities you claim and/or are assigned to you by cultural systems.

Communal

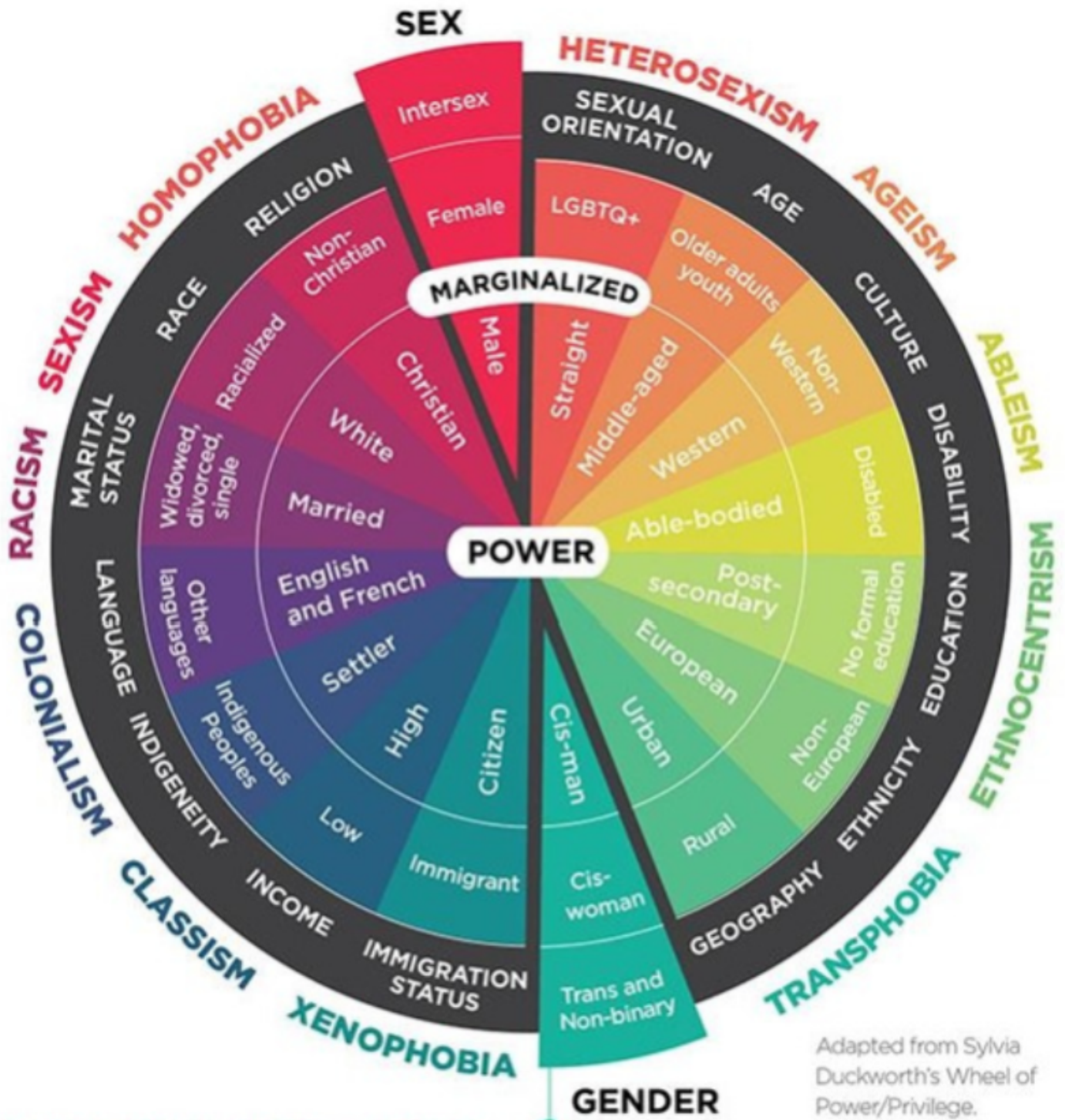
A collective, a group of people organized around social identities, common interests, necessity or by force.

Professional/Organizational/Labor Based

A group of people organized for labor in exchange for capital, a resource required to access the daily needs of living to survive. The nature and purpose of labor varies greatly. Types of labor are valued based upon the priorities of those most socially privileged in a cultural system. Those privileges are often taken through violent means.

Societal

Groups and their systems operating in the service of diverse objectives. Designed largely by a communal group of individuals with the most social power and subsequently privilege



Some gender identity terms include:

Agender	Genderfluid	Gender neutral	Transgender man
Bigender	Genderqueer	Non-binary	Transgender woman

(Bauer, 2021)

POWER & MARGINALIZATION WHEEL

EXPLORING OUR IDENTITIES & SOCIAL LOCATIONS

To meaningfully engage with IDEA work in our organizations with the goal of affecting liberatory change for those most impacted by oppression, it is imperative that we understand how we fit within the American cultural schema of power and oppression.

Complete **Appendix C: Social Identity Worksheet** to get a sense of your social location. Once you've completed it reflect on:

1. How did completing it make you feel?
2. Does anything surprise you? Worry you?
3. How do the identities that you carry, both those claimed and those assigned (correctly or not), impact how you do your work? Influence how you are treated?
4. What benefits have your privileges granted you professionally?
5. Do you belong to communities that experience marginalization? If so, how has that impacted you professionally?
6. Often when we reflect on our privileges, we can experience guilt, shame, and discomfort:
 - a. Why do you suppose these are common emotional reactions to reflecting on our privilege?
 - b. What can we do to move through these emotions to continue to support interpersonal and organizational IDEA priorities?
- c. What skills do you need to strengthen and what support do you need to better manage this barrier?
- d. How have the privileges you hold negatively impacted:
 - Your colleagues?
 - Your work environment and culture?
 - Those you serve?
 - Your collaborators?
- e. Think of a time when someone made you aware of the fact that you were operating from a place of privilege and that it had a harmful impact:
 - Describe the scenario to yourself
 - How did you feel when this was brought to your attention?
 - How did you respond?
 - Are you pleased with how you responded? Or could it have gone better?

Moving forward, when you are made aware of your privilege and emotional and ego-based barriers present themselves, what strategies can you employ to:

- a) respond from a place of your values rather than reacting from privilege, and
- b) remain open to correction and feedback about the impact of your privilege?

Note: We all hold privilege and experience oppression throughout our lives. However, given the realities of American cultural systems and the value (or lack thereof) placed on communities, the reality is that privilege is granted more readily to some than others.

EMERGENT

“E-V-E-R-Y-T-H-I-N-G—is connected. The soil needs rain, organic matter, air, worms and life in order to do what it needs to do to give and receive life. Each element is an essential component. “Organizing takes humility and selflessness and patience and rhythm while our ultimate goal of liberation will take many expert components. Some of us build and fight for land, healthy bodies, healthy relationships, clean air, water, homes, safety, dignity, and humanizing education. Others of us fight for food and political prisoners and abolition and environmental justice. Our work is intersectional and multifaceted. Nature teaches us that our work has to be nuanced and steadfast. And more than anything, that we need each other—at our highest natural glory—in order to get free.”

adrienne maree brown, *Emergent Strategy: Shaping Change, Changing Worlds* (2017).

STRATEGY

Emergent Strategy is a humble philosophy, a way to acknowledge the real power of change, and be in the right relationship to it. Its intent is to deepen relationships, build trust, and political alignment.

Emergent strategy practices strengthen imagination and the capacity to think beyond the limitations of socialization. These limitations include competition, binaries, and linear, short-term outcomes (Emergent Strategy Ideation Institute, 2023).



CORE PRINCIPLES

Small is good, small is all

The large is a reflection of the small

Change is constant

Be like water

There is always enough time for the right work.

There is a conversation in the room that only these people at this moment can have. Find it

Never a failure, always a lesson

Trust the People

If you trust the people, they become trustworthy

Move at the speed of trust

Focus on critical connections more than critical mass

Build the resilience by building the relationships

What you pay attention to grows

Less prep, more presence

Reflection

Given what we know about the operations of privilege, power, and oppression, how can we create and implement IDEA strategies that function both within the realities of highly structured, oppression saturated systems (our organizations), and the expansive models presented throughout this section?

Respond to that question as it relates to each of the Emergent Strategy Core Principles, specifically highlighting how each applies to deepening IDEA practices at your organization.

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.

Section 2

Mission & Diversity Statement

Mission

Your organization's mission is its guide post. It is the values that inform how you operate and engage with those you seek to serve. Explore the evolution of your organization's mission. When was it crafted? Who was involved? Has it changed? How does the mission connect with the anti-oppression frameworks outlined in this guide?

Diversity Statement

What is a diversity statement?

A diversity statement for your organization is a written explanation of its commitment to diversity, equity, accessibility, inclusion for its employees and customers. It tells stakeholders how diversity fits into your organization's mission and values (Doeing, 2019). Creating a diversity statement involves considering the experiences and needs of both the internal and external stakeholders of your organization.

Do you have a diversity statement?

If so, take this opportunity to review it and determine if it still meets the needs of your organization and the communities you serve.

If not, what would be the best way to communicate the organization's values and commitment to IDEA in such a statement?

How to write a diversity statement:

1. Craft a powerful headline
2. Use positive language
3. Cite specifics
4. Keep it the right length
5. Make data available

(Doeing, 2019)

To learn more: <https://learn.g2.com/diversity-statement>



From the Field Spotlight

THE CHILDREN'S ADVOCACY CENTER OF KENT COUNTY

Grand Rapids, Michigan

The Children's Advocacy Center of Kent County in Grand Rapids, Michigan has a clear diversity, equity, inclusion, and belonging statement that expresses both their values and commitment...

At the Children's Advocacy Center of Kent County, We Value:

All races & ethnicities
All religions
All countries of origin
All gender identities
All sexual orientations
All abilities & disabilities
All languages

...

Our commitment to diversity, equity, inclusion, and belonging is demonstrated through:

- Global Capacity Building Committee
- Continual learning opportunities for our Board
- Community Partnerships
- Reducing Barriers

...

To successfully assess and support child victims of suspected sexual assault and educate children and the community to prevent such assaults, prioritizing diversity, equity, inclusion, and belonging is vital. Child sexual abuse may happen to anyone across any demographic. To hear the story, heal the pain, and halt the cycle we provide an accessible environment where all feel welcome, safe, and valued for who they are (Children's Advocacy Center of Kent County, 2023).

To read their full statement visit:

<https://www.cac-kent.org/our-services/deib/>



SECTION 3: WHERE ARE WE? ASSESSING THE PRESENT

Taking an inventory of our past and current IDEA efforts calls for celebration! Whether you've been participating in this work for years or are new to this endeavor, accounting for progress gives us a broader perspective from which we can envision our next steps.

Questions for Consideration

- What has IDEA work looked like at your organization historically?
- How long have IDEA efforts been an intentional priority?
- What materials are available that help tell this story?

Organizational Capacity

An organization's capacity is its potential to perform – its ability to successfully apply its talent and resources to accomplish stated goals and satisfy stakeholder expectations. Capacity is the engine that drives performance and makes it possible for an organization to meet its goals and achieve its overall mission. Simply put: Capacity = Ability to Perform (Weber, & Smith, 2023).

Capacity "is an abstract term that describes a wide range of capabilities, knowledge, and resources that nonprofits need in order to be effective." Capacity needs will vary depending on a range of factors such as the organization's size, lifecycle stage, program model, revenue base, or the capacities of complementary organizations working in the same community or field (Weber, & Smith, 2023).

It's surprising how many persons go through life without ever recognizing that their feelings toward other people are largely determined by their feelings toward themselves, and if you're not comfortable within yourself, you can't be comfortable with others.

- Sydney J. Harris

Common Organizational Capacities:

- **Leadership:** Build staff and board leadership, invest in talent development and executive transition planning.
 - **Mission, Vision and Strategy:** Conduct organizational planning, assessment and development.
 - **Program Delivery:** Execute program design, delivery and evaluation.
 - **Fund Development:** Develop and implement fundraising strategy and plan for and execute other revenue-generating activities.
 - **Financial Management:** Manage day-to-day activities and long range plan to ensure financial health.
 - **Communications:** Use marketing, online presence, media relations and social media to raise awareness and attract attention and resources to the organization or issue.
 - **Technology:** Build and use internal IT systems needed to facilitate the work.
 - **Strategic Relationships:** Establish connections with colleague organizations, stakeholders and decision-makers that can help advance the mission and possibly spark collaboration.
- (Grantmakers for Effective Organizations, 2014, para. 6).

IDEA Capacity

To be most effective in our IDEA initiatives it is imperative that we understand our capacity to achieve the outcomes we strive for. Presently, what capacity do you have to grow or launch IDEA efforts in the following categories?

Personnel Time | Policies and Procedures | Governance | Leadership | Financial Resources and Allocation | Coordination | Services Planning and Delivery | Collaboration (Internal/External) Communication (Internal/External) | Servers and Data Tracking | Evaluation

See *Appendix D: Organizational Diversity, Inclusion and Equity Self-Assessment Tool* for a template.

Taking a holistic look at these organizational functions will provide valuable insight into what is successful, what is missing, areas for improvement, and potentially areas where harm is being caused.

ENVIRONMENTAL SCAN

A component of your self-assessment is to conduct an environmental scan that includes stakeholder mapping. Identifying those individuals, groups, organizations, and institutions who are currently undertaking IDEA work is important because:



You don't want to duplicate efforts



There will be opportunities to support existing work



Centering the experiences and needs of communities most impacted by oppression must inform the approach to any IDEA efforts



Individual work related to self-awareness and understanding one's own contributions to systematic oppression is an important undertaking



Healing and growing trusting relationships takes place within collaboration and co-creation. The work done within an organization in conjunction with that undertaken with community partners is where the change takes place.

Self-awareness is the launching point for deepening the work within the institutions that seek to provide services and resources. Remember, as challenging as it is to take responsibility, it must be done to decrease our non-profits, governmental offices, and private sector actors destructive impact to communities subject to marginalization (unintentionally or otherwise). Keep this reality at the forefront of your efforts as naming harmful practices and implementing strategies to move away from the consequences of oppression is our primary objective.



Section 4

Where Are We Going?



The Path Forward

It cannot be said enough that all services to victims of crime must be victim-centered, culturally appropriate, and accessible. As these fundamental characteristics underlie each standard and definition for services to victims of crime, each indicator is shaped with the same intent. Essentially, successful victim service providers use flexibility, innovation, and persistence to promote fair access and benefits of service—no matter the barriers and challenges that must be addressed and overcome to achieve this (DeHart, 2003).

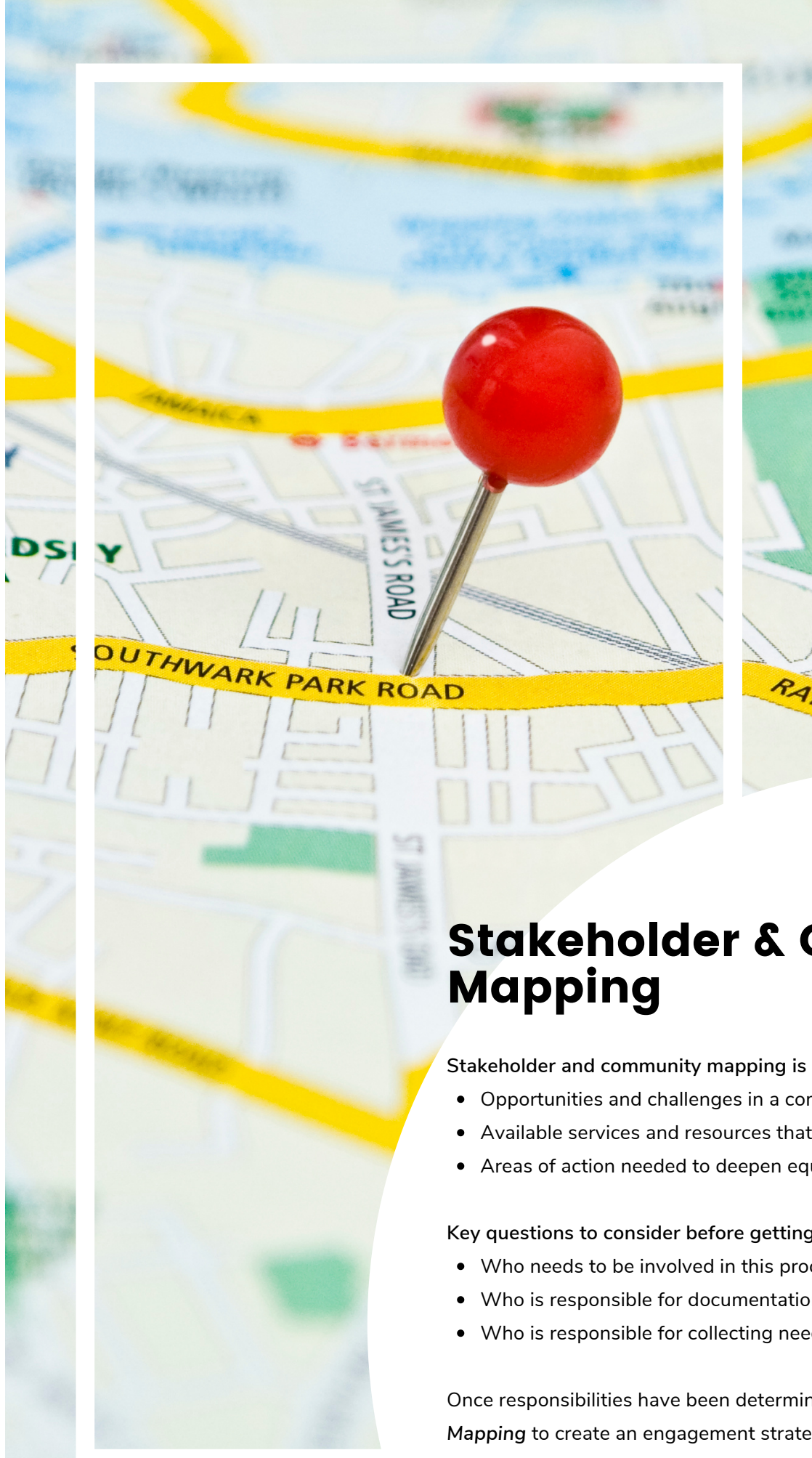


To Serve

Our organizations operate to serve our communities during some of the most challenging times in their lives. Therefore, we have an added responsibility to excel at our service and resource provision.

We are for our communities, in all of their robust richness. To grow in our capacity to be responsive to our diverse communities, as pointed to in the previous excerpt, we are invited to become increasingly mindful and action-oriented around addressing systematic oppression.

To accomplish this we must go to our communities for their insights and expertise. We will begin with a stakeholder mapping exercise that will expose those areas of our communities in which we hold meaningful and supportive relationships, and those parts that require intentional effort and increased care.



Stakeholder & Community Mapping

Stakeholder and community mapping is used to identify:

- Opportunities and challenges in a community,
- Available services and resources that are aligned and streamlined,
- Areas of action needed to deepen equity.

Key questions to consider before getting started:

- Who needs to be involved in this process?
- Who is responsible for documentation?
- Who is responsible for collecting needed materials?

Once responsibilities have been determined See [Appendix E: Stakeholder Mapping](#) to create an engagement strategy.

From the Field Spotlight

COMMUNITY RESOURCE MAPPING

Improve client-centered communication and coordination among services to Survivors of Interpersonal Violence in the Peel Region (March 2018)

The Family Services of Peel (Canada) was established as a multidisciplinary collaborative initiative among agencies in the Region of Peel working towards the eradication of violence. Established through Family Services of Peel, the organization aims to prevent violence, evaluate the impact and effectiveness of agency services, adapt services and programs to be more focused on survivors' needs, and improve the coordination of services for all victims of violence including men, women, youth, seniors, aboriginals and people with disabilities (Family Services of Peel, 2023).

The ultimate goal of this mapping is to ensure that all communities have equitable access to an integrated system of services that are essential in achieving desired outcomes for everyone. Community resource mapping is used to identify gaps and challenges in a community and improve services by aligning available services and resources, and streamlining those services and resources, and then recognizing areas of action.

With a collaborative grant from the Region of Peel and additional funding support from Family Services of Peel, this mapping project was initiated to address the following objectives based on the findings from the previous literature review and research study:

1. To create a common language, understanding and communication strategy in order to strengthen the collaboration of services in Peel
2. To develop active engagement of collaborating partners in a physical mapping exercise of all community resources in Peel for Survivors of Interpersonal Violence (SOIV).
3. To determine the gaps in service provision.
4. To identify gaps in communication and to improve coordination among agencies with a particular emphasis on referral loop (Family Services of Peel, 2023).



Visit their online community map here: **[Resources Map for SOIV' in Peel](#)**

COMMUNITY RESOURCE MAPPING

Survivors of Interpersonal Violence in the Peel Region (March 2018)



(Family Services of Peel, 2023)



Identifying Priorities & Goals

In the previous section you identified your organization's capacity for IDEA work. Additionally, in the Pre-Institute Assessment you identified two organizational IDEA priorities. Use these materials as reference to guide your work in this section.

Values

To begin, make a list of your organization's values. See ***Appendix F: List of Values*** for examples.

From this list select the top 5 most influential values and list them below:

1

2

3

4

5





Write a statement for each value, identifying why it is important to the organization, how it reflects the mission, and how it relates to IDEA efforts.

Statements



1

2

3

4

5





What feedback have you received from those you serve, community partners, staff, or others invested in your work, relating to initiatives that made them feel especially valued and supported? What was shared regarding areas of improvement?

Feedback



Creating Priorities

Given this feedback what will be your organization's IDEA priorities? See **Appendix G: Priorities, Goals, and Action Alignment Worksheet**

When drafting your priorities consider:

- Who are you accountable to for these priorities?
- What communities depend upon you?

Revisit **Appendix E: Stakeholder Mapping** to inform your response.

Potential IDEA Priority Areas

Community engagement, outreach, and partnership development **1**

Service and support recipients and data collection **2**

Organization workforce and professional development **3**

Organization policy **4**

Program and service evaluation **5**

Funding and resource allocation **6**

Clarifying Priorities



1 Urgent & Important

This work is the highest task priority level. You need to make space in your schedule to get these done as soon as possible.

2 Important, Not Urgent

This work is stuff you have to get done, but you can work it into your schedule when it's convenient.

3 Urgent, Not Important

These tasks have a looming deadline, but they shouldn't steal time from important work. If you can delegate these jobs to someone else, that's ideal.

4 Not Important or Urgent

These tasks are ones you can ignore. Ideally, you dump them from your schedule so you aren't tempted to fiddle with them. (Sherman, 2020).





Organizational IDEA Priorities



Priority #1

Priority #2

Priority #3



Setting

SMART GOALS

Next, determine what your organization needs to accomplish to address these priorities in a manner that is in alignment with your mission and the values you have identified as it relates to IDEA.

Using the SMART method outlined below create three IDEA goals your organization needs to set to grow what has been successful and/or to address gaps or problems as identified in your reflection on the feedback you've received from various communities.

See **Appendix H: SMART Goals Worksheet**

SMART stands for specific, measurable, attainable, relevant, and time-bound.

Specific: The goal you set needs to be precise, explicit, and unambiguous. This is also true of how you plan to achieve that goal.

Measurable: The goal must be measurable according to quantitative analysis. You need a way to track your progress toward the goal.

Attainable: The goal should be realistic and achievable. If it's not realistic, there is no point in setting it in the first place.

Relevant: Your goals need to be relevant to the situation and work toward supporting diversity and inclusion.

Time-bound: The goals must be time bound or adhere to a deadline. If you don't have deadlines, you may not be motivated to achieve the goal quickly. A deadline is also a great way to keep track of progress on a linear scale. (Kristenson, 2022).

Keeping your values and priorities in mind respond to the following questions:



What challenges do you anticipate while working on your priorities?



Recalling what you learned in your organizational capacity self-assessment, what infrastructure is already in place to support the desired outcomes? What needs to be strengthened and added?



Successful organizational culture shifts and expanding inclusiveness in service and program delivery requires strong support and involvement from leadership. Given your leadership role, how will you model IDEA principles in the service of IDEA goals?



What financial resources have you dedicated to IDEA initiatives? What financial resources will you dedicate moving forward? Is there a line item in your organizational budget? If not, explore dedicating specific financial resources for this work.



In addition to yourself, as an organizational leader, who else will be responsible for accomplishing IDEA goals? How will those people be identified and invited to participate? What would it look like to review all personnel job descriptions and incorporate this work into everyone's duties?



It's important to remember that IDEA work is often made the responsibility of people of color, LGBTQ folx, people living with disabilities, women, and other personnel who belong to communities subjected to marginalization and oppression. Be mindful to not place additional responsibilities on these people simply because of the identities they carry.



How much time each week, month, quarter of personnel time is necessary to meaningfully move IDEA efforts forward?

Impacts & Outcomes

Create a timeline with key benchmarks to guide your workflow. Think about the outcomes you seek. **What will it look like realized?** Take time to envision the goals realized, and write about it.

- Who is involved?
- What has been accomplished?
- How do the people involved feel?
- What will successful feedback sound like?
- What organizational culture shifts will you see?



Once you have taken the opportunity to write this reflection, start there, and work backwards.

- What benchmarks will signal we're on a productive path?

Review **Appendix A: Sample Team Work Plan**



Remember, the process is just as important as the outcome. What practices and procedures need to be implemented to keep the process centered in IDEA? See **Appendix B: On Becoming a Transformative Anti-Oppression Organization**

Accountability & Sustainability Recommendations:



Include a 15 minute IDEA Initiatives review on each staff meeting agenda



Convene an internal IDEA working group to guide efforts



Seek and secure funding for personnel time to be committed to IDEA



Subcontract with a community partner with experience in your IDEA priorities to guide your work



Schedule monthly 3 hour work sessions dedicated to moving IDEA initiatives forward

TOP 3 IDEA GOALS

Now that you have identified organizational values, priorities, and thought through equity-centric processes - what three IDEA goals will you pursue?

These will be what you grow and work towards in the IDEA Action Plan Guide (Appendix J) your organization creates.

Goal #1

Goal #2

Goal #3

From the Field Spotlight

VERMONT JUDICIARY TO HOLD PUBLIC FORUMS ON DIVERSITY, EQUITY AND INCLUSION IN THE COURT SYSTEM

Juliet Schulman-Hall | December 1, 2022 | VTDigger

“Vermont Supreme Court commission is organizing a series of public forums to discuss diversity, equity and inclusion practices within the state’s judiciary system.

It plans to hold meetings in all 14 counties, with the first taking place in Burlington’s Fletcher Free Library on Dec. 6 at 6 p.m.

The Commission on Diversity, Equity, and Inclusion, co-chaired by Chief Justice Paul Reiber and Associate Justice Nancy Waples, is made up of 14 individuals across three committees. It was created earlier this year to address disparities in the justice system.

Waples, the first person of color to be appointed to the Vermont Supreme Court, said the goal of the public forums is to take the “pulse of the community in terms of how they feel that we as the judiciary are doing our work” and “serving justice” in a way that doesn’t have a disproportionate impact on people of color. She said she believes that the “most critical aspect” of the commission’s work will take place through its community engagement committee

“This work is vital to the health of our justice system, and all can play a part in improving it,” Reiber said in an op-ed in November.

Racial disparities in the judicial system continue to be a problem in Vermont, one of the whitest states in the nation. According to a study published by the Council of State Governments in April 2022, Black people were six times more likely to be in Vermont’s sentenced incarcerated population than white people in fiscal year 2019. They were over 14 times more likely to be defendants in a felony case between 2014 and 2019” (Schulman-Hall, 2022, para. 1 - 7).

[Read the article here](#)

A winter scene with snow-covered trees and warm lights against a sunset sky. The trees are bare and their branches are silhouetted against a warm, orange and pink sky. The ground is covered in snow. The overall mood is cozy and serene.

Section 5: How will we get there?
IDEA STRATEGIC PLANS

**Envision
IDEA
Outcomes**

1

Dream big! With collaborators and stakeholders describe the programs, environment, and overall feel of accomplishing your goals.

2

What will interactions between invested people look like?

3

What will be different about the organization and its culture?

4

What will feedback from staff describe? From clients? From collaborators?

6

What challenges do you anticipate facing as you move through this work? How will you work through those challenges?

5

What tools will you use to not get detoured by the emotional distress contending with oppression and privilege will ultimately create?

7

Now that you have a collective vision in mind, use that vision and the completed materials listed above to create the implementation plan.

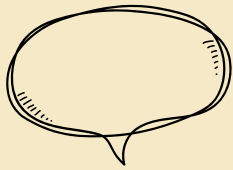
See **Appendix I: Action Plan Guide** to identify the actions, tasks, and practices needed to accomplish your IDEA goals.

Are We Getting There?

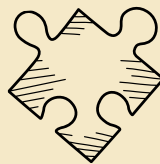
Section 6: Assessing Impact

The methods you use to evaluate the success of your efforts will depend on a variety of factors.

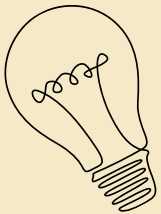
See Appendix J: DEI Metrics Inventory



What do you plan to accomplish?



What is the organization's capacity?



How will data be collected and used?




Any funder, governmental, or legal requirements?



What will intentional collaboration look like?


Further resources: [The Institute for Economic and Racial Equity \(2021\) created an extensive catalog of Diversity, Equity, and Inclusion \(DEI\) organizational assessment tools. Review it here.](#)

TELL YOUR STORY

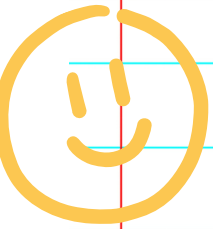


As you work with collaborators to identify the method(s) that will most meaningfully demonstrate impact, also consider the story you hope to tell.

The process by which your organization works towards its IDEA goals is just as important as the outcomes. Tell your IDEA story. Using all of the information you have gathered by working through this guide and your implementation plan, create a collective story about the journey thus far.



IN WRITING YOUR STORY CONSIDER...



1. What has worked well?



2. What needs improvement as you move into implementation?

3. What checks and balances are being used to name the influences of privilege?

4. How are you responding to differing viewpoints and experiences?

5. Doing IDEA work is challenging.

Try as we might to avoid it, those of us with many social privileges, are likely to cause harm to those whose lived experiences are impacted by oppression.

How will you hold yourself and those with similar privileges accountable?

Be specific about accountability practices.

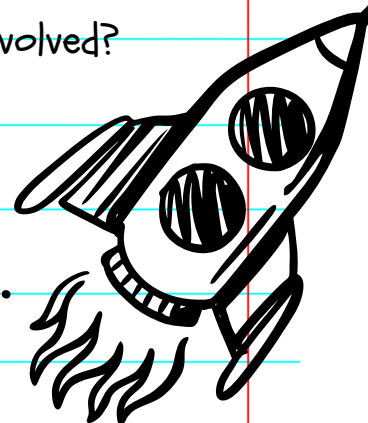
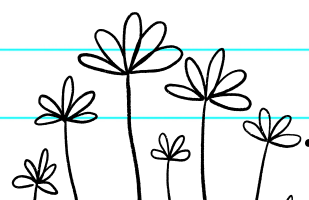
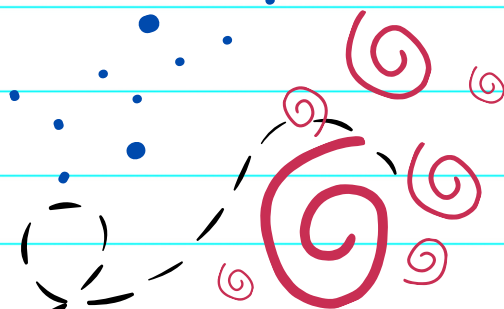
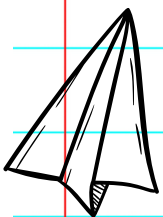
6. How will you grow your skill set to be increasingly open to correction and responsive to the needs of those harmed?

7. Name three ways you will intentionally foster joy and celebration in building the relationships and trust necessary to move this work forward?

(Regular dance parties anyone?).

8. How will you maintain progress?

9. How will you take care of yourself, the people implementing this work as well as the larger community that will necessarily be involved?



7 PRACTICES FOR BUILDING A CULTURE OF ACCOUNTABILITY ROOTED IN ANTI-RACISM

✓ **Acknowledge harm**

First, you have to acknowledge that when harm happens, it doesn't just affect the individuals involved but everyone within the organization. Too often, tepid attempts to address acts of racism only trigger deeper divides among team members because the full community was not engaged in the process of repairing the harm. An acknowledgement of harm is clear, direct, and focuses on the impact, not the intent.

✓ **Establish a set of internal anti-racist norms**

Many organizations have a set of public-facing values that guide their work. But organizations must also define the internal behavioral norms that inform how staff treat each other. While values represent ideals that we want to live up to, norms are acceptable behaviors and attitudes that are socially enforced. In a culture of accountability, norms must set the standard for anti-racist practice and set clear boundaries in relationships. Accountability structures must also be in place if those norms are not honored.

✓ **Work to repair the harm**

Repairing damaged relationships and broken trust will require time and regular check-ins to understand what people need and how those needs can be met. It's important to center the needs of the person who has experienced the harm while also engaging others in thinking about what change needs to look like. What does redress for this particular act look like?

✓ **Skilled facilitation**

Bring in a skilled facilitator to lead a process of conflict transformation with the parties involved or of community restoration with the entire organization. Facilitation only works if both parties are invested in preserving the relationship. In the case of a termination, the person who committed the harm may not even participate. Facilitating a process that addresses racial harm begins with an assessment of who is involved, takes their accounts of the incident, and asks what they hope to achieve. People should not be coerced into participating in the process, lest it breaks down and deepens the fractures in their working relationships.

PRACTICES FOR BUILDING A CULTURE OF ACCOUNTABILITY...

✓ **Racial affinity groups**

The formation of racial affinity groups can create space for peer learning, healing, and mutual accountability. White affinity groups must have an explicit agenda focused on anti-racist learning and practice. In this group, white staff can reflect on the ways they will participate in dismantling white supremacy and be more effective allies to their colleagues of color. These steps are not about shame or blame but about taking responsibility for improving the culture of the organization for everyone. For employees of color, affinity groups can provide a space to process instances of racial harm, offer mutual support, and identify strategies to eliminate conditions that made racial harm possible.

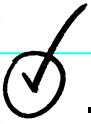
✓ **Create feedback loops**

Creating accessible structures for giving and receiving feedback is another vital component. These might range from anonymous surveys to a regular practice of mutual feedback in supervisory meetings. In fact, in the initial stages of addressing racial harm, leaders should be prepared to check-in regularly with updates on the process and follow-up whenever questions arise that they aren't able to answer immediately.

✓ **Practice generative conflict**

Organizations with a culture of accountability understand the difference between generative conflict, harm, and abuse. Most of us have been conditioned to avoid conflict or see it as a sign of failure. This fear and avoidance of conflict makes punishment all the more seductive. By punishing another person, we don't have to experience the messy vulnerability that conflict produces. We also don't have to account for the ways we've contributed to the breakdown in the relationship. Conflict—not harm or abuse—is a natural and necessary part of all relationships, including our professional ones. At work, team members don't avoid conflict or hide behind professional standards rooted in white supremacy that prioritize politeness and impassivity over being clear and direct. In a culture of accountability, teams understand that conflict can deepen trust and advance relationships rooted in mutuality, self-awareness, and repair (Anderson, 2021, para. 11 - 18).

WHAT ACCOUNTABILITY PRACTICES DOES YOUR ORGANIZATION USE OR PLAN TO?







A P P E N D I C E S

APPENDIX A: SAMPLE TEAM WORKPLAN*

*Adapted from "Strategic Planning Toolkit For Equity, Inclusion, and Diversity" (UCBerkeley, Division of Equity & Inclusion)

ACTION	PEOPLE	RESOURCES NEEDED
Step One: Map Out Planning Process		
Planning team infrastructure (Who?)		
Connect with personnel across the organization		
Review strategic plan		
Develop workplan with necessary collaborators and input		
Step Two: Gather Information and Self-Assessment		
Gather organization and departmental data		
Review data - track sources & possible future needs		
Develop self-assessment (See Appendix D)		
Conduct self-assessment and engage stakeholders		
Communicate findings and next steps to leadership.		
Revise workplan based on self-assessment results		
Check in with staff primarily engaging in IDEA work		
Step Three: Develop Vision (Goals, Strategies, Metrics, Implementation Plan)		
Study and synthesize results of work to date		
Finalize plans for visioning work and check in with personnel across the organization		
Re-engage with key stakeholders (See Appendix E)		
Draft goals, strategies, deliverables, metrics, implementation plan (See Appendix G, H & J)		
Ensure cross-organizational and stakeholder support; conduct review and revision process		
Finalize draft plan		
Step Four: Review Plan with Personnel, Clients, and Collaborators		
Review plan with all invested parties		
Collect feedback and adapt plan as necessary		
Step Five: Adopt Plan and Communicate Vision		
Conduct organizational process to adopt strategic plan		
Develop and launch communication plan (webpages, unit/staff meetings, newsletters, trainings)		
Step Six: Implement Plan		
Revisit implementation plan and revise as needed		
Plan regular check-points: with teams, with leadership, with stakeholders		
Continue to plan for resources needed		

APPENDIX B: CONTINUUM ON BECOMING A TRANSFORMATIVE ANTI-OPPRESSION ORGANIZATION

EXCLUSIONARY INSTITUTION

Intentionally and publicly excludes or segregates people of color, indigenous people, immigrants, women, LGBTQ people, poor and working class people, and/or disabled people.

Intentionally and publicly enforces oppressive belief systems throughout institution.

Institutionalization of oppression includes formal policies and practices, teachings, and decision making on all levels

Openly maintains the dominant group's power and privilege (white people, men, straight people, cisgender people, rich and middle class people, able bodied people).

TOKENIZING INSTITUTION

Tolerant of a limited number of "token" people from oppressed social groups so long as they have "proper" perspective and credentials.

May still secretly limit or exclude oppressed people in contradiction to public policies.

Often declares, "We don't have a problem" as a way to silence critiques of oppressive dynamics.

Continues to intentionally maintain dominant group's power and privilege through its formal policies and practices, teachings, and decision making on all levels of institutional life.

Monocultural norms, policies and procedures of dominant culture viewed as the "right" way.

Engages issues of diversity and social justice only on club member's terms and within their comfort zone.

COMPLIANCE INSTITUTION

Makes official policy pronouncements regarding commitments to "diversity."

Sees itself as "non-oppressive" institution with open doors to all people.

Sponsors "diversity trainings."

Carries out intentional inclusiveness efforts, recruiting "someone of color," "a LGBTQ person," "a disabled person," etc. on committees or office staff, but not those who "make waves."

Little or no change in culture, policies, and decision making.

Is still relatively unaware of continuing patterns of privilege, paternalism and control.

AFFIRMING INSTITUTION

Develops an analysis of systemic oppression.

Sponsors anti-oppression trainings and ongoing study on a range of topics.

New analysis of institutionalized power, privilege, and oppression.

Develops intentional identity as an "anti-oppressive" institution.

Begins integrating anti-oppression politics into organizational policies and governance documents.

Actively recruits and promotes members of groups have been historically denied access and opportunity to certain some sectors of the organization.

Begins to develop accountable relationships to oppressed communities.

Institutional structures and culture that maintain power and privilege critiqued but still intact and relatively untouched.

TRANSFORMING INSTITUTION

Commits to process of intentional institutional restructuring, based upon anti-oppression analysis and identity.

Audits and restructures all aspects of institutional life to ensure full participation of people of color, indigenous people, immigrants, poor and working class people, LGBTQ people, women, and disabled people including their worldview and cultures.

People more impacted by systemic oppression are involved in determining organizational structures and practices. Actively recruits, promotes, and retains members of oppressed groups to all areas of the organization.

Commits to struggle to dismantle oppression in the wider community, and builds clear lines of accountability to oppressed communities.

Implements structures, policies and practices with transparent decision making and power sharing on all levels of the institution.

TRANSFORMATIVE INSTITUTION

Future vision of an institution and wider community that has overcome systemic oppression. Institution's life reflects full participation and shared power with diverse racial, gender, and economic groups.

Members across all identity groups work in horizontal relationships to determine the organization's mission, structure, constituency, policies and practices.

Actively works in solidarity in larger communities (regional, national, global) to eliminate all forms of oppression.

Members across all identity groups are full participants in decisions that shape the institution.

A sense of restored community and mutual caring.

APPENDIX C: SOCIAL IDENTITY WORKSHEET

The purpose of this exercise is to map out different domains of your social identity (i.e., social group membership) and to reflect on how these domains intersect with one another to shape your life experiences. We are socialized into seeing oppressive social relations and structures (e.g., personal bias, social prejudice, institutional discrimination, inequitable social structures) based on social group memberships as natural and normal. As McIntosh (2003) describes her white privilege as, “an invisible package of unearned assets which I can count on cashing in each day, but about which I was ‘meant’ to remain oblivious” (p. 191), when we belong to a privileged social group, it is especially difficult to recognize our own privilege. Privilege is often unearned, unasked for, and invisible benefits and advantages available to members of the privileged group (Hardiman, Jackson, & Griffin, 2007).

The goal of this exercise is not to assess how privileged or marginalized you are. The exercise does not fully capture or define who you are, and doing so is not its goal, either. Almost all of us have some experiences of privilege and some of marginalization, and these experiences are relative to context. In addition, different social identities will be perceived more or less salient to yourself and others, influencing your worldviews and interpersonal interactions, and what becomes more or less salient depends on the context (Sensoy & DiAngelo, 2012; Tharp, 2012). For example, a white working-class male may experience marginalization in Canadian society because of his socio-economic class, but his socio-economic condition may be still privileged relative to another country setting. In another setting, his race may become a more salient aspect of his identity than class.

Moreover, it is important to be mindful of the intersectional nature of our social identities (Hardiman et al., 2007; Sensoy & DiAngelo, 2012). One aspect of our identity seldom acts independent of the other aspects. Rather, different aspects of our identity interrelate with one another to shape a unique experience for each of us. In other words, those who share one identity domain, such as all those who are male, do not necessarily experience male privilege in the same way or extent because of the other identity domains that they do not share.

Despite these complexities of our social identities, we need to begin with articulating and reflecting on implicit, as well as explicit, domains of our identity to understand how we are positioned in society and how it shapes our life experience.

INSTRUCTIONS

1. Write your identity in Column B corresponding to each identity domain in Column A.
2. In the top row on Column C, write the places where you live now (and lived as a child, if it is different from where you live now).
3. For each identity domain on Column B, consider if it puts you in a position of privilege or marginalization. Write “P” for privilege and “M” for marginalization on Column C.
4. Proceed to Reflection Questions.

APPENDIX C: REFLECTION QUESTIONS

1. Considering all your social identities listed in the table above, on a daily basis, which ones are you most aware or conscious of? You can pick more than one domain if you want.

- a) Most aware/conscious of:

- b) What do you appreciate about or gain from that identity?

- c) What is the most negative or difficult thing about that identity?

2. Considering all your social identities listed in the table above, on a daily basis, which ones are you least aware or conscious of? You can pick more than one domain if you want.

- a) Least aware/conscious of:

- b) What do you appreciate about or gain from that identity?

- c) What is the most negative or difficult thing about that identity?

3. What stood out most to you in this exercise? Why?

4. What would you like to know more about or explore further?

Note: These reflection questions were adopted from Diane J. Goodman (dianejgood@aol.com) and UBC Peer Program Training Modules: Diversity & Intercultural Communication 2008/09.

Time and Place at UBC: Our Histories and Relations - <http://timeandplace.ubc.ca/>

User Guide for Educators – Appendix 2 | Licensed under a Creative Commons Attribution-NonCommercial-ShareAlike 4.0 International License.

APPENDIX D: ORGANIZATIONAL DIVERSITY, INCLUSION AND EQUITY: SELF ASSESSMENT TOOL

Please rank the status of each of the following items on a scale of 0 to 3, according to the ratings shown below:

- 0 - Not yet started 1 - Beginning phase 2 - Well under-way 3 - Fully Developed (including monitoring/review procedures)
 N/A - Not Applicable/Don't know

Where appropriate, please add your comments to explain or illustrate your rating.

STANDARDS	MEASURES	STATUS	COMMENTS
A. GOVERNANCE			
1. POLICIES, GUIDELINES AND PRACTICES			
<p>Vision: The organization's commitment to creating an environment free of systemic and individual barriers to inclusion and equity is incorporated into the policies, guidelines and practices of the organization.</p>			
<p>1.1 The organization's commitment to diversity and inclusion is known and understood by all Board members, management, staff, volunteers, members and organizational affiliates.</p>	<p>1. The Board has made public their commitment to diversity, inclusion and equity.</p>		
	<p>2. Opportunities for the involvement of diverse segments of the population, as well as all members of the organization (Board, staff, volunteers) have been clearly defined in the development of organizational policies and strategies.</p>		
<p>1.2 Anti-discrimination and workplace harassment policies are in place, including principles and objectives of diversity, inclusion and equity in the areas of governance, programs, services and human resources management</p>	<p>1. The organization has incorporated the principles of diversity, inclusion and equity into its statement of values.</p>		
	<p>2. The organization allocates appropriate resources (staffing, time, financial) to the development and review of policies relating to diversity, inclusion and equity.</p>		
<p>1.3 Principles of diversity, inclusion and equity are embedded in all organizational policies and practices.</p>	<p>1. The organization has addressed issues of diversity and inclusion in its strategic plan.</p>		
	<p>2. The organization has assessed its existing policies, guidelines and practices to determine if they are congruent with the principles of diversity and inclusion.</p>		

ORGANIZATIONAL DIVERSITY, INCLUSION AND EQUITY: SELF ASSESSMENT TOOL

STANDARDS	MEASURES	STATUS	COMMENTS
<p>1.4 Mechanisms are established to monitor and measure progress towards achieving organizational change to reduce barriers to inclusion and equity.</p>	<p>1. The Board has explored the possibility of systemic barriers to inclusion existing in their governance and Board policies and practices.</p>		
	<p>2. The Board has formulated an action plan to eliminate barriers to inclusion.</p>		
LEADERSHIP			
<p>Vision: The organization's leaders' commitment to diversity, inclusion and equity is known within the organization and in the community and is reflected in the decision-making structures and processes of the organization.</p>			
<p>2.1 The Board and management provide informed leadership in the implementation of anti-discrimination and workplace harassment policies.</p>	<p>1. The Board has clearly outlined its expectations for management on the implementation of diversity, inclusion and equity policies.</p>		
	<p>2. The Board has clearly outlined its expectations for management on the implementation of workplace discrimination/harassment policies.</p>		
	<p>3. The Board has developed clear guidelines to follow if the policies are breached.</p>		
	<p>4. The Board and management have committed resources for the effective implementation of diversity, inclusion, equity and workplace discrimination/harassment policies and programs.</p>		

ORGANIZATIONAL DIVERSITY, INCLUSION AND EQUITY: SELF ASSESSMENT TOOL

INCLUSIVENESS OF PROCESS

Vision: The decision-making process is inclusive and reflects community needs and expectations.

<p>3.1 Information concerning governance structure and opportunities to serve are effectively communicated to members of diverse communities within the service area.</p>	<p>1. The organization has developed a communications strategy to inform diverse populations of its activities and invite them to participate.</p>		
	<p>2. The organization has developed a comprehensive list of community and ethnic media.</p>		
	<p>3. The organization has developed a comprehensive list of community, regional and provincial groups and organizations that deal directly with diverse and/or marginalized populations.</p>		
	<p>4. The organization has developed a comprehensive list of other points of access for reaching diverse communities (i.e. places of worship, community centres, social clubs etc.).</p>		
	<p>5. The organization has compiled and updated provincial and regional profiles including demographics and social, economic, health and environmental issues.</p>		
<p>3.2 Partnerships between community organizations and the organization are in place, reflect the diversity of the population, and are functioning well.</p>	<p>1. The organization has developed an effective and inclusive formal and informal working relationship with diverse community groups and organizations.</p>		
	<p>2. The organization has developed a two-way consultation mechanism with diverse communities.</p>		
	<p>3. Partnerships are actively sought with organizations representing diverse populations</p>		
	<p>4. Partnership agreements include a process for conflict resolution.</p>		

ORGANIZATIONAL DIVERSITY, INCLUSION AND EQUITY: SELF ASSESSMENT TOOL

	<p>1. The organization has explored the possibility of systemic barriers in the recruitment, selection and retention processes for Board, committees and senior management. (i.e. advertising outlets, criteria for selection, interview process, time/ financial requirements for participation)</p>		
	<p>2. The Board has explored the possibility of barriers existing in the way it and its committees function. (e.g. time and location of meetings, accessibility of building, availability of child/ elder care, meeting style)</p>		
	<p>3. Orientation and training are provided to members as needed to increase their ability to participate effectively.</p>		
	<p>4. Time is set aside in meetings for each member to express their perspective and concerns.</p>		
	<p>5. Ground rules have been determined which state how group members are to relate to one another.</p>		
	<p>6. Terms of reference for committees include a process for conflict resolution.</p>		
	<p>7. The organization has developed a plan to eliminate barriers and to enhance participation in the Board and committees.</p>		
	<p>1. The organization has developed a mechanism for effectively handling complaints of incidences of discrimination from organizational partners, affiliates, volunteers and community groups.</p> <p>2. The organization has developed a strategy to ensure that the Board, management, staff, organizational affiliates, volunteers and community groups are aware of their right to access the complaints procedure to address any incidence of discrimination.</p>		
<p>3.3 Members of diverse communities are equitably represented in the different levels of the organization, i.e. Board, committees and management.</p>			
<p>3.4 Effective mechanisms are in place to handle complaints about incidence of discrimination from organizational affiliates, volunteers and community groups.</p>			

ORGANIZATIONAL DIVERSITY, INCLUSION AND EQUITY: SELF ASSESSMENT TOOL

B. PROGRAMS & SERVICES			
1. SERVICE PLANNING Vision: Services are barrier-free and appropriate to the needs of diverse communities.			
1.1 Participation of diverse communities in the needs identification and planning of organizational programs and services is supported and encouraged.		1. Key members of diverse communities have been invited to participate in the planning of the organization's programs and services.	
		2. The organization has obtained information about the needs and interests of these diverse communities.	
2. SERVICE DELIVERY Vision: Programs and services are responsive to the values, norms and needs of diverse communities.			
2.1 Programs and services are adapted to take into account and accommodate the values, norms and issues of diverse communities.		1. Staff adapt programs and services to respond to identified needs and issues; e.g.: <ul style="list-style-type: none"> - Meals/ childcare/transportation - Respect for faith/spiritual practices - Meeting times, locations and structures - Services respond to expressed issues and needs 	
2.2 Appropriate linguistic resources are provided to ensure equitable utilization of organizational programs and services by the diverse communities.		1. The various linguistic groups have been identified within its service area.	
		2. The organization has developed an action plan with members of diverse communities to eliminate language barriers to accessing programs and services.	

ORGANIZATIONAL DIVERSITY, INCLUSION AND EQUITY: SELF ASSESSMENT TOOL

3. OUTREACH	
Vision: Diverse communities in the service area know of the organization's programs and services.	
<p>3.1 Effective, equitable and appropriate strategies are utilized to communicate programs and services with diverse communities within the service area.</p>	<p>1. An outreach strategy has been developed and appropriate resources allocated to reach the various communities in an equitable manner.</p>
	<p>2. A communication strategy has been developed to provide information to various communities within the service area, including:</p> <ul style="list-style-type: none"> - Targeted media (TV, audio/radio, print) - Community newspapers - Key informants - Community leaders
	<p>3. The organization has established a two-way communication mechanism with diverse communities in its service area.</p>
C. HUMAN RESOURCES	
1. STAFF RECRUITMENT/ RETENTION / PROMOTION	
Vision: All levels of staff reflect the diversity found in the province.	
<p>1.1 Staff, organizational affiliates and volunteers are reflective of the diverse communities in the broader community.</p>	<p>1. The organization has explored the possibility of barriers in the recruitment, hiring, promotion and retention of diverse staff, organizational affiliates and volunteers.</p>
	<p>2. Paid and volunteer opportunities have been advertised in non- mainstream media. (i.e. target media, community newspapers, newsletters of professional associations and community organizations).</p>
	<p>3. The organization has consulted with members of diverse communities regarding the development of the recruitment process.</p>
	<p>4. The organization has reviewed the interview process for biases, such as: diversity among their interviewers and bias-free questions.</p>

ORGANIZATIONAL DIVERSITY, INCLUSION AND EQUITY: SELF ASSESSMENT TOOL

	<p>5. Mentoring and conflict resolution systems have been put into place to ensure the retention of diverse staff, organizational affiliates and volunteers</p>		
<p>2. BOARD/ STAFF/ VOLUNTEER TRAINING Vision: All staff and volunteers are knowledgeable about how social, political, economic and cultural differences affect the ability of diverse groups to fully participate in their communities, and are skilled in working with diverse members of the community.</p>			
<p>2.1 All staff, Board members and volunteers are given opportunities to participate in diversity, inclusion and equity knowledge and skill development programs.</p>	<p>1. The knowledge and skills of its Board, management, staff and volunteers have been assessed in the areas of diversity, inclusion and equity.</p>		
	<p>2. The organization has developed a diversity, inclusion and equity education program, attended by all staff, Board members and volunteers.</p>		
	<p>3. The organization has involved members of diverse communities in the planning, delivery and evaluation of the diversity, inclusion and equity education program.</p>		
	<p>4. The organization keeps its resources current for staff, professionals and volunteers to update their knowledge and skills on appropriate service delivery to diverse communities.</p>		

ORGANIZATIONAL DIVERSITY, INCLUSION AND EQUITY: SELF ASSESSMENT TOOL

<p>3. PERFORMANCE APPRAISALS Vision: Improved staff, Board and volunteer performance promotes an environment free of all forms of discrimination, workplace harassment and barriers to inclusion and equity.</p>		
<p>3.1 Evaluation of management, staff and volunteers includes adherence to discrimination and workplace harassment prevention policies.</p>	<p>1. The organization has developed clear guidelines for staff to provide cross-cultural services within an inclusive framework.</p>	
	<p>2. Indicators of diversity and inclusion are included in the performance appraisal of staff.</p>	
	<p>3. Consideration is given to volunteers' contributions to promoting diversity, inclusion and equity during volunteer appraisals.</p>	
	<p>4. Indicators of diversity and inclusion are included in the performance appraisal of the Board of directors' functions.</p>	
<p>D. EVALUATION AND MONITORING</p>		
<p>Vision: The organization's programs and services are responsive to the needs of diverse communities.</p>		
<p>1.1 An evaluation plan is in place to monitor the accessibility, appropriateness and effectiveness of programs and services.</p>	<p>1. The organization has consulted with diverse communities in the development of an evaluation plan.</p>	
	<p>2. The organization has established an evaluation process to monitor the accessibility, appropriateness and effectiveness of programs and services to diverse communities.</p>	
<p>Additional Comments</p>		

APPENDIX E: STAKEHOLDER MAPPING

What is Stakeholder Mapping, and how will it help you?

Stakeholder Mapping is a tool used to analyze and prioritize the engagement of stakeholders when you are planning to implement an initiative. This tool will help you and your team generate information about stakeholders to understand their interests and assess their influence in order to successfully implement and sustain a new initiative.

Stakeholder mapping will help:

- Gain early buy-in of stakeholders on plans and goals
- Obtain input into the initiative design, its implementation, and integration
- Build understanding and manage stakeholder expectations

How to use this tool: (refer to worksheets on pages 3–5)

1. Outline the goals and objectives of your initiative and record them on the [Stakeholder Mapping Worksheet](#).

Identify key stakeholders for your initiative. Consider those individuals and organizations who may be interested in your initiative or can influence its implementation, either positively or negatively. Include both external and internal stakeholders. List stakeholders in the [Stakeholder Mapping Worksheet](#) on page 4.

Example: A Title X grantee is interested in implementing Screening, Brief Intervention, and Referral to Treatment (SBIRT) at its service sites. The grantee identifies administrators, providers, and staff as internal stakeholders. The Substance Abuse and Mental Health Administration (SAMHSA), the State Department of Health and Human Services (State DHHS), third-party payers, and their EHR vendor are identified as potential external stakeholders.

2. Gather information about each stakeholder to understand their key interests and the potential impact of your initiative on the stakeholder. Consider the following guiding questions.
 - a. How does successful completion of the initiative benefit the stakeholder? Does the initiative have any negative consequences for the stakeholder?
 - b. What could be the stakeholder's expectations for this initiative?

List the potential interests of all the stakeholders in the [Stakeholder Mapping Worksheet](#). Decide if the level of interest of each stakeholder is high or low and record.

Example: The State DHHS has announced Substance Use Prevention and Recovery grant funds available for local agencies. To achieve targets, the State DHHS would have a high interest in SBIRT implementation.

3. Determine the level of influence of each stakeholder to control key decisions related to the initiative. Decide if the level of influence of each stakeholder is high or low. Consider the following guiding questions.
 - a. What is the stakeholder's current role? How can the stakeholder impact the initiative under consideration?
 - b. Is the stakeholder supportive or critical of the family planning or proposed initiative?
 - c. Would the stakeholder control decisions related to the initiative and its implementation processes?

Record the level of influence of each stakeholder in the [Stakeholder Mapping Worksheet](#).

Example: The administrators at the service site would have a high influence on SBIRT implementation. They are likely to control key decisions and have a strong ability to facilitate the implementation of tasks and encourage others to take action.

4. Prioritize stakeholder engagement by determining where each stakeholder is located on the Influence/Interest Matrix. The matrix helps to identify the key stakeholders critical to your efforts and level of engagement that needs to be established and maintained with each stakeholder.

- Stakeholders with **high interest and high influence** are the major contributors and need to be engaged at the onset of the initiative (**high engagement**).
- Stakeholders with **low interest and low influence** will require minimum effort (**low engagement**).
- Stakeholders with **high interest and low influence** or power will need to be kept fully informed of major decisions (**moderate engagement**).
- Stakeholders with **low interest and high influence** need to be kept satisfied, even though they are not interested because they yield power (**moderate engagement**).

		INTEREST	
		Low	High
INFLUENCE/POWER	Low	Low Engagement (Minimal effort) Example: general public	Moderate Engagement (Keep Informed) Example: service providers, administrative staff (billing and coding), EHR vendor
	High	Moderate Engagement (Keep satisfied) Example: third-party payers	High Engagement (Key Player) Example: administrators, funding agencies

Example of prioritization of stakeholders for SBIRT implementation

After mapping the stakeholders on the Influence/Interest Matrix, record the priority of engagement for each stakeholder (high (key players), moderate (keep informed), moderate (keep satisfied), and low (minimal effort)) on the **Stakeholder Mapping Worksheet**.

5. Specify stakeholder roles in the project to establish stakeholder expectations. Speak to stakeholders to understand their potential roles. List stakeholder potential role(s) on the Stakeholder Mapping Worksheet.

Example: A Title X grantee determines that training resources available on the SAMHSA website will be used to train relevant staff and providers on SBIRT implementation and coding for reimbursement.

6. Determine when to engage each stakeholder, based on the priority and type of engagement. Decide whether you want to engage a stakeholder early on during the planning or the implementation phase. Record the phase in which each stakeholder must be engaged on the **Stakeholder Mapping Worksheet**.

Example: A Title X grantee determines that the administrators at the service site will eventually oversee (control) the implementation of SBIRT, hence needs to be engaged during the exploration phase to secure their buy-in and commitment.

7. The next step is to develop a communication plan to engage the prioritized stakeholders. A carefully used communication plan validates how stakeholders are included in the implementation of initiatives. Use the **Communication Plan Worksheet** on page 5.

Example: The grantee decides to engage service site administrators biweekly to discuss the implementation plan for SBIRT.

SAMPLE STAKEHOLDER MAPPING WORKSHEET

Project under consideration: SBIRT Implementing Agency: XYZ

Project goals: The main goal for SBIRT is to improve community health by reducing the prevalence of adverse consequences of substance misuse, including SUDs, through early intervention and, when needed, referral to treatment (IOM 1990).

STAKEHOLDER NAME & STATUS (Internal/ External)	NAME OF CONTACT PERSON (Title)	KEY INTERESTS [the effect of project implementation and outcomes on the stakeholders]	LEVEL OF INTEREST (High/Low) [the interest of stakeholders in key decisions related to the project]	LEVEL OF INFLUENCE (High/Low) [the power of stakeholders to control key decisions related to the project]	PRIORITY OF ENGAGEMENT [High (Key players), Moderate (keep informed), Moderate (keep satisfied), Low (minimal effort)]	ROLE	PHASE OF ENGAGEMENT (during planning, and/or during implementation)
SAMHSA (external)		-Achieve key federal target -Training and technical assistance	High	High	High (Key Players)	-Informs standards of practice -Training provider	Planning
State DHHS (external)		-Achieve key state targets -Fund substance use prevention and recovery initiatives	High	High	High (Key Players)	Primary Funding Agency	Planning and then as per reporting requirement for the grant
Service site administrators (Internal)		-Achieve project targets -Return on investment -Expansion of organization portfolio -Increase in clients served	High	High	High (Key Players)	Oversee SBIRT Implementation	Planning and implementation
Providers and staff (Internal)		-Expand skill level -Time to provide SBIRT -Comfort with SBIRT	High	Low	Moderate (Keep informed)	Program Implementers	Planning and implementation
Third-party payers (external)		-Reimbursement for SBIRT	Low	High	Moderate (Keep Satisfied)	Informs billing and coding for SBIRT	Planning and implementation

STAKEHOLDER MAPPING WORKSHEET

Project under consideration:

Implementing Agency:

Project goals:

STAKEHOLDER NAME & STATUS (Internal/ External)	NAME OF CONTACT PERSON (Title)	KEY INTERESTS [the effect of project implementation and outcomes on the stakeholders]	LEVEL OF INTEREST (High/Low) [the interest of stakeholders in key decisions related to the project]	LEVEL OF INFLUENCE (High/Low) [the power of stakeholders to control key decisions related to the project]	PRIORITY OF ENGAGEMENT [High (Key players), Moderate (keep informed), Moderate (keep satisfied), Low (minimal effort)]	ROLE	PHASE OF ENGAGEMENT (during planning, and/or during implementation)

COMMUNICATION PLAN WORKSHEET

Who is the stakeholder?	What information or message needs to be shared?	What is the modality of sharing the information?	How often do we share the information?	Who is responsible for sharing the information?
Example: service site administrators	implementation plan for SBIRT	In-person meeting or conference call?	bi-weekly	The coordinator is responsible for scheduling the meeting, and the Title X grantee director implementation plan and seeking input.

References:

1. Varvasovszky, Z., & Brugha, R. (2000). How to do (or not to do). A stakeholder analysis. *Health Policy And Planning*, 15(3), 338–345.
2. Smith, L. W. (2000). Stakeholder analysis: a pivotal practice of successful projects. Paper presented at Project Management Institute Annual Seminars & Symposium, Houston, TX. Newtown Square, PA: Project Management Institute.
3. Singh, M., Gmyrek, A., Hernandez, A., Damon, D., & Hayashi, S. (2017). Sustaining Screening, Brief Intervention and Referral to Treatment (SBIRT) services in health-care settings. *Addiction*, 112, 92–100. doi: 10.1111/add.13654
4. Newcombe, R. (2003). From client to project stakeholders: a stakeholder mapping approach. *Construction Management and Economics*, 21(8), 841–848. doi: 10.1080/0144619032000

APPENDIX F: LIST OF VALUES

Acceptance	Bliss	Contribution
Accomplishment	Boldness	Control
Accountability	Bravery	Conviction
Accuracy	Brilliance	Cooperation
Achievement	Calmness	Courage
Adaptability	Candor	Courteousness
Adventurousness	Capability	Craftiness
Agreeableness	Carefulness	Creativity
Alertness	Caring	Credibility
Altruism	Cautiousness	Curiosity
Ambition	Certainty	Daringness
Amiability	Challenge	Decency
Amusement	Charisma	Decisiveness
Amusingness	Charity	Dedication
Appreciativeness	Charm	Deep thought
Art	Cheerfulness	Democracy
Articulateness	Citizenship	Dependability
Assertiveness	Clarity	Determination
Athleticism	Cleanliness	Devotion
Attentiveness	Clear-headedness	Dignity
Authenticity	Cleverness	Diligence
Awe	Comfort	Discipline
Balance	Commitment	Discovery
Beauty	Common sense	Diversity
Being admirable	Communication	Drive
Being dynamic	Community	Dualism
Being earnest	Compassion	Dutifulness
Being famous	Competence	Easygoingness
Being folksy	Complexity	Education
Being frank	Confidence	Effectiveness
Being methodical	Connection	Efficiency
Being personable	Conscientiousness	Elegance
Being reasonable	Conservativeness	Eloquence
Being skilled	Consideration	Emotional awareness
Being thoughtful	Consistency	Emotional control
Being understanding	Constructiveness	Empathy
Benevolence	Contemplation	Empowerment
Big-thinking	Contentment	Endurance

LIST OF VALUES CONTINUED

Energy	Graciousness	Life experience
Enjoyment Enthusiasm	Gratitude	Likability
Equality	Greatness	Logic
Ethics	Growth	Love
Excellence	Happiness	Loyalty
Excitement	Hard work	Mastery
Expedience	Harmony	Maturity
Experimenting	Health	Mellowness
Exploration	Helpfulness	Moderation
Expressiveness	Heroicness	Modesty
Extraordinary experiences	Honesty	Motivation
Fairness	Honor	Neatness
Faith	Hope	Neutrality
Faithfulness	Humbleness	Newness
Family Farsightedness	Humility	Niceness
Fashion	Humor	Objectivity
Feelings	Idealism	Open-mindedness
Fidelity	Imagination	Openness
Flair	Incisiveness	Optimism
Flexibility	Independence	Order
Focus	Individualism	Organization
Foresight	Individuality	Originality
Forgiving	Influence	Passion
Forthrightness	Innovation	Patience
Fortitude	Insightfulness	Patriotism
Freedom	Inspiration	Peace
Freethinking	Integrity	Peacefulness
Friendliness	Intelligence	Performance
Friendship	Intensity	Perseverance
Fun	Intuitiveness	Persistence
Fun-loving attitude	Inventiveness	Playfulness
Generosity	Joy	Pleasure
Gentleness	Justice	Poise
Genuineness	Kindness	Positive attitude
Giving	Knowledge	Positivity
Glamorousness	Lawfulness Leadership	Potential
Good-nature	Learning	Power
Goodness	Liberty	Practicality
Grace	Life direction	

Source: Berkeley Well-Being Institute "List of values"

LIST OF VALUES CONTINUED

Preciseness	Smarts
Principles	Sociability
Productivity	Social connection
Professionalism	Sophistication
Prosperity	Speed
Protection	Spirituality
Punctuality	Spontaneity
Purpose	Stability
Quality	Status
Rationality	Steadiness
Realism	Strength
Recognition	Structure
Recreation	Studiosness
Reflection	Success
Relaxation	Sweetness
Reliability	Sympathy
Resourcefulness	Teamwork
Respect	Tenderness
Respect for others	Thoroughness
Responsibility	Tidiness
Restraint	Timeliness
Results-oriented	Tolerance
Rigor	Tradition
Risk	Tranquility
Romance	Transformation
Satisfaction	Trust
Security	Truth
Self-awareness	Unity
Self-improvement	Variety
Self-reliance	Vivaciousness
Self-respect	Warmth
Self-sufficiency	Wealth
Selflessness	Well-roundedness
Sensitivity	Wisdom
Serenity	Wit
Service	
Simplicity	

APPENDIX G: PRIORITIES, GOALS, AND ACTIONS ALIGNMENT WORKSHEET

For each priority area, fill out the following:

Goal, Stated as a Desired Outcome. Be Specific! What is it that you want to achieve?
Measure: What would be the observable signs of success? Get very concrete about how you will know you've reached the goal.

Date: By when do you intend to accomplish this? Give yourself a time goal to ensure action. What, if anything, seems impossible about this? Acknowledge the fears, risks, or barriers to achieving your goal. Then you can plan steps to overcome those obstacles.

What outcome would exceed your expectations, and surprise and delight you? The biggest goals often yield the strongest motivation and action! Dream big and capture it to help drive bold enough action planning.

Generate Ideas and Plans: Brainstorm a list of 12 or more ideas or actions for each goal. Choose 1 to take action on for each goal. NOTE: Include wild and "impossible" ideas! Make sure your list includes at least one idea that would never work and another that you consider ridiculous; this way you can be certain you are not self-censoring your brainstorming.

Act on the ideas, record progress, and assess your path: Sit down periodically (at least every other week) to review your Implementation Plan (Appendix I) and note your status through the task list. If you find yourself not making progress, ask yourself what's in the way. Have you set the wrong priorities? Are your goals not compelling enough to lead you to act consistently? Adjust your priorities, goals, and actions as needed.

Develop the habit of keeping yourself focused on what's most important!

What Time-frame Does This Cover?

**Week | Month | 3 Months
6 Months | Year | Several Years**

Priorities – List current goals, challenges, and issues, areas of concern or opportunities in order of decreasing priority to you related to improving IDEA efforts.

NOTE: Priority can be thought of as a combination of importance and urgency. To decide which are your top priorities, first list all of them and then decide where you want to focus most of your energy. Then choose where you would focus next if #1 were on track.

PRIORITIES, GOALS, AND ACTIONS ALIGNMENT WORKSHEET

Measure:

What would be the observable signs of success?

Date:

When do you intend for this to be accomplished?

What, if anything, seems impossible about this?

What outcome would exceed your expectations, and surprise and delight you?

Examples

In 3 months, create a new IDEA committee to be catalytic, to support staff and community stakeholders.

By the end of 2023, create and maintain identity specific affinity spaces.

Increase representation of people of color on the board and in staff make-up by 25% in the next year.

Convene quarterly events, workshops, celebrations, community building opportunities with organization personnel, clients, and identified community partners.

1.

2.

3.

4.

APPENDIX H: S.M.A.R.T. GOALS WORKSHEET

Crafting S.M.A.R.T. Goals are designed to help you identify if what you want to achieve is realistic and determine a deadline. When writing S.M.A.R.T. Goals use concise language, but include relevant information. These are designed to help you succeed, so be positive when answering the questions.

<p>INITIAL GOAL</p>	<p>Write the goal you have in mind.</p>
<p>S</p> <p>SPECIFIC</p>	<p>What do you want to accomplish? Who needs to be included? When do you want to do this? Why is this a goal?</p>
<p>M</p> <p>MEASURABLE</p>	<p>How can you measure progress and know if you've successfully met your goal?</p>
<p>A</p> <p>ACHIEVABLE</p>	<p>Do you have the skills required to achieve the goal? If not, can you obtain them? What is the motivation for this goal? Is the amount of effort required on par with what the goal will achieve?</p>
<p>R</p> <p>RELEVANT</p>	<p>Why am I setting this goal now? Is it aligned with overall objectives?</p>
<p>T</p> <p>TIME-BOUND</p>	<p>What's the deadline and is it realistic?</p>
<p>SMART</p>	<p>Review what you have written, and craft a new goal statement based on what the answers to the questions above have revealed.</p>
<p>GOAL</p>	

Source: Smartsheet

APPENDIX I: THE DIVERSITY, EQUITY AND INCLUSION (DEI) METRICS INVENTORY

Overview: This tool is a compilation of metrics collected by organizations to demonstrate DEI outcomes and progress. It is designed to help you and your teams better assess the metrics you track and report for different audiences in your organization.

Audience

Questions to Consider:

- If you do not track all the metrics listed below, which of the categories would you prioritize based on your DEI strategy?
- How would you adapt these metrics to best demonstrate current DEI progress?
- How would you adapt these metrics to best highlight organizational needs for DEI improvements?
- Which of these metrics will help you form a compelling narrative for key stakeholders about DEI progress?

DEI AND HR FUNCTION	WORKFORCE	LEADERS	RESOURCE GROUPS	ENTERPRISEWIDE
<p>Headcount and Budget</p> <ul style="list-style-type: none"> • Increased FTEs in the DEI function • Increased total budget for the DEI function • Percentage of budget allocated to specific activities (e.g., resource groups) • Number of regions covered by the DEI team <p>Government Requirements (e.g., EEOC in U.S.)</p> <ul style="list-style-type: none"> • Number of EEOC- or DEI-related complaints filed against the company (in U.S.) • Percentage of achievement of government-mandated diversity statistics <p>Learning and Development</p> <ul style="list-style-type: none"> • Percentage of training canon evaluated for DEI-related components <p>Recruiting Metrics</p> <ul style="list-style-type: none"> • Percentage of diverse candidates in total pool • Percentage of diverse candidates receiving interviews • Percentage of diverse candidates extended offers • Percentage of offer acceptance from diverse candidates • Percentage of compliance with diverse candidate slate requirements <p>Sourcing Channels</p> <ul style="list-style-type: none"> • Number of partnerships with diverse talent organizations (e.g., Black Engineers of America) <p>Talent Management</p> <ul style="list-style-type: none"> • Percentage of business units conducting talent reviews with DEI-specific questions or components 	<p>Representation</p> <ul style="list-style-type: none"> • Percentage of diverse talent out of total workforce representation • Percentage of diverse talent out of total senior leader representation • Percentage of diverse talent out of total board representation <p>Internal Talent Mobility</p> <ul style="list-style-type: none"> • Increase in diverse workforce promotions • Increase in diverse senior leader promotions • Increase in resource group leader promotions • Increase in diverse successor slates • Increase in diverse internal candidates for open roles <p>Employee Engagement or DEI Index Scores</p> <ul style="list-style-type: none"> • Increase in employee engagement scores • Increase in employees agreeing the organization is a place that values DEI • Increase in Net Promoter Scores • Increase in an index from employee survey (e.g., Gartner Inclusion Index) <p>Turnover</p> <ul style="list-style-type: none"> • Decrease in diverse employees/senior leaders with less than two years' tenure • Decrease in diverse employees/senior leaders with more than two years' tenure • Decrease in voluntary/involuntary turnover for diverse talent <p>DEI Training</p> <ul style="list-style-type: none"> • Percentage of employees participating in DEI-specific training • Percentage of managers participating in DEI-specific training • Scores or ratings of trainings • Number of DEI-specific training courses offered <p>Compensation</p> <ul style="list-style-type: none"> • Pay gap audit conducted • Percentage of employees needing pay adjustments • Amount spent conducting pay adjustments 	<p>Mentorship Programs</p> <ul style="list-style-type: none"> • Percentage of managers involved with mentoring programs • Percentage of senior leaders involved with mentoring programs <p>Executive Diversity Council</p> <ul style="list-style-type: none"> • Percentage of senior leaders participating on the council <p>Regional Diversity Council</p> <ul style="list-style-type: none"> • Percentage of regions with a DEI council • Percentage of regional leaders participating in a DEI council <p>DEI Training</p> <ul style="list-style-type: none"> • Percentage of leaders participating in DEI-specific training <p>Resource Group</p> <ul style="list-style-type: none"> • Percentage of leaders sponsoring a resource group <p>Events</p> <ul style="list-style-type: none"> • Number of DEI-specific events attended <p>Performance</p> <ul style="list-style-type: none"> • Percentage of leaders achieving DEI-specific MBOs or KPIs <p>Performance Management</p> <ul style="list-style-type: none"> • Percentage of leaders achieving DEI MBOs or KPIs across the firm 	<p>Participation</p> <ul style="list-style-type: none"> • Percentage of organizational participation in resource groups • Number of employees in one resource group • Number of employees in two resource groups • Number of employees in three or more resource groups • Number of DEI-specific events hosted <p>Funding</p> <ul style="list-style-type: none"> • Percentage of organizational funding spent on resource groups <p>Community Impact</p> <ul style="list-style-type: none"> • Number of community partnerships established • Amount spent with or donated to community organizations through resource group efforts <p>Business Impact</p> <ul style="list-style-type: none"> • Amount generated from resource group efforts • Number of business unit partnerships <p>Talent Outcomes</p> <ul style="list-style-type: none"> • Decreased attrition for participants • Decreased attrition for leaders • Increased promotion of participants • Increased promotion of leaders • Increased performance scores of participants • Increased performance scores of leaders • Increased engagement scores of participants • Increased engagement scores of leaders 	<p>Inclusive Policies</p> <ul style="list-style-type: none"> • Increase in number of inclusive policies • Increase in demographic coverage of existing policies (e.g., transgender rights, parental leave for adoptions) • Increase in geographic coverage of policies <p>Thought Leadership</p> <ul style="list-style-type: none"> • Number of white papers or articles released • Number of citations in trade journals or news publications • Citations or awards as a "best of" DEI company • Citations or awards from diverse talent organizations or publications <p>Supplier Diversity</p> <ul style="list-style-type: none"> • Supplier diversity policy in place or improved from previous year • Percentage of business going to suppliers that support diversity • Amount spent with suppliers that support diversity <p>Philanthropic and Community Efforts</p> <ul style="list-style-type: none"> • Amount spent or donated to philanthropic causes • Amount spent with organizations that have an explicitly DEI-driven mission statement • Employee hours spent in the community • Percentage of partnerships with organizations that have an explicitly DEI-driven mission statement <p>Customer Strategies</p> <ul style="list-style-type: none"> • Number of DEI-specific product development or marketing efforts • Amount generated from market expansion to diverse customer segments • Number of business units adopting DEI-specific market efforts <p>Communications</p> <ul style="list-style-type: none"> • Visits to external DEI site • Visits to internal/intranet DEI site • Number of DEI-related social media posts • Impact of DEI-related social media posts

APPENDIX J: ACTION PLAN GUIDE

GOAL 1	Action Step Descriptions	Party / Dept Responsible	Date to Begin	Date Due
Write your goal statement here				
List Resources & Desired Outcomes				
GOAL 2	Action Step Descriptions	Party / Dept Responsible	Date to Begin	Date Due
Write your goal statement here				
List Resources & Desired Outcomes				
GOAL 2	Action Step Descriptions	Party / Dept Responsible	Date to Begin	Date Due
Write your goal statement here				
List Resources & Desired Outcomes				
GOAL 3	Action Step Descriptions	Party / Dept Responsible	Date to Begin	Date Due
Write your goal statement here				
List Resources & Desired Outcomes				
GOAL 4	Action Step Descriptions	Party / Dept Responsible	Date to Begin	Date Due
Write your goal statement here				
List Resources & Desired Outcomes				

APPENDIX K: TIMELINE & BENCHMARKS

Pre-Institute

Pre-Institute Assessment
[December 2022]

Exploratory Learning
[January 9-23, 2023]

IDEA Institute

Welcome Session
[January 12, 2023]

Day 1: IDEA Foundations
[January 17, 2023]

Day 2: History & Frameworks
[January 18, 2023]

Day 3: Values & Priorities
[January 19, 2023]

Post-Institute

Progress Sessions [3]
[March/April/May 2023]

Technical Assistance Sessions
[10 hours available]
[March/April/May 2023]

Goals & Timeline Solidified
[End of February]

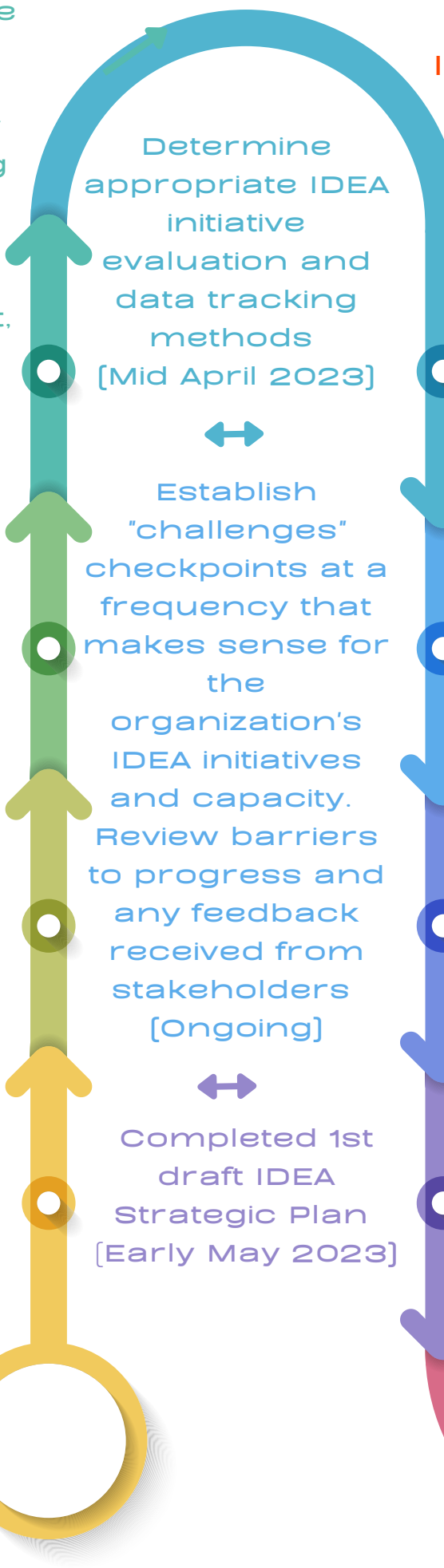
Tools to actualize the plan: revisit infrastructure needs/capacity identified during IDEA Institute.

Confirm investments. Budget, request, support as necessary [End of March 2023]

Outreach to stakeholders with concrete ask/points of collaboration/types of labor expected [End of March]

Stakeholder partnership parameters identified [Mid March]

Lanch planning [Early March]



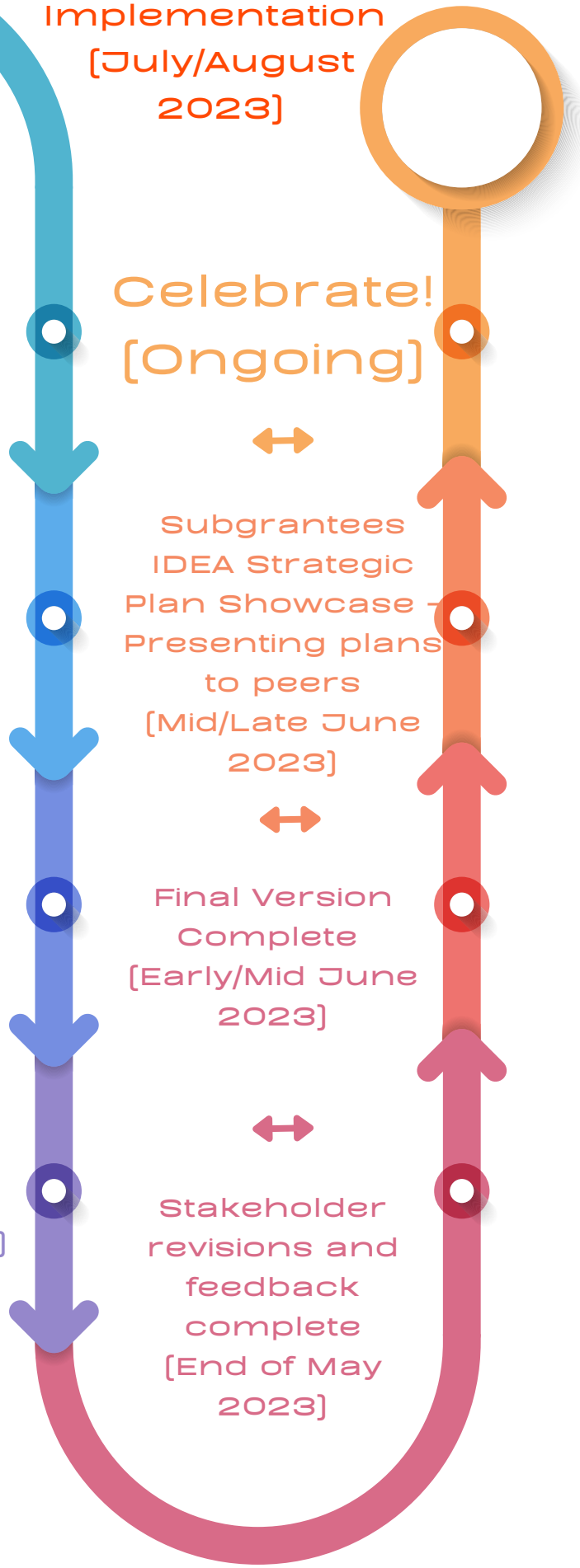
Roll out Plan Implementation [July/August 2023]

Celebrate! [Ongoing]

Subgrantees IDEA Strategic Plan Showcase - Presenting plans to peers [Mid/Late June 2023]

Final Version Complete [Early/Mid June 2023]

Stakeholder revisions and feedback complete [End of May 2023]





I M A G E

D E S C R I P T I O N S



Image Descriptions by Section & Page [Alternative (Alt) Text]

Overview & Objectives

VENN DIAGRAM (Page 5)

A venn diagram with four circles. The blue circle is liberation, yellow circle is victim services, purple circle is anti-oppression, and pink circle is IDEA. Each circle overlaps with the ones next to it and with all the other circles in the middle.

Section 1: Anti-Oppression Frameworks

FACES (PAGE 10)

Four AI art generated faces, side-by-side. Various skin tones.

OPPRESSION OPERATIONALIZED (PAGE 14)

At the top of the image a black circle states “unequal power and privileges between people based on their social group membership.” Smaller gray circles branch off from the black circle. From left to right the circles say: Ageism (based on age), Ableism (based on ability or disability), Racism (based on race or ethnicity), Sexism (based on sex or gender), Heterosexism (based on sexual orientation), Xenophobia (based on immigrant status), Religious Intolerance (based on religion), Classism (Based on income, education, family). Underneath the smaller circles are three gray boxes. From left to right the boxes say: Interpersonal (e.g. attitudes, statements, behaviors), Institutional (laws, organizational practices, policies, cultural norms, standards, assumptions), Internalized (e.g. feelings of shame, embarrassment and inferiority for being part of social group). Each of the three gray boxes point to a black circle at the bottom of the image. The black circle at the bottom says: Harmful Outcomes (e.g. physical and mental health, education, quality of life, income). To the left of the circle the image says: All types of oppression can exist and operate in all levels of oppression. To the right of the circle the image says: All types of oppression in all levels can manifest intentionally or unintentionally, consciously or unconsciously, and overtly or covertly. (David, & Derthick, 2017).

DOMESTIC VIOLENCE EVIDENCE PROJECT, THEORY OF CHANGE (PAGE 16)

At the far left a box lists “Common Elements of Program Components” as 1. Provide information (about rights options, domestic violence, trauma, sociopolitical setting). 2. Safety Plan. 3. Build skills (e.g. coping, emotional regulation, problem solving, parenting, resource attainment) 4. Offer encouragement, empathy and respect 5. Supportive counseling 6. Increase access to community resources and opportunities 7. Increase social support and community connections 8. Community change and systems change work. At the bottom of the box on the left the image says “programs conduct all their work in collaboration with other community members and policy makers.” The box on the left points to two boxes on its right. The box on the top says: “Intrapersonal Changes: Cognitive and behavioral changes: increased knowledge, skills, critical consciousness. Emotional Changes: sense of self, reduced distress. The box on the bottom says: Interpersonal and social changes: increased access to community resources, strong mother-child bond, effective interpersonal coping strategies, increased support, community connections, enhanced justice. The box labeled “Intrapersonal changes” points to a box on its right. This box says: Intrapersonal Predictors of Well Being: Self efficacy, hopefulness. Under this is a box that says: Interpersonal and Social Predictors of Well Being: Social connectedness, positive relationships with others, adequate social and economic opportunities, safety, positive physical, emotional, and spiritual. On the far right of the image is a box that says “Social and Emotional Well Being. At the bottom of the image under all the boxes it says “Important Contextual Factors Impacting Work and Success.

FROM: Sullivan, C.M. (2012, updated January 2016). Examining the Work of Domestic Violence Programs Within a “Social and Emotional Well-Being Promotion” Conceptual Framework, Harrisburg, PA: National Resource Center on Domestic Violence at www.dvevidenceproject.org.

THE LENS OF OPPRESSION (PAGE 18)

A venn diagram of two circles examines the lens of systemic oppression. On the left is a red circle labeled “Individual”. In the middle of this circle it says: Individual: A person’s beliefs and actions that serve to perpetuate oppression: conscious and unconscious, externalized and internalized. On the right is an orange circle labeled “Systemic”. In the middle of the circle it says: Institutional: Policies and practices at the organization (or “sector) level that perpetuate oppression. Structural: How these effects interact and accumulate across institutions—and across history. In the middle of the venn diagram where the two circles overlap it says: Interpersonal: The interactions between people—both within and across difference. (National Equity Project, n.d.)

THE SASHA MODEL: BLACK WOMEN'S TRIANGULATION OF RAPE DIAGRAM (PAGE 19)

A pyramid is split in half and broken up into four levels. The bottom left level is “Denying Resources: Policy driven rules, Gatekeepers creating loopholes, unemployment, government assistance, low income.” The second level on the left says: “Objectification: Black women are only depicted as cooks and maids, biased advertising, Sarah Baartman, Asexual, Unattractive, should just be happy to be alive.” The third level on the left says: “Stereotyping: Hypersexual, Mammy, Tragic Mulatto, Sapphire, Jezebel, we WANT sex more than other races at any cost, Black women are always angry.” The top level on the left says: “Devaluing: Denial of the experience, our mere experiences are invalidated, presumed incompetent, intra-racism, internal oppression, racial loyalty to a fault.” The bottom right level says: “Systemic Barriers: Untested rape kits, inadequate court systems, police brutality against black men, legacy of slavery and Jim Crow.” The second level on the right says: “Cultural Appropriation: Sexualizing our cultural expressions (dance, fast children, making our children provocative), Music and media industry, Post Traumatic Slave Syndrome.” The third level on the right says: “Over-Sexualizing: Misogyny, Misogynoir, placing lesser value on sex workers and normalizing sex work as the only valid and viable career.” The top level on the right says: “De-humanizing: Silence, invisibility, microaggressions, assaults, homophobia and heterosexism, denial of humanity to the LGBTQI community.” A circle is drawn around the pyramid and labeled at points. The very top says “policies and funding,” top right “rape culture,” right “societal barriers, bottom right “systemic barriers,” bottom “Oppression, Slavery, Institution,” bottom left “Demoralization/Exploitation,” left “Racism Bigotry,” top left “Victim Blaming”

POWER AND MARGINALIZATION WHEEL (PAGE 21)

A colorful circle indicates social identities and positions, relationships of power and marginalization, and social processes of discrimination, oppression, privilege and power.

Around the edge of the circle, there is a list of social processes. These include ageism, ableism, ethnocentrism, transphobia, xenophobia, classism, colonialism, racism, sexism, homophobia, and heterosexism. Within the circle, social identities and positions are arranged in three concentric rings. The outermost ring lists sixteen social identities and positions. These include age, culture, disability, education, ethnicity, geography, gender, immigration status, income, indigeneity, language, marital status, race, religion, sex, and sexual orientation. Moving inwards, the second ring lists sixteen categories that fall under the social identities and positions described in the outermost ring. These categories are typically more marginalized in society. A text box along the edge of this second ring reads “Marginalized.” The innermost ring lists sixteen categories that again fall under the social identities and positions described in the outermost ring. This time, the categories listed are ones typically associated with power in society. At the center of the circle, a text box reads “Power.”

Thus, the sixteen portions of the circle can be broken down as follows:

- Age: Older adults, youth (marginalized ring), middle-aged (power ring)
- Culture: Non-Western (marginalized ring), Western (power ring)
- Disability: Disabled (marginalized ring), able-bodied (power ring)
- Education: No formal education (marginalized ring), post-secondary (power ring)
- Geography: Rural (marginalized ring), urban (power ring)
- Gender: Trans and nonbinary (marginalized ring), cis-woman (middle ring), cis-man (power ring)
- Immigration status: Immigrant (marginalized ring), citizen (power ring)
- Income: Low (marginalized ring), high (power ring)
- Indigeneity: Indigenous Peoples (marginalized ring), settler (power ring)
- Language: English and French (marginalized ring), Other languages (power ring)
- Marital status: Widowed, divorced, single (marginalized ring), married (power ring)
- Race: Racialized (marginalized ring), white (power ring)
- Religion: Non-Christian (marginalized ring), Christian (power ring)
- Sex: Intersex (marginalized ring), female (middle ring), male (power ring)
- Sexual orientation: LGBTQ+ (marginalized ring), straight (power ring)

Below the circle, an arrow goes from the “Trans and nonbinary” text in the gender portion to a text box that reads: “Some gender identity terms include: agender, bigender, genderfluid, genderqueer, gender neutral, non-binary, transgender man, transgender woman.”

The image and alternative text taken from Bauer(2021) was adapted from Sylvia Duckworth’s Wheel of Power/Privilege.

COLORFUL ABSTRACT FACES (PAGE 24)

Several abstract AI art generated faces of multiple hues and colors overlap to form a collage.

Section 2: Mission & Diversity Statement

ABSTRACT FACE (PAGE 26)

Three collaged sections make up an abstract AI art generated face.

Section 3: Where Are We? Assessing the Present

FACE PROFILES (PAGE 28)

Four AI generated face profiles lined up next to each other with a line delineating between each. Various skin shades.

Section 4: Where Are We Going? The Path Forward

PATH THROUGH FOREST (PAGE 32)

A dirt path trailing off into the distance through a forest with light brown trees and green grass.

HEAD PROFILE (PAGE 33)

Human head profile filled with gray gears.

MAP WITH RED LOCATION PIN (PAGE 34)

An image of a street map with a red location pin.

COMMUNITY RESOURCE MAPPING, SURVIVORS OF INTERPERSONAL VIOLENCE IN THE PEEL REGION 2018 (PAGE 36)

A colorful image of doodles of different points in peoples lives and interactions with their communities. At the top of the image is the label “Community Resource Mapping. The doodles include farm silos, computers, dart board, clip board, hospital, judge’s gavel, shelters, pocket watch, police officer, magnifying glass, two hands shaking, and scientific imagery such as a chemistry beaker and a diagrammed cell. The text include words related to community services in the community of Peel such as: “shelter, financial services, assessment, transitional housing, equity, data, stakeholder analysis, police, health care services, employment, counseling, mental health, gap analysis,” and the phrase “turning partnerships, formal and informal, into data to develop evidence-based approaches.”

CORK BOARD WITH WHITE NOTE CARDS WITH VALUE RELATED WORDS (PAGE 43)

Partial image of a cork board with white note cards with various words related to values on them, pinned to the board.

Section 5: How Will We Get There? IDEA Strategic Plans

BACKGROUND IMAGE OF A TREE (PAGE 48)

Several trees against a soft pink and purple background with twinkly lights throughout the branches.

TEXT BOXES (PAGE 50)

Text boxes include the following images from top left descending down: dialogue bubble, puzzle piece, light bulb, head with plant growing out of the top, two hands embraced in a hand shake

R E F E R E N C E S

References

- Anderson, P. (2021). Building a culture of accountability. The Stanford Review. https://ssir.org/articles/entry/building_a_culture_of_accountability#
- Anti-oppression. (n.d.). Beautiful Trouble. <https://beautifultrouble.org/toolbox/tool/anti-oppression/>
- Asian Americans/Pacific Islanders in Philanthropy. (2023). National Gender & Equity Campaign (NGEC). <https://aapip.org/national-gender-equity-campaign/>
- Bauer, G. (2021). Meet the methods series: Quantitative intersectional study design and primary data collection. Canadian Institute of Health Research, 3(1). <https://cihr-irsc.gc.ca/e/52352.html>
- Bradbury, S. (2021). Report finds Colorado's victim services programs and funders lack diversity. The Denver Post. <https://www.denverpost.com/2021/12/07/colorado-victim-services-diversity/>
- Brown, A.M. (2017). Emergent strategy: Shaping change, changing worlds. AK Distribution.
- Center for Excellence in Nonprofits (2021). Inclusion, diversity, equity, access, and liberation. <https://www.cen.org/ideal.html>
- Center for Intersectional Justice. (n.d.). What is intersectionality. <https://www.intersectionaljustice.org/what-is-intersectionality>
- Children's Advocacy Center of Kent County. (2023). Diversity, equity, inclusion, and belonging. <https://www.cac-kent.org/our-services/deib/>
- David, E.J.R. & Derthick, A. O. (2017). The Psychology of Oppression. Springer Publishing. DOI: 10.1891/9780826178176
- DeHart, D.D. (2003) National Victim Assistance Standards Consortium: Standards for Victim Assistance Programs and Providers. Columbia, SC: Center for Child and Family Studies, University of South Carolina
- Doering, D. (2019). Craft the perfect diversity statement for your organization. G2. <https://learn.g2.com/diversity-statement>
- Dwivedi, O.P., Khator, R., Nef, J. (2007). Marginalization and Exclusion. In: Managing Development in a Global Context. Palgrave Macmillan, London. https://doi.org/10.1057/9780230627390_5
- Emergent Strategy Ideation Institute. (2023).The history and practice of emergent strategy. <https://esii.org/about/>
- Family Services of Peel. (2023). Research and training. <https://fspeel.org/peel-institute/research-development/>
- Ganz, M. (2016). Where's the power? Developing your theory of change [template]. The Commons Social Change Library. <https://commonslibrary.org/wheres-the-power-developing-your-theory-of-change-template/>
- Grantmakers for Effective Organizations. (2014). What is nonprofit capacity and why does it matter? <https://www.geofunders.org/resources/what-is-nonprofit-capacity-and-why-does-it-matter-675>
- Harlap, Yael (2008). A Map of Myself in Road to Global Citizenship: An Educator's Toolbook. Global Citizenship Community of Practice, Centre for Teaching and Academic Growth. Unicef. The University of British Columbia.
- Harris, S. J. (n.d.). It's surprising how many persons go....[quote]. Quotes for Positive Living. <https://greatday.co/q/?q=1584#:~:text=Sydney%20J.%20Harris%20Quote%20It%27s%20surprising%20how%20many,can%27t%20be%20comfortable%20with%20others.%20Sydney%20J.%20Harris>

- Healy K (2014) Social work theories in context: creating frameworks for practice, 2nd edn. Palgrave. Macmillan, Houndmills.
- Ingham, I. (2007). Social liberation. <https://web.pdx.edu/~ingham/syllabi/SocialLiberation/AdvSocLib.htm>
- Kawaoka-Chen, Dana & Powers, Megan. (2009). Chronicles of Change: An Organization's Guide to a Theory of Social Change. National Gender & Equity Campaign. Asian American/Pacific Islanders in Philanthropy
- Kristenson, S. (2022). 6 SMART goals examples to support diversity and inclusion. Develop Good Habits. <https://www.developgoodhabits.com/smart-goals-diversity/>
- Matthews, et. al. (2020). Anti-oppressive practice. Critically Infused Social Work. <https://www.criticallyinfusedsw.com/antioppressive-practice>
- Merriam-Webster (2023). Inclusion. <https://www.merriam-webster.com/dictionary/inclusion>
- National Equity Project. (n.d.). The lens of systemic oppression. <https://www.nationalequityproject.org/frameworks/lens-of-systemic-oppression>
- National Resource Center on Domestic Violence. (n.d.). Domestic violence evidence project. <https://www.dvevidenceproject.org/wp-content/uploads/DVEvidence-Services-ToC-2016.pdf>
- Ogorchukwu, Jacquelyn (2023, Jan 12). [Image "Design of Language"] Instagram. Retrieved from: https://www.instagram.com/p/CnUwx4dPGEr/?utm_source=ig_web_copy_link
- Race equity glossary of terms. (n.d.). Educate not Indoctrinate. <https://educatenotindoctrinate.org/race-equity-glossary-of-terms/>
- SASHA Center. (2023). Black women's triangulation of rape. <http://sashacenter.org/#>
- Sullivan, C.M. (2012, updated January 2016). Examining the Work of Domestic Violence Programs Within a "Social and Emotional Well-Being Promotion" Conceptual Framework., Harrisburg, PA: National Resource Center on Domestic Violence at www.dvevidenceproject.org
- Schulman-Hall, J. (2022). Vermont judiciary to hold public forums on diversity, equity, and inclusion in the court system. VT Digger. <https://vtdigger.org/2022/12/01/vermont-judiciary-to-hold-public-forums-on-diversity-equity-and-inclusion-in-the-court-system/>
- Sensoy, Özlem; DiAngelo, Robin (2017) Is Everyone Really Equal?: An Introduction to Key Concepts in Social Justice Education (Multicultural Education Series), 2nd Edition. 1st Edition 2012. Teachers College Press.
- Sherman, F. (2020). How to determine workplace priorities. Chron. <https://work.chron.com/determine-workplace-priorities-17470.html>
- Taylor, B. (2019). Intersectionality 101: What is it and why is it important? Womankind Worldwide. <https://www.womankind.org.uk/intersectionality-101-what-is-it-and-why-is-it-important/>

University of California Berkeley. (2015). Strategic planning for equity, inclusion, and diversity. https://diversity.berkeley.edu/sites/default/files/admin_strategic_planning_toolkit_final.pdf

U.S. Department of Housing and Urban Development. (n.d.). Diversity and inclusion definitions. https://www.hud.gov/program_offices/administration/admabout/diversity_inclusion/definitions

Warnken, H. (2021). A vision for equity in victim services: What does the data tell us about the work ahead? Office for Victims of Crime. <https://ovc.ojp.gov/media/video/12971>

Weber, B. & Smith, C. (2023). Organizational capacity defined. Greater Phoenix in Business. <https://inbusinessphx.com/in-business/organizational-capacity-defined#.Y7dk7XZKjIV>