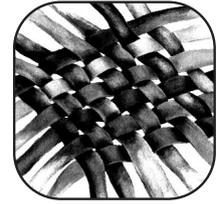# MODULE 17: COMPLETING YOUR INCLUSIVENESS BLUEPRINT

Step One: Creating Your
Inclusiveness
Committee

Step Two: Training and
Consultants

Step Three: Definitions and
Case Statement

Step Four: Gathering and
Analyzing
Information

Step Five: Creating Your
Inclusiveness
Blueprint

Step Six: Implementation

MODULE 17: COMPLETING YOUR INCLUSIVENESS BLUEPRINT

Overview of Content

In this module, you will:

- Review the purpose and outline of an inclusiveness blueprint from *Module 8: Creating the Framework for an Inclusiveness Blueprint*.

- Review and update (if needed) the definitions of diversity and inclusiveness that you developed in *Module 4: Creating the Case for Inclusiveness.*

- Review and update (if needed) the case statement that you developed in *Module 4: Creating the Case for Inclusiveness.*

- Determine who will be responsible for writing, reviewing, and approving the inclusiveness blueprint.

- Finalize the inclusiveness blueprint.

This module should be completed by every organization that has completed any or all of the *Modules 9-16*. Completing *Module 8: Creating the Framework for an Inclusiveness Blueprint* is a prerequisite for completing this module.

Who to Involve

The work in this module will be completed by the Inclusiveness Committee as a whole.

Exercises to Complete

- *Exercise 17-A: Assigning Roles and Responsibilities*

Step Five: Creating Your Inclusiveness Blueprint

MODULE 17: COMPLETING YOUR INCLUSIVENESS BLUEPRINT

Review: What Is an Inclusiveness Blueprint?

As discussed in *Module 8: Creating the Framework for an Inclusiveness Blueprint,* an inclusiveness blueprint is a plan your organization creates to ensure that desired changes you identified as a result of the information-gathering process are put into place. It is a plan that outlines your priorities and action steps for becoming more inclusive. An inclusiveness blueprint is a lot like a detailed strategic plan. It includes goals, objectives, tasks, timelines, and the party(ies) responsible for accomplishing each task. Return now to *Module 8, Exercise 8-A: Creating a Framework for Your Inclusiveness Blueprint*. Review the framework you created and determine whether it still meets your needs or whether it needs updating.

Then return to *Module 4: Making the Case for Inclusiveness* and look at *Exercise 4-A: Defining Inclusiveness and Diversity for Your Organization* and *Exercise 4-E: Writing Your Case Statement*. Decide whether the definitions of inclusiveness and diversity you created in the early stages of the inclusiveness initiative are still appropriate. If they need updating, the committee may want to delegate the responsibility for updating them to a smaller group. Similarly, determine whether the case statement you created in *Exercise 4-E* is still appropriate. If not, the committee may want to delegate the responsibility for updating the case statement to a smaller group as well.

Roles and Responsibilities

In this final phase, divide the responsibilities for completing the inclusiveness blueprint into three distinct areas:

- Writing
- Reviewing/prioritizing
- Approving

Writing the Inclusiveness Blueprint

Your blueprint will likely include the following major sections:

1. Introduction to the Inclusiveness Initiative: Why you decided to do an inclusiveness initiative, the process you engaged in, definitions of diversity and inclusiveness, case statement.

2. Key Findings from the Information Gathering: A summary of the results of your research on available facts and stakeholder perspectives.

3. Action Plan for Each Prioritized Category: Goals, objectives, and

tasks for each of the categories that you prioritized in *Module 8*. The full list of categories is as follows:

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

4. Accountability: Your plan for evaluation, making sure tasks are completed, and revisiting the blueprint to revise it as necessary.

5. Conclusion: A summary of your initiative and the actions you plan to take.

It may make the most sense for different people to write different parts of the inclusiveness blueprint. Members of the Inclusiveness Committee who have knowledge of the inclusiveness initiative and the information-gathering process are good candidates for writing the first two sections of the inclusiveness blueprint – Introduction and Key Findings.

The third section is a compilation of the action plans written in *Modules 9* to *16*. Each group that took responsibility for working on a particular category (e.g., board of directors, fundraising, etc.) can add narrative to the action plan it wrote.

The fourth and fifth sections – the Accountability Plan and Conclusion – may be written by members of the Inclusiveness Committee or senior management.

Reviewing the Inclusiveness Blueprint

This is a critical step in the inclusiveness initiative. Once you assemble all of the components of the inclusiveness blueprint in one place, an individual or a group of individuals who oversees or manages most or all of an organization's work (such as senior management, the CEO/executive director, and/or the chair of your board of directors) should review the whole inclusiveness blueprint. At this stage, the blueprint should be assessed for:

- Overall Feasibility: A critical step in the review process is assessing whether the organization has collectively taken on an appropriate amount of work to become more inclusive. It is easy to get too ambitious in this process and to take on more than your organization
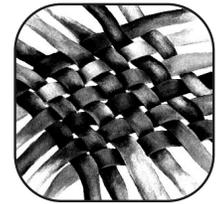
can accomplish in a finite period of time. Whoever is responsible for reviewing the final inclusiveness blueprint should give serious consideration to whether your organization's systems and people can absorb the amount of change suggested in the combined action plans.

- Detail Feasibility: As in any good planning process, it is important to challenge yourselves to make a substantial impact with the inclusiveness initiative, yet you don't want to set goals that are unrealistic and end up discouraging people because they aren't able to meet expectations.

[
For example, it may not be realistic to include a fundraising goal to increase contributions from people of color by $100,000/year in the next two years when contributions by people of color haven't ever surpassed the $10,000 level.
]

- Potential Overlap of Activities: Since you don't want to duplicate efforts, make sure that people are clear about their responsibilities and that responsibilities do not overlap unnecessarily.

- Continuity and Consistency: If different people write different sections of the blueprint, there likely will be inconsistencies in writing, presentation, and style. Look for inconsistencies in terms of goals/values, the level of detail provided, the amount of time that people anticipate certain tasks taking, and in language and tone.

- Gaps: Even though you've been through this relatively comprehensive planning process, it is possible that you will find things that should be done but that have not been included in the blueprint. This is the time to identify those gaps and develop additional strategies, if necessary.

The entire Inclusiveness Committee should also review the inclusiveness blueprint to ensure that they understand the content and that it accurately summarizes the work that has been done. At this stage, senior management should take the ultimate responsibility for ensuring that the final product is consistent with the organization's overall strategic goals.

Approving the Inclusiveness Blueprint

Once the blueprint has been written, reviewed, and edited, it is time for formal approval. There is no absolute rule about who should approve the inclusiveness blueprint; however, in most cases, the responsibility will fall to the board of directors. There are three reasons for this:

1. There likely will be policy implications and strategic priorities embedded within the blueprint that the board should approve.

2. The blueprint may require allocations of resources of which the board should be aware.

3. Most importantly, the board should feel collective ownership of the inclusiveness blueprint. As you move into the implementation phase of the inclusiveness initiative, you may face challenges, some of which the board of directors may be aware of or even involved in. The more ownership the board has over the inclusiveness initiative, the more likely they will be to protect it during challenging times.

Writing an Executive Summary

If you decide that the full inclusiveness blueprint is so long that some of the people you want to review it will likely save it for a rainy day and never get to it, then it might be a good idea to write an executive summary. Anyone on the Inclusiveness Committee who has a good grasp of the inclusiveness initiative would be appropriate to write an executive summary.

Complete *Exercise 17-A: Assigning Roles and Responsibilities.*

Track your progress in completing Module 17 on the End-of-Module Checklist, located after the exercises.

Module 17: Completing Your Inclusiveness Blueprint

CHC Inclusiveness Committee completes its blueprint.

The CHC Inclusiveness Committee met to hear the results of the sub-group meetings on the Board, volunteers, and fundraising. After the three groups reported out, the committee discussed some minor editing of the goals and action items.

"I see some overlap between the volunteer plan and the fundraising plan," said Hector. "Are you going to end up duplicating efforts?"

"No, our intention is to work together. When Luisa finds a volunteer who might be interested in events, she'll let me know, and I'll be keeping an eye out for Spanish- and Vietnamese-speaking volunteers," said Eleanor.

"We might share booths at recruitment fairs," explained Luisa. "But we'll coordinate all of our efforts. Perhaps we could clarify that by adding it as an action step."

"Good idea," said Hector. "That's the kind of practice we should be promoting throughout the organization. This will be a good start."

With those changes, the committee endorsed the recommended strategies.

"Great work, everyone," said Joe. "Now we need to talk about who will write the actual blueprint. Normally, I'd throw this open, but I've already talked to three people who have said yes. Eleanor, Marcie, and Luisa, thank you for agreeing to take this on. I'll serve as the first editor,

then the committee will get a crack at it. Finally it will go to the staff and the Board."

"That sounds good," said Luisa. "Just be patient with us if it takes a few weeks!"

"Of course," said Joe. "Before you get started, we need to look back at our case statement." He passed around copies of the case statement and asked for feedback.

"I don't know if it's too late to do this," said Marcie. "I know we've been focusing on issues of race and ethnicity. But I think we should add a sentence about the importance of addressing the intersection of race and class, as it affects the staff, our clients, and our volunteers."

"That sounds like a good idea, but does it take us off in another direction?" asked Melody. "It's so exciting what we're planning to do this year. It wouldn't be good to distract people."

"I don't know, Melody," said Joe. "I think it could just serve to keep us open in the future. And I'm sure that those issues are going to come up in the three areas we've chosen to prioritize."

"I guess you're right," she said, and seemed satisfied.

There were no other modifications and the committee agreed to adopt the suggested change. After the meeting, Marcie, Eleanor, and Luisa stayed behind, reviewing the outline of the inclusiveness blueprint.

"How about if I write the Introduction, the Accountability Section, and the Conclusions?" said Marcie. "Eleanor, you were part of the information gathering - why don't you do the key findings?"

"Sure," she said. "And then Luisa and I can do the action plans."

"That's a deal," said Luisa. "Now, what's our deadline?"

They agreed to meet again in two weeks to go over their first drafts.

Two weeks later, Eleanor, Marcie, and Luisa finalized their first draft and submitted it to Joe, who edited it and sent it to the rest of the Inclusiveness Committee.

Once a complete draft was approved by the committee, Joe, Beth, and Jeff sat in a restaurant with Mrs. Dreyfuss. After finishing their meals, they ordered coffee and brought out a copy of the blueprint. They walked Mrs. Dreyfuss through the material, especially emphasizing the key findings and the benefits to CHC of becoming more inclusive.

"Well, I should have expected this after what we discussed about the fundraising," said Mrs. Dreyfuss, trying to absorb all that she'd heard. "This sounds like a lot of change for an organization that was doing pretty well in the first place."

Beth offered her perspective. "It is, but I think you'll admit that the potential benefits to us are huge. Most other clinics are way ahead of us on this, especially on expanding the inclusiveness of their Boards."

"They could just be making those changes to be politically correct," said Mrs. Dreyfuss.

"That could be part of it," said Jeff. "But I think a bigger part is in those changing demographic numbers. I honestly believe we need to get ahead of this curve."

"Besides," said Beth. "We'll still be continuing to do what works. We're just going to be changing some systems for the better, and adding some new activities."

"So what do you say?" asked Joe. "Will you support this plan and help us submit it to the Board?"

Mrs. Dreyfuss thought for a moment, running her finger over the numbers describing projected population changes in the next ten years. Finally she looked up. "All right," she said. "I'll do it."

Joe set up a special staff meeting to present the blueprint to the staff. Luisa and Marcie brought in a cake in from the bakery down the street. Written on the top were the words "Blueprint Accomplished!" in four colors of frosting.

Joe stood up and said, "We should be very proud of what we've done so far. Let's give the Inclusiveness Committee a round of applause!" The staff members clapped and accepted pieces of cake from members of the committee. As they ate, Joe asked them to walk with him through the outline of the blueprint and to ask questions about how the changes would affect CHC.

At the end of his presentation, Olivia Jackson raised her hand. "Joe, I'd just like to thank you."

"For what?" he asked.

"For your leadership," she said. "I've worked here awhile, and we've talked about a lot of these ideas over the years. But we've never brought them together in one place. It seems like this is really going to happen now!"

Joe smiled. "That's the plan, anyway. What happens next is up to all of you."

EXERCISE 17-A

Assigning Roles and Responsibilities

Instructions:
Decide who will complete the following responsibilities and the date by which they will be completed.

Responsibility	Responsible Party	Completion Date
Rewrite diversity/inclusiveness definitions (if needed).		
Rewrite case statement (if needed).		
Write introductory section.		
Write overview of information gathered.		
Write narratives for each action plan (optional).		
Compile all elements into one document.		

Responsibility	Responsible Party	Completion Date
Review/edit first draft of inclusiveness blueprint.		
Approve final inclusiveness blueprint.		
Write executive summary of inclusiveness blueprint (optional).		

Date Exercise Completed _____

END-OF-MODULE CHECKLIST

Module 17

Action Item	Date Completed	Notes
Review content on writing, reviewing, and approving the inclusiveness blueprint.		
Decide who will complete all aspects of writing, reviewing, and approving the inclusiveness blueprint.		
Complete the writing, reviewing, and approving of the inclusiveness blueprint.		
Recognize your progress to date and communicate it to appropriate stakeholders.		