Sean Thomas-Breitfeld:

Hello. Welcome to the webinar. We'll get started in a moment. We've got a lot of folks who are still signing in and we're really excited about how many people registered for today's webinar, really excited to talk to all of you about the Building Blocks for Change Assessment. We'll get started in just another moment.

Looks like we still have a few more people signing in, but it is a minute after by my watch, so I think we'll start the conversation. I do want folks to know that there will be a recording of the webinar that will be shared on BMP's page, also on our YouTube page, and everyone who's registered will get access to the recording, a transcript of the conversation, a lot of materials so that folks can follow up on all the information that we'll be sharing over the next hour. But we're really excited to have so many people here with us today to learn about the Building Blocks for Change Assessment.

Can we move into the next slide? I want to acknowledge that I'm Sean Thomas-Breitfeld, co-ED of the Building Movement Project, but I am not Mercedes Brown. Unfortunately, Mercedes is not able to join us today because COVID has hit, and so I'm filling in, but really excited, again, to share this information with you and to have this conversation with our panelists. I'm also joined by other members of the BMP staff team, Olivia Peña, who you'll hear from in just a few minutes, and then there are bunch of folks also helping out behind the scenes. Want to thank Cameron on the BB4C team, as well as Jazz and [inaudible 00:02:47] and the whole rest of the Building Movement Project team that have helped us get to this point of launching the... I also want to thank our panelists, Farah Council, Gita Gulati-Partee, and Annie McKay, and you'll hear much more from them later on in the webinar today.

My colleagues are dropping in links and information in the chat so that you can get more information about the assessment, but I want to talk a little bit more about what our agenda is and start moving into the conversation and getting to know a little bit more about who's in the room with us today. So for our agenda today, we're going to be engaging with you in a variety of ways. We do have some slides that we want to show. We'll also have polls. There'll be a Q&A function. We are going to talk about the background and provide an overview of the building blocks for Change Race Equity Assessment, and then we'll have a panel discussion as well.

I encourage folks to use the Q&A feature. If they're questions that can easily be answered, some of the BB4C and BMP team will respond in the moment. Other questions will probably get directed to me once we get into the panel conversation as well. Again, the webinar will be recorded and all the information will be sent to everyone who registered within the next week. So with that as a sort of starting point, I want to turn it over to Olivia to do some poll conversation so we can get a sense of who's with us in the room. Olivia, take it away.

Olivia Peña:

Great, thanks so much, Sean. So as Sean said, we'd love to get a sense of who's in the room with us today and what really brought folks to the webinar. So to start, we'll launch our first poll question. So we'd love to know, what role do you most closely identify with in your work? So, are you an employee of a direct service organization? An advocacy organization? Or an intermediary or capacity building organization? Are you a DEI professional? So are you a consultant or a coach? Are you a funder? Do you fund work related to race equity or something else? So looks like we're waiting for a little less than one third of the group to respond now, so we'll just give it a few more seconds. And lots of great responses coming in.

All right. So, thanks for weighing in folks. Looks like we have a good mix of participants in the room today. Looks like there's a lot of folks who do work in the capacity building space as DEI professionals or employees of an organization that supports capacity building. We also have a mix of direct service

provider organizations, advocacy, some funders, and some other folks who are not represented in the poll. So thank you and we'll move on to our next question.

All right. So next we'd love to know, where is your organization on the spectrum or journey around race equity? So, has your organization not yet started doing any race equity work? Are you coming up against some challenges in even launching? So maybe experiencing some active resistance. Is your organization just beginning this work? Or maybe you've been at this work for a little while and you've built some internal work or commitment to race equity, but maybe bumping against some challenges related to implementing. Or maybe your organization is a model for other organizations and peers in the field. We'd love to know where your organization falls. So again, waiting on maybe one third of the group left to respond, but great responses coming in.

All right, great. So, it looks like the vast majority of groups in the space have kind of started this work already, building some kind of internal commitment, but maybe thinking about what the next steps in implementing change looks like in their organization. Also a good mix of organizations who are serving as leaders for their peers or organizations who are just getting started. Well, thanks so much folks and enjoy the webinar.

Sean Thomas-Breitfeld:

Thanks so much Olivia. And just as a reminder, we are recording the webinar and everyone who has registered for today's webinar will get access to a recording, transcript, et cetera. And all of that will be sent out as a follow up within the week, not within this week, within the next seven days. Sorry.

So, I want to start out by giving a little bit of background on the research behind the assessment. So on this slide, what we're showing is some of the report covers of reports that we've done in the Race to Lead initiative that BMP has done. And the reason we're lifting that up is because we started doing this research about race and leadership in the nonprofit sector back in 2016 and that very first Race to Lead survey in 2016 actually is where this idea of an assessment first came from in part because we had colleagues who were in the DEI consulting space say, "Oh, there are great questions in the survey that could be useful for an organizational assessment." And so that started this process of considering, would that be a useful thing for BMP to develop? How would we actually make it happen?

And so when we did, in the end, decide to start building this assessment, it was because we had looked at what tools were already available in the nonprofit sector and that were geared, in particular, to nonprofit organizations. And we saw that there were a number of tools that were like audits for nonprofit leaders who reflect on their internal policies and procedures. And there were other tools that were more geared to helping individual staff people understand and assess their own orientation and attitudes around racial difference. Both of those approaches are useful and important, but what we, at BMP, wanted to understand was how to think of staff and leaders as part of an organizational system in order to really make a change internally.

And so that's why we moved in the direction of developing this assessment that is based on how staff are viewing and experiencing the organization. And so when we resurveyed the field with the Race to Lead survey in 2019, there were questions that we built into that survey where we were basically testing out elements of the assessment back in 2019. That is also the year that we started doing beta testing of the assessment. And so it's been a lengthy and rigorous process of getting to this point of launching this tool.

On the next slide, I'm going to start talking about the overview of the assessment and the overall process. And so on this next slide, you can see the homepage of the Building Blocks for Change assessment. It is a assessment that assesses staff experience particularly through the length of four key capacities; learning, leadership, conversation, and voice. And we see those as fundamental capacities for organizations engaging in racial equity work. And the assessment operates based on a survey of staff

members. And once that survey process is completed where each individual staff member fills out the survey from their perspective and their experience, BMP is then able to generate a custom report for the organization that is based on the aggregate staff responses. And the report is customized and shaped by algorithms that BMP has spent several years developing based on all of the beta testing that we've been doing since 2019. In addition to that custom report, there are a whole set of supplemental tools and materials, and I'll talk about that more when we get into the dashboard.

On the next slide, you can see a different way of looking at this framework. Again, the four capacities that we've identified are learning, leadership, conversation, and voice. And you can see this visual of how those building blocks, those four capacities connect to each other and interrelate. And then in addition, we look at each of the capacities through the lens of three focus areas; motivation, practice, and structure. And again, we'll dig more into how all of that fits together in later slides.

I want to, on this next slide, emphasize that we see this assessment as a process. It is not just a report, it is not just a survey. The survey and the custom report are situated within a larger process, and that's because we think that it's really important for organizations to really commit to making change. And we know that just getting data often is not sufficient to get an organization to commit to change. So we do provide resources to help organizations get ready. So that's the pre-phase one step. Phase one is focus on getting everyone in the organization's staff to fill out the survey. At the end of that, the organization gets a custom report, as I said earlier, but that is the kickoff of phase two that is focused on essentially meaning making and having the organization engage in discussion to make meaning of the insights from the data. And from there, there are additional resources to help organizations facilitate dialogue about the custom report and moving to action. But the last phase of this process is about organizations committing to ongoing implementation of strategies to make their workplaces more equitable and inclusive.

On this next slide, you can see that we are emphasizing that it's important for organizations to think about designating one to three people who will form what we're calling an assessment team. And one of those people will also be a process lead or the person who stewards their organization through all the phases of the assessment process. And the full process that I showed on the last slide can take six to nine months, but remember that BMP and the Building Blocks for Change team is most intensively involved with organizations as a part of phase one when staff are filling out the survey, which is critical to us being able to produce the customer report that is the kickoff of phase two. But again, we have created a whole set of resources to help organizations move through the entire process. And then this range of hours from one to 15 hours per week, it's really going to depend on the size and complexity of the organization as well as where the organization is in each of the phases over the course of the whole process.

On the next slide, we're just showing some more of what you get as an organizational user of the Building Blocks for Change assessment process. So again, survey and custom report are key elements, but we have these other library of resources to support organizations throughout the process, like communications templates to encourage staff to fill out the survey, updates from BMP staff and the help desk to help organizations stay on track as they move through the phases of the assessment process, discussion guides and support meaning making and action planning, and many more tools as well.

I'm going to start, on this next slide, talking about the report itself. So this, again, is a custom report based on the aggregate data from staff of the organization filling out the survey. And in the chat you'll get reminded of the link to access this template report just so you can have a fuller description and look at it at your own pace. But I do want to show a few pages from the report.

And so on this next slide you can see the overview of the four capacities. And what we're showing in the visualization on the right is how, and this is a hypothetical organization, but how staff perceive the organization doing related to each of the four capacities. And in this case, the organization is further

along on the voice capacity. Now, these are not meant to be scores, what we're trying to do is help organizations recognize where, based on the aggregate responses of staff, people feel the organization is at the moment that they were filling out the survey. It's a moment in time. And I also want to be clear that we're not trying to benchmark organizations against each other in these reports. This is the information, this is all based on the data from the staff of the organization.

On the next slide, we're drilling down just a little bit more into a particular capacity and there's a page that looks pretty much identical to this for each of the four capacities. But what you see at the top right is in addition to just the overall learning capacity, where the staff feel like the organization is, also providing a little bit more of a granular look, again, the three focus areas of motivation, practice, and structure. And we have noticed that it's pretty common for the results to look like this where people feel that the organization is further along in motivation than it is in having implemented real practices or committed to our embedded structures that make any of these capacities more continuous and vital parts of the organization. And then underneath that bar at the top, we show each of the measures, which are survey questions, that are associated with that capacity and which one's rated highest, which one's rated lowest, again based on the aggregate responses.

On the next page, showing another way of [inaudible 00:17:24] the information in a more granular way where we are able to do some disaggregation of the data, when possible, so that an organization can know if a particular staff group is having a different experience from the rest of the organization. Now, disaggregation is going to depend on the organization's size, on the diversity of the organization. We recognize that people often want the most disaggregation possible and we are very committed to protecting anonymity, particularly of small groups of staff. And so if disaggregation is a priority for you and your organization, I really want to encourage you to fill out the contact form on the building blocks for change website because then the BB4C team can follow up with you within two business days and get more information or share more information about what kind of threshold we've put in place to protect staff anonymity. Also, race is not the only way that we're able to disaggregate the aggregate data. So again, reach out to the BB4C team through that contact form to get more information about some additional ways that the report can be customized.

The next slide just showing that the last section of this custom report is going to provide organizations with tips and resources, things that are available online that can help organizations make progress on each of the four capacities. And then if there are particular areas of concern based on the data, we are able to also flag that for organizations in the report. For instance, this hypothetical organization was big enough to identify that Black staff in particular are expressing that they don't feel safe to express what they think during conversations about race equity. Okay?

Moving into the dashboard, and this is the last few slides and then we'll move into the panel conversation, but it's really exciting to have this dashboard because it is a password-protected dashboard for organizations that are utilizing the assessment. And it's also the way that organizations are going to be able to get in contact with the BB4C help desk.

And on this next slide, just showing one of the pages of the dashboard where you can see an example of material that we've developed. In this case, it's a worksheet to help an organization reflect on the findings of their custom report. And so it's labeled 2C because it's a resource that's appropriate to phase two, when the organization is engaging in meaning making, and C because it's the third document that's being provided for that phase. And again, there's a wide range of materials that we've created. There are agenda templates, there are PowerPoint presentations, there are tutorial videos, there are FAQs, and I'll show you an FAQ in a later slide.

On this next slide, just again emphasizing that the dashboard is really about helping organizations and the process leads move their organizations through all of the phases of the assessment process. This is a

page about getting ready for phase one. So phase one is when the survey is live and organizational staff are filling it out. So as a part of getting ready for phase one, we are encouraging organizations to schedule meetings for all the phases in advance so that the organization can set its own timeline for moving through the process. Those are some of the things that we have started to develop as checklists to help organizations stay on track as they're moving through the assessment process.

On this next slide, showing one of the FAQs. Again, we've tailored FAQs to the particular phase that our organization would be in the assessment process. And this is where our rigorous beta testing really came in handy because the Building Blocks for Change team was able to anticipate what questions come up at which phase in the assessment process. So, that's background on the assessment, and I want to move us into the panel discussion because I'm really excited to be able to have this conversation with some colleagues who have been able to utilize the assessment, both inside of their own organization as well as in work that they've been doing with other organizations they provide support and capacity building too.

So I want to start by welcoming Farah, Gita, and Annie into the conversation. Thanks all for being here. Really appreciate you taking the time to have this conversation. And I want to start off with having Farah talk a little bit about the experience that you had as a early tester of the assessment and then also bringing BMP back in to support a cohort that your organization was a part of. Can you talk more about what your experience had been and what you found valuable and why you continue to engage with us around this assessment process?

Farah Council:

You bet. Hi everybody, and thanks so much for inviting New Mexico Voices for Children to be a part of this. We are an organization that's been around for over 30 years, we're an advocacy organization on child wellbeing, and in 2020 Sean reached out to me to see if we might want to beta test the assessment. And we said yes, we're a staff of about 15 people and we had been on our equity journey for about, I don't know, since 2003, but only within the previous two years had we really started thinking and talking about internal equity, internally-facing equity, and organizational culture. And we were really starting to dig into that and just our leadership had buy-in on that and I was co-leading our equity work with another colleague and we were feeling the need to do more trust building and container building so that we internally could have discussions about power and positionality. And when Sean reached out and we saw what this assessment looked like and what it was assessing for, we were really interested.

We felt like it would probably be right up our alley in terms of where we were at and the types of things that we wanted to look at. So we did that in 2020, and I'll share a little bit more about what we took away from that report in a second, and then in 2021 my director and I were asked to co-facilitate a cohort of 10 Kids Count organizations across the nation, a race equity cohort. And we brought in Sean and Olivia as a core component of that, to invite those 10 organizations to actually do the assessment. And the assessment had changed quite a lot from when we had done it about a year and a half earlier, and so we were able to see those changes, really see the way in which the assessment was expanded based on all of the beta testing.

So, a couple things that I was really thinking about in preparing for this were the things that I thought have stayed similar about this assessment and then some of what changed based on the cohort assessments that we offered folks. First, I'll just say that working with Sean and Olivia was just delightful. We have built such a great partnership over the years and some of why we enjoyed the assessment, and I know enjoy is an odd word when we're talking about DEI work, but we really enjoyed it because our experience has been very relational and building movement project is extremely thoughtful and you can see that in the breadth from sort of beginning to end and the amount of support that's offered in this assessment and guidance and the way that's been fleshed out over the years to be extremely thorough. So, just happy to be here with you all again.

So the things that we saw that have stayed similar is the thoughtfulness and the rigor in developing the assessment and then the support throughout the process has been the same, questions that come up. I think one of the pieces that we really appreciated both in our individual org assessment but also with the cohort was the thoughtfulness in making sure that one to three people are brought in from the org to do it so it's building capacity within the organization of the people within, not external TA necessarily, that obviously comes into play towards the end when you get the results and the need for that, but assigning and really supporting one to three people to really get prepared to talk about the assessment, get prepared to get the team to do the buy-in, to take the assessment, which can be challenging and it's hard to get everybody to participate.

People are busy, some folks are afraid of this material, some of us have assessment adversity because we haven't put them to use because we've done them in the field of DEI. And so just that support from the beginning into the end and specifically about [inaudible 00:26:48] facilitate and message the results. Because sometimes what comes out of the results can point us in directions that might not be our strong suit or our skillset in organizations. And so all of that is still there.

I would just say that what's different is that it's more nuanced and more in depth. So in looking at the newer assessments, ours was simple. I think we got a four-page report and now the report's like 28 pages. So that gives you a sense of just how much, over time these have expanded. So the support is there, it's just more in depth and a lot more about how to share the results and how to message those results. I really appreciate, in the new reports, the acknowledgement that this is a long game and that these phases take time and they should take time and they have to be thoughtful and they have to be mindfully executed.

And additional, when we got it, we had just four domains and it was like a picture and it was with colors instead of numbers, which we loved that, and it showed that our biggest efficiency was around conversations and it told us some of the things we needed to do, but it was just a summary. And so it helped us have a pivot and a compass direction and that's what we did at our orgs, we started to focus on container building and relationship building and capacity building for conflict and things like this. In the newer report it's much more nuanced. And so even within those four domains, there's now additional categories and within those, when you get each domain, you are able to see the most and the least developed and it's almost like it just gives you a roadmap and there's so much more information around the roadmap.

And then the piece that's really important that is there now is the getting to action piece which links to a ton of resources. And so I think sometimes after we do an assessment, there's this big "then what" of how to do it and where to find the information. And just the last thing I'll say is that the thing that, to me, is most important about this is it really is an assessment that helps us look at organizational culture and really look at the deeper work, which sometimes or almost always is the hard work, but it gives us a sense of where those resources are needed to be invested but also concrete resources and support about how to begin to do that work. So that's what I would say. I would just say that I think, Sean, I'm just so inspired by the work that y'all do and how you do it and that the extensiveness of this assessment now.

Sean Thomas-Breitfeld:

Yeah, thanks so much Farah. And I'm going to shift to Annie because Annie got looped in to that cohort that was the cohort that Farah and the team from New Mexico Voices was helping to lead with other Kids Counter organizations. So Annie, in your experience administering the assessment process and supporting a cohort of organization in a peer learning setting, I'm curious what benefits to organizations you observed?

Annie McKay:

Thanks, Sean. And like any good panelist, I'm not going to answer the question that you asked first, instead I'm going to heap praise like Farah did and just really want to just double down on Farah's experience with Building Movement project and being relational and thoughtful, and I will add curious. And the reason why I want to double down on that is because it really comes through in the assessment, it comes through in the accompanying tools with the assessment, and it also comes through in the support. And I do think that that's a difference with this assessment and I think it's what really hits a particular sweet spot.

As Sean mentioned, I had the good fortune to be involved in the cohort that Farah talked about and what I really saw was that the cohort or peer support learning model really provided an opportunity for organizations to make meaning together, to see the commonalities in their journeys, to share experiences and lessons learned. I think it also helped organizations to feel less isolated, in where they were and what they were facing.

I mean Farah said, she just ended by saying that this is hard work and I think that cohort model helps make the lift feel a little less heavy, to be honest. I've worked with a lot of teams. I used to in a time long ago, a land far, far away, I used to lead a state advocacy organization. So I certainly have that experience on the other side. And now as a consultant, I work with a lot of teams who really think that they're quite unique in their areas for growth, and while you all are special individuals, not denying that, the challenges we see, not entirely universal, but certainly a lot of common themes. And again, to go back to that feeling less isolated, I think that cohort experience really helps people feel like, I'm not in this alone, there's not something particularly wrong or deficient about my organization.

I also saw in one of the poll questions that there's some folks here with us today who are experiencing active resistance and/or organizations are not currently engaging. I think being in space with others who aren't resisting or who are engaging can also help support those reluctant and resistant organizations to really embrace the opportunity and lean into that change. I have a number of times said, "Let's connect your ED with this ED," or, "Let's get your board chair with this board chair." And I think that cross pollination is also a really important aspect of the cohort experience.
Sean Thomas-Breitfeld:

Thanks so much, Annie. And I want to shift now to Gita because you also had worked with a cohort that did end up being testers of the assessment, but I think you had a different experience because it wasn't like everyone was going through it at the same pace, which actually I think is really useful, different experience for understanding how consultants and capacity builders can integrate the assessment process into your own ways of working with client organizations. So can you talk about the assessment as a complement to the traditional or standard ways that you might engage an organization in doing their internal DEI?
Gita Gulati-Partee:

Sure. Thank you so much. I've had the pleasure of working with many organizations doing equity capacity building for social change, so working both with organizations and at the field level, really usually pretty long-term kinds of change processes, and that is always anchored in a comprehensive equity assessment where we look at our critical review of policies and strategy documents. We try to assess some sense of, get some feedback really about the impact of the organization and how other folks are experiencing the organization through some interviews and with external stakeholders.

And then really critically is that internal perspective and tapping the experience of staff and other internal stakeholders and really unapologetically prioritizing the perspective of staff of color or other folks who have marginalized identities within the organization. And so for that piece of the puzzle, for that piece of the comprehensive assessment, we've always used a survey as well as interviews or other kinds of things and it has been such a gift to have BB4C as a piece of that, not only as a huge time saver

for my colleagues and me while we're relying on the BMP team to do all the analysis and produce a really beautiful summary report that's very user friendly, user friendly to us as a consultant, user friendly to the client. It also then just allows us to do other things concurrently, so it's a wonderful time saver.

But even more than that sort of practical piece, it has been really helpful, I think, to separate ourselves as messengers from the message a bit. And that has been helpful to frankly just allow the client partner to absorb the information sometimes what can be difficult feedback or surprising feedback. And we talk about our assessment as holding up the mirror to the organization and that can be difficult, it can be difficult to receive the information that the mirror is showing. I don't know about you, but I have that experience every morning when I look in the mirror. Why is my mirror making me [inaudible 00:35:39] my clothes are too tight? It takes a minute, it takes a minute to remember that the mirror is not causing what I'm seeing, it is just the messenger. And so I feel like having that relationship with BB4C has enabled just the right amount of distance where we can then engage as partners with the client to really hear the feedback that's coming and that they need to hear.

I really appreciated Farah's language around the roadmap, that sort of focusing on the most critical information can help serve that roadmap function. We haven't yet gotten to the point where we're re-administering BB4C, but I'm looking forward to that because that's the other end of the roadmap. Let's actually track our progress and see how we did. And so I think that can be really, really helpful to you to have that system opportunity. And then also, as you've said Sean, we've had the opportunity really to do this with a cohort and while, like you, we're not benchmarking individual organizations against someone else, we want them to focus on their own development, it has been helpful for us as cohort facilitators to see patterns and to really know where we want to emphasize and build empathy and also problem solve together.

Sean Thomas-Breitfeld:

Thanks so much to each of you, and I want to get us into a little bit of a cross-cutting conversation now and I'm seeing some of the questions that are coming into the Q&A. I'm really grateful to, particularly Cameron and Olivia for responding to some of those in the moment. And so we'll be sort of going back and forth if there are questions that folks have in the Q&A that you really want to make sure get addressed by this panel, please do start putting those in as well.

And I want to start with a question for all three of you to weigh in on around the process that you've seen organizations move from commitment to taking concrete steps. And certainly interested in how BB4C has helped accelerate that. Also, what do you see as really working in terms of advancing real culture change in terms of the racial equity and inclusion inside of the workplace? Curious, anyone can start, but just curious what people's reactions are to that.

Annie McKay:

All right-

Sean Thomas-Breitfeld:

I'm going to ask Annie to start us off. Thanks.

Annie McKay:

I got it. I got it. I got it. Even as a social worker, I still am sometimes uncomfortable with silence on panels. So here we are. I think one of the things, I mean everything that comes in the report is actionable. Full [inaudible 00:38:30] is actionable. And I see a lot of organizations really get stuck when they have that mirror held up, like Gita said, and I think that with the BB4C assessment, that it includes, as Sean has mentioned and Farah's talked about, the resources, the strategies, the tools to operationalize change. It moves us from that analysis paralysis when the mirror is first held up and our clothes are too tight and it's like, what do we do? It moves us from that paralysis into, this is really actionable and here's how we do it, here's the roadmap.

And I think that what I've seen for orgs is that there isn't that initial stuck. They may get stuck in some other places and that's to be expected in a journey, but that sort of initial, we can get the momentum going so that it's not the fits and starts. That's one thing that I've seen.
Sean Thomas-Breitfeld:

Thanks, Annie.
Farah Council:

I can jump in. Two things I'm thinking about is just in our experience as an individual organization, it encouraged us, and this is before the fleshing out of a lot of resources that you have now, it really encouraged us to dig in and experiment with creating relationships that were about deep rapport and humanizing each other so that we could then have more difficult conversations to bring each other into awareness around power and positionality. And that was really transformational for us. And each time we bring new staff in, we kind of have to redo that, and then the COVID era is a whole other thing of doing that remotely. There's all kinds of just constant learning, begin and continue. So that's the individual piece.

And I would say that one thing that really is just standing out in my mind from our cohort experience was how powerful, I think Sean, you mentioned this, how powerful is to have peers in this work so that you A, don't feel alone, but then B, you can do other things like affinity grouping. Because when we see the barriers to this stuff, how do we unpack that, untangle it, start to chew on it, and creatively problem solve or address it? And I think with facilitation and support, and for us in our cohort as facilitators, we did a lot of creative brainstorming around the stuff we were seeing come up around the patterns.

You mentioned, Gita, about the patterns we were seeing, how do we work with that? How do we then step towards the organizations that might need support around that? But then also within the cohort, the affinity grouping helped begin to address some of the stuff that was happening under the surface to loosen it, to untangle it, so that then we could kind of come back, not hold that stuff so tightly. So that's a piece, I think, that is kind of a practice piece.
Sean Thomas-Breitfeld:

Thanks so much. And I just want to, because I'm seeing questions come in about the cohort experience, and so as BMP and the Building Blocks for Change team, our goal is for the assessment to be an accelerator and a tool for organizational change. And we totally think that, as you're hearing, cohorts are a really impactful way to accelerate this work across multiple organizations. And that's part of why capacity builders and consultants, like Annie and Gita, are so key and why we want to see more people integrate the assessment as one of the tools in the toolbox, whether you're working with an individual organization or with a cohort. And so I just want to be clear about how we see this as a tool, that it's not the whole thing. And so, Gita, I wonder if especially you could talk a little bit about the things that are beyond the assessment that you do that are really critical to helping organizations advance real change inside of the [inaudible 00:42:25] system.
Gita Gulati-Partee:

Yeah. And taking a cue from Annie, I'm going to answer a little bit more of my own question first and just say, one additional piece that I've really found useful to help move folks from commitment to concrete action is the disaggregation, and just sometimes seeing the gap, the surprising gap, not only around race, but we've also used the disaggregation by roles, so senior leadership and staff. That has been very motivating, I would say. Just want to really appreciate that.

The phases that you outlined, Sean, for you don't just see this as a survey, it's embedded within. In many ways, that itself kind of mirrors our overall process in the making meaning of overall assessment together. I get calls all the time from folks who say, "Can you come do an audit?" That's literally the language they use, and I don't do that. I think there might be folks who do that well, but I do see this as

requiring a container of some shared language and norms and relationships, again, in order to even receive the information that the assessment provides, and then to be able to do something with it, to have the beginning skills and confidence and courage to actually do something with it, to discern what the next steps may be, to build the capacities that are needed to move forward.

So, a comprehensive change process will look different for each organization depending on where they're starting and where they want to go. The assessment, I think, is an important anchor within a lot of opportunity for, again, just talking to each other and learning together and deciding together.

Sean Thomas-Breitfeld:

Yeah. Thanks so much. And I want to lift up in addition, part of the key role that we haven't really talked about is the role of funders because essentially funders made it possible for all of us to partner on these cohorts. And so I do think that, particularly funders who are building deep relationships with DEI consultants and capacity builders that have a set universe of grantees that they're trying to support, that sort of synergy between [inaudible 00:44:39] consultants or capacity builder can be really a great audience in terms of who might utilize the assessment in work with organizations on the ground.

A question did come in about if we've considered assessing gender and sexuality, et cetera, in addition to the assessment on race. And so I want to talk a little bit about why the assessment centers race and the way it does while also acknowledging the disaggregation that is possible. And I want to invite others to weigh in on this as well. So the assessment centers race and talks about race repeatedly in the survey. And the disaggregation that we can do can be on the basis of gender, on the basis of sexuality, as Gita said, on the basis of where people are situated in the organizational hierarchy.

So race is this larger system that people are interacting within, and based on their other elements of their identity, are having different experiences of how racially inclusive and racially equitable the organization may be, but the assessment itself is still going to be fundamentally about race equity. It's not going to be about gender or sexuality, it's that we're looking at the race equity through the lens of different gendered experiences. And I'm curious if anyone else has any sort of additional ways to describe that nuance because I do think that it's potentially complicated and I'm not sure that I'm explaining it in the best way. So that's good enough? All right.

There is a question on how is this tool different from a DEI audit? And Gita, you did mention that sometimes you're asked to do an audit. Can you just talk a little bit more from your perspective of what an audit is versus the fuller process that you like to take an organization through and how the assessment fits into that process?

Gita Gulati-Partee:

I'm probably going to be a bit more critical, because like I said, it's not something we do, but I think that when I hear that request, it's coming from a very sincere way of wanting to get to solution very quickly and has a little bit of a checklist feel to it to me. And again, I understand where that feeling might be coming from. I just don't think that's how this work really happens. I don't think that's how change really happens. So, I can't really speak about what that might look like in an effective way. My experience is just that that's not the best way to approach this work.

Annie McKay:

Sean, can I add-

Sean Thomas-Breitfeld:

Thanks Annie. Yeah. Go ahead.

Annie McKay:

Yeah, the audit, I mean in my experience when folks are asking for audits, they're often asking for an analysis of very technical elements, like what their employee manual might look like, policy review. And I

think when we're looking at the assessment, it is both sort of technical, it's also adaptive, right? Farah mentioned about relationships and the container building and the culture, and in my experience with audits, you're usually not getting information back around culture and relationship and some of those other really key components that BB4C gives you.

Sean Thomas-Breitfeld:

Thanks so much. Just trying to also track other questions that might be coming in. I'm curious if folks have any thoughts about having the sort of piece around, again we're not trying to benchmark, but it is useful as a capacity builder to see how different organizations respond to the assessment or what the results of each of the organization's custom reports end up looking like. Can you talk just a little bit more about the nuance of that? And I can certainly talk about why we're not trying to at this point do benchmarking, but if you have any cautions around that, around why people need to interrogate more deeply their desire to be measured against others when they're doing this assessment. What's problematic about that would be helpful to discuss a little bit. Farah, can I get you to start us off?

Farah Council:

Okay. So is the last part of that question the meat of it really about that desire to compare, to gauge yourself-

Sean Thomas-Breitfeld:

Yeah, I mean I want to acknowledge that there's some utility in being able to see across the cohort that there are these differences in each organization's custom report without feeding into this desire that I think is problematic for organizations to be measured against each other.

Farah Council:

Well, I mean I think when we're talking about doing decolonizing work or DEI work, we're really talking about checking the tendency to be competitive and to compete for resources, especially in the nonprofit world being pretty resource scarce. And so I think that in and of itself is just something to be mindful of. And then I think there's so much learning to be had by being in conversation with other organizations around the barriers that they're facing, but also maybe the things that have gone well. I think the thing that stands out most for me, and this is how I tend to work also is I look at patterns.

And so Gita, when you talk about patterns, I think that's where our learning is, that's the learning edge of field is what are the patterns? And I know that for us in our cohort, one of the things I remember was around the patterns around leadership and leadership buy-in, right? Where there is leadership buy-in for this work, what space does it create for it versus when there is resistance at leadership level, what are the impacts that has? And so when I think of digging into that question about comparing each other, I would say first we have to check that tendency no matter what and make sure we're not perpetuating or propelling the tendency to compete against each other and really work on collaboration?

But then beneath that, really looking at where the patterns of barriers are and where that shows up. And I know a lot of times it's leadership but also leadership intersecting with positionality and whiteness is definitely a tendency that we see and the barriers that are created by leadership that isn't doing or hasn't done its work. And then the other thing that I'll say that was a real learning through this process for me and our team was how important it was for leadership to have their own spaces to do their work aside from their staff and their team. Because I think this stuff can be messy and challenging and uncomfortable and there are lots of risks for leaders to be that vulnerable. I just want to acknowledge that piece too, my handoff.

Sean Thomas-Breitfeld:

Thanks. Annie, I know you have some thoughts on this.

Annie McKay:

Yeah, I mean I think we need a second hour and a therapist to totally unpack that competition piece, but I'll say this, I think in addition to what Farah started with, I think also this is lifelong work. And I think that that notion to compare will lead people to say like, "Oh, boy, we're just a step ahead of Organization X. We can rest." That, I think is where the competition and sometimes when I'm working with groups and they're like, "Well, where is this group at?" Let's pay attention to our own house. We need not worry where anybody else is at, let's just focus on this right here and we'll just keep going regardless of where anybody else is at.

Gita Gulati-Partee:

Yeah, one of the reasons I was so drawn to BB4C is your developmental frame. It is least developed and most developed, which really, to me, emphasizes the lifelong nature of the work. And also that any comparison is to self, right? The call is coming from inside the house. Where is it coming from? That's what we need to focus on for ourselves.

And again, as you take it over time, those things could shift. Based on how we learn, we might in fact rate ourselves lower as we go on something and that's where we then need to put attention to. And so that developmental focus to me is actually critical to this particular tool. I also love, because of, as Farah was describing, all the nuance that's now been built into it with the four capacities and the three focus areas, it is just the opportunity to lift up where there's paradox. That's really what's so exciting is we're most developed on something here with voice, but least developed on something here of conversation, how can that be? Well exactly, that's where we need to have discussion, right? That's where we need to tease out more. So it helps, I think, really point an organization to what are the essential conversations you need to have now?

Sean Thomas-Breitfeld:

Awesome. So a question did come in the Q&A around, how is power addressed in the assessment? And so I want to pose that to you and also acknowledge that, as Farah would be able to tell you, some of the names of the capacities have changed over time. So the voice capacity was called voice and power in the version of the assessment report that Farah's organization received, and we changed it to voice, but we didn't actually change questions in the survey about it. So that whole capacity is fundamentally about power dynamics, but curious what else you have observed in working with organizations or having done the assessment in the case of New Mexico Voices around how power gets unpacked through this assessment process?

Farah Council:

I'll just say very briefly, I think the level of nuance that is there now allows you to unpack power more directly because it'll show up in the bullet points and I think your team will be able to pull out, especially maybe where the least developed pieces are, but in leadership, obviously there can be a lot that comes out around power. We didn't... Now I'm compelled that our organization needs to redo the assessment now that it's several years later, which we'll do because I would actually love to see this from our perspective because I think you'll know it once you see the results around where power is showing up or where there's a power imbalance. But I don't feel like I have much more of an intelligible answer around that. Hopefully Gita can chime in.

Gita Gulati-Partee:

Again, I think the disaggregation really helps just across the board, across all of the areas, but it's where those places, the conversation starters around these developed areas are all about helping to expose how power is operating, and that's the essential conversation in equity work.

Sean Thomas-Breitfeld:

Thanks so much. And I want to just acknowledge that Annie is always doing this work with organizations and had to lead some work with a client organization, so that's why they had to jump a little bit early. But

thanks to everybody for joining us for this conversation today. Want to again thank our panelists, Annie McKay, Gita Gulati-Partee, Farah Council, and want to thank the whole BMP and BB4C team for getting us to the point of being able to launch this assessment tool because it has been in the works for a long time and we're really excited about it and really excited to partner with organizations directly using it, also to partner with capacity builders and consultants in using it with organizations you're working with and in cohorts that you might be facilitating.

Again, we have been recording this webinar. Everyone who registered is going to get a follow-up email next week with a link to the recording, a transcript, all of that information. I want to encourage folks to go to the BMP and BB4C websites for more information, and also the Director of BB4C, again I'm filling in for Mercedes, and she wrote a phenomenal blog post that's on the BMP page about this assessment tool when we launched it at the end of January. So I hope that folks will check that out as well.

So thank you, thank you, thank you for joining us today and thanks everybody for the commitment to making nonprofit organizations more inclusive and equitable workplaces. Take care.