Community PARTNERS®

OUR EQUITY & IMPACT ROADMAP

2022-2026

"Racism and sexism, misogyny and homophobia, they're so visible. They're out in the open. When they're visible, it's a lot easier to deal with them."

\- Dolores Huerta,
  American Labor and Civil Rights Leader

GOOD
INFLUENCE

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Acknowledgements

Acknowledgements

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From Our Leadership

DEAR PARTNERS,

We all joined the team at Community Partners because we believe in the power of our model, which is to provide a fiscal home, critical support, and strategic partnership to organizations seeking to improve the lives of people in our communities. The vast majority of our staff, projects, and the communities we serve are Black, Indigenous, and People of Color (BIPOC). Therefore, our commitment to our staff, project leaders, and industry must explicitly and deeply embed racial equity.

In the Spring of 2022, we embarked on a journey to center equity and impact in our work. We enlisted the help of Good Influence Consulting (GIC), an equity-centered consulting firm. GIC facilitated listening, meaning-making, and strategic planning sessions that enabled our staff and board to hear the candid feedback, advice, hopes, and fears of our core staff, project leaders, industry peers, and funders. During these sessions, we heard about our strengths as an organization, and we also heard hard truths that will help us become better partners to our projects and community. Eighteen of our board and staff members used this wisdom to develop this Equity and Impact Roadmap, which outlines our new commitment to staff, project leaders, and industry partners.

At the heart of our commitment is a humble acknowledgement that we can and will be better partners to our community. Being better partners means being better listeners, truth tellers, supporters, and advocates. As we implement this Equity and Impact Roadmap, we commit to doing so in collaboration with you, our community stakeholders. We look forward to learning and growing together.

In community,

Alicia Lara, MPH, President and CEO
Helen B. Kim, JD, Board Chair
Ange-Marie Hancock Alfaro, PhD, Chair, Board Equity & Impact Committee

Our Mission

At Community Partners we envision an equitable, thriving, & inclusive civil society.

Our mission is to accelerate ideas into action to advance the public good. For 30 years, hundreds of individuals, groups, foundations and other institutions have worked with Community Partners to create new nonprofit projects, establish coalitions, and manage major philanthropic initiatives to benefit communities.

Today, Community Partners supports nearly 200 of those creative solutions. These efforts offer a panoramic view of the social innovation taking place across the region and beyond. Our projects focus on a variety of strategies, such as using the arts for self-expression among youth, leading anti-racist community organizing, addressing food justice, and building queer-affirming movements.

Our Journey

Who We Engaged

We embarked on a journey to deepen our commitment to equity and impact for our staff, project leaders, and for the philanthropic and fiscal sponsorship industries. As part of this process, we listened deeply to the perspectives of over fifty-six staff, seven board members, five project leaders, and five industry thought leaders through surveys and interviews.

What We Discovered

Our staff feel that we prioritize equity and impact when we uplift the voices of BIPOC staff and projects, but our systems make it difficult for people to connect, collaborate, and work efficiently. Historically, we have not made decisions about staffing and finances transparently or communicated our commitment to racial equity and justice authentically and meaningfully. These organizational behaviors have eroded trust.

Our project leaders feel that we provide an important backbone that enables them to focus more on their core mission, but they do not feel that we prioritize equity and impact by deeply understanding, efficiently addressing, and advocating for their needs. This was particularly true for BIPOC-led projects.

Our industry leaders want us to prioritize equity and impact by leveraging our positional power, reputation, and relationships to advocate for projects led by and centering BIPOC communities.

How We're Taking Action

Eighteen diverse staff and board members, known as the Equity & Impact Braintrust, spent four months developing a strategic planning roadmap that details our goals, roles, and timelines for deepening equity and impact for our staff, our projects, and our role in the philanthropic industry. This high-level document highlights key aspects of our Equity and Impact strategic plan.

Glossary

For your reference, our equity and impact goals use the following terminology and acronyms throughout this document:

Historically Marginalized Identities:
Centering identities that have historically or currently been marginalized from decision making. For example, this might include those who identify as LGBTQ+, transgender/gender non-conforming, disabled, immigrants, limited in English proficiency, and women/non-cis men.

BIPOC:
Black, Indigenous, and People of Color. Throughout our goals, all reference to BIPOC folks is through an intersectional lens that considers ethnicity, ability, gender identities, and other dimensions of identity.

Equity at Community Partners (synthesis of staff definitions):
Uplifting the voices of BIPOC individuals, ensuring equal and fair opportunity for all individuals, and serving BIPOC led partners and projects.

Impact at Community Partners (synthesis of staff definitions):
Increasing transparency throughout the organization, and defining clear and quantifiable positive impacts on the quality of life for those we serve.

Our Equity and Impact Goals

Equity and Impact for Our Projects

- Supporting & Meeting Project Leader Needs & Expectations

- Creating a Mutual Agreement Policy & Set of Practices with Projects

- Understanding the Organizational Context & Needs of Our Projects

- Establishing Flexible, Clear, & Equitable Compliance Policies

Equity and Impact for Our Industry

- Developing a Framework to Guide Advocacy Decisions

- Building Communications Strategy to Support Advocacy

Equity and Impact for Our Staff

- Ensuring Psychological Safety for Staff

- Identifying Organizational Values for Equity and Impact

- Strengthening Staff Capacity & Systems

Supporting & Meeting Project Leader Needs & Expectations

What We Discovered

Our project leaders don't feel they have a voice in shaping the services and supports we offer. We need a streamlined method to regularly communicate with and hear feedback from our project leaders in order to proactively engage and identify areas for improving and reinforcing our supports and services.

How We're Taking Action

To achieve this goal, we will launch an annual Project Leader Satisfaction Survey designed to identify how clear, consistent, flexible, and equitable our supports and procedures are for project leaders. Our goal is to create a culture of feedback that centers the needs and experiences of our projects. Each year, we will analyze the Project Leader Satisfaction Survey data to measure our performance, identify our most effective supports, and propose new or enhanced supports based on project needs.

"I think it's important for Community Partners to understand how projects view working with them. During my time as a project leader, there was no mechanism to give direct feedback on my experience working with staff."

-Community Partners Project Leader

Creating a Mutual Agreement Policy & Set of Practices with Projects

What We Discovered

Our projects don't always know what to expect from our team, services, and supports. As an organization, we need a clear definition of efficient and consistent customer service, and want to ensure our project leaders have a voice in shaping the definition.

How We're Taking Action

We will develop a mutual agreement policy between Community Partners and our projects that defines our standards of care and expectations for our partnerships. Our goal is to have 75% of active projects report consistently receiving high levels of responsive customer service and care and 75% of staff report consistently providing this level of service and care.

To achieve our goal, we will outline a process for program directors and project leaders to reflect on and recommit to the mutual agreement policy. We will conduct research on best practices for supporting staff and project leaders to uphold our new standards of service and care. We will also implement a training and education program to support staff in adopting these new standards.

"How can Community Partners play more of a support and coaching role?"

-Community Partners Project Leader

Understanding the Organizational Context & Needs of Our Projects

What We Discovered

The projects we serve face evolving challenges and opportunities that shape their organizational goals and ability to execute on their mission. We need a streamlined method for understanding and responding to the unique ecosystems in which our project leaders function.

How We're Taking Action

We will revise our Project Leader Organizational Self-Assessment Form to include questions that help us better understand the context, challenges, and aspirations of our projects. Our ultimate goal is to use the data to support projects in reaching their long-term organizational goals. We will know we have achieved this goal when at least 75% of active projects report feeling our staff understand their long-term goals, external context, and challenges.

We will use the results from the organizational self-assessments to identify trends and common needs among projects and, ultimately, refine our supports and approach to customer care. On an annual basis, we will ask project leaders to update their organizational self-assessment forms based on changes to their structure, capacity, and/or goals.

"I think some of the support needs to be specialized...What we needed when we started was very different from what we needed toward the end of our time at Community Partners."

–Community Partners Staff Member

Establishing Flexible, Clear, & Equitable Compliance Policies

What We Discovered

Our job is to ensure projects are compliant and thriving, but we don't always strike the right balance between compliance and compassion or structure and flexibility. This is in part because our field operates within nonprofit, philanthropic, and government systems that have historically prioritized compliance over equity and impact. Therefore, we need to think innovatively and equitably about our compliance policies.

How We're Taking Action

We will revise our compliance policies to ensure they are clear, flexible, and equitable in order to balance the need for legal compliance with the need to provide caring and equitable support to our projects. Our goal is to have at least 75% of active projects and Community Partners staff report feeling satisfied with the clarity, consistency, flexibility, and equitability of our policies and procedures.

To achieve this, we will complete an audit of our current policy handbook to identify policies that are for internal compliance or HR preferences and those that are for legal compliance. We will recommend adjustments to our policy handbook accordingly. We will also audit and refine our onboarding training for projects to more effectively onboard project leaders and staff to our policies and procedures.

"At a certain point, it felt like we were a burden to Community Partners. They often took a harsh, punitive approach that was very compliant driven."

-Community Partners Project Leader

Our Methods for Measuring Success

- Analyze project and staff interview and survey results to measure satisfaction with our supports

- Conduct interviews with project leaders and staff to learn about experiences with respectful and timely customer service and standards of care

- Analyze the Project Organizational Self-Assessment Forms to understand each project's long-term goals, context, and challenges

- Discuss impact and course corrections during team meetings, one-on-one conversations, and in interviews throughout this process

Executing this Plan with Equity and Inclusion

- Prioritize seeking advice from those who reflect the following backgrounds: project leaders who serve and come from historically marginalized communities, experience the most compliance and regulations, and/or require the most flexibility

- Seek input and consultation from staff who liaise with project leaders (around contracts, grants, finance, and HR) as well as staff who come from marginalized backgrounds that mirror the communities we seek to serve

- Focus on understanding and meeting the needs of projects that are led by and serving BIPOC or other historically marginalized communities

Developing a Framework to Guide Advocacy Decisions

What We Discovered

The world of philanthropy and public funding has established rules, rituals, and requirements that enable organizations with more privilege, access, and resources to thrive. For instance, research--as well as our experiences with our project leaders--tell us that white-led organizations receive less scrutiny and greater funding than Black-led nonprofits, which are often viewed as more risky investments. Therefore, we need to see more equitable funding and access for BIPOC-led and/or serving organizations.

How We're Taking Action

We will develop an advocacy framework for leveraging our positional power to advocate for private and public funders to center equity and impact in their approach to grant-making and contracting. We will know we have achieved this goal when at least 80% of our BIPOC-led and/or serving projects receive unrestricted philanthropic dollars and 10% of our intermediary contracts demonstrate equity-based reforms.

To achieve this, we will conduct listening sessions with our project leaders to understand the barriers faced by BIPOC-led organizations seeking funding. We will use insights from these listening sessions to develop an advocacy framework to provide guidance and guardrails on when and how we advocate for or against contracting and grant-making practices. We will also explore partnering with industry peers to publish a thought leadership report uplifting best practices.

"My hope is that Community Partners uses their positional power to advocate for more freedom for BIPOC-led nonprofits."

–Industry Thought Leader

Building Communications Strategy to Support Advocacy

What We Discovered

Our project leaders and industry peers want to know where we stand on key issues that impact our projects, communities, and industry. As part of our new commitment to engaging in advocacy, we need to develop public advocacy positions that reflect the needs of our stakeholders and our commitment to equity and impact.

How We're Taking Action

To be more responsive and relevant leaders, we will use our brand and platform to openly and thoughtfully advocate for equity with the intention of influencing our public and private funders to follow suit. We will know we have achieved this goal when we see a year-over-year increase in our media activity, coverage, and participation in thought leadership forums. We will also ensure at least 75% of staff and projects feel we are taking a public position on issues and dynamics that are key to our organizational values.

To achieve this goal, we will draft a decision-making protocol and communications strategy for when and how we take public stances shaped by our values, and advocacy framework. We will also audit our communications infrastructure, vendors, and media partners, as well as tools and technology to consider how we can strengthen our internal operations and capacity to achieve this goal.

"Equity work will require us to influence the field. I think it's important for you to clearly identify where you want to influence, and then build out internal advocacy capacity to do so."

–Industry Thought Leader

Our Methods for Measuring Success

- Look for and record evidence of equity, accessibility, and reduced administrative burden for intermediary and fiscally-sponsored project contracts

- Increase restricted and unrestricted funding for BIPOC-led and/or serving projects or partners

- Grow the number of advocacy partners and coalitions we work with to promote equity in the philanthropic and public sectors

- Audit and track public records, statements, and press releases that clearly articulate our position and organizational values

- Survey project leaders and staff to understand perceptions of our public voice and role supporting the communities we serve

Executing this Plan with Equity and Inclusion

- In our audit and interviews, we will hear from BIPOC project leaders who report having inequitable contracts and grant agreements, as well as BIPOC and other historically marginalized staff who work closely with our funders and partners.

- Staff of varying seniority levels will advise our work, particularly staff who work most directly with projects and/or interface with our philanthropic partners.

- To build internal capacity while also ensuring manageable workloads, we will bring needed resources, support, expertise, and capacity to our staff as we build out our advocacy and communications functions.

Ensuring Psychological Safety for Staff

What We Discovered

As an organization, we have not always led with transparent decision-making, which has eroded trust and psychological safety for staff, particularly BIPOC women. We need to build trust and strengthen psychological safety for staff, particularly BIPOC women and historically marginalized folks.

How We're Taking Action

We will create systems and practices to foster stronger inclusion, transparency, and communication around decision-making, conflict resolution, and accountability. Our goal is to retain over 75% of BIPOC and historically marginalized staff and to see at least 75% of staff report that they experience transparent decision making, conflict resolution, and accountability.

To reach this goal, we will define our expectations for psychological safety and create an affinity group program to establish safe spaces to deepen dialogue and understanding. Our annual Staff Satisfaction Survey, along with town halls and dialogues with managers, will help measure our progress toward meeting this goal.

"Trauma and leadership trickle down. As leaders, you have to set the tone for any interaction or engagement. Our frontline staff needs to feel supported and to know that when they come to talk to us, we can get behind it."

–Community Partners Staff Member

Identifying Organizational Values for Equity and Impact

What We Discovered

While we have systems, policies, and procedures, we do not have updated values that can shape our organizational systems, decisions, and behaviors. As a result, our staff have experienced a lack of clarity regarding how we center equity and impact in our work. Therefore, we need to identify organizational values that guide our people, decisions, and our internal and external work.

How We're Taking Action

We will update our organizational values to clearly articulate our commitment to equity, impact, and responsibility (fiscal and otherwise). Our goal is to ensure our organizational values are accessible to all members of our community and at least 75% of staff report that we display a clear and consistent commitment to the articulated values of equity, impact, and responsibility.

To reach this goal, we will update our values statement to emphasize our commitment to diversity, impact, equity, and organizational sustainability. We will also develop an implementation plan to support staff who are operationalizing our values in our roles and key processes.

"I would love to see a defined mission statement with linkages to our internal work in terms of who we are and how we work together, and external work in terms of what projects we support and how."

–Community Partners Staff Member

Strengthening Staff Capacity & Systems

What We Discovered

Our team often feels over-extended and lacks a system to discuss and address workload manageability. Our staff also want greater transparency for budgeting and financial decision-making. We need a structure for staff to understand how we are strengthening capacity and improving efficiency as well as making values-based decisions about budgeting.

How We're Taking Action

To address these needs, we will identify the necessary staffing structure and technological systems to support our team while executing our mission and commitment to equity. We will also provide greater org-wide budget transparency and commit to values-based, decentralized budgeting. These conversations will take place within departments and across our organization. Our goal is to see that at least 75% of staff feel their jobs are satisfying, manageable, impactful, and that our organization prioritizes equity for staff.

To reach this goal, we will create and implement a protocol for employees and managers to discuss workload distribution and manageability. We will also develop a roadmap for decentralizing budgeting to empower departments to build and manage budgets and make informed financial decisions.

"I feel supported when my supervisor checks in with me and helps me problem-solve. When my ideas and questions are heard, prioritized, and addressed."

-Community Partners Staff Member

Our Methods for Measuring Success

- Develop and employ communication and accountability norms, guidelines, and expectations for engaging in truth-telling, productive conflict, and conflict resolution

- Analyze perceptions of sustainability, efficiency, equity, and retention based on staff survey data, exit/stay interview data, and town halls

- Update performance management goals and management system to align with the Equity and Impact Roadmap, staffing structure, and technological systems

- Develop and implement organizational values that reflect stakeholder input

- Analyze our Staff Satisfaction Survey

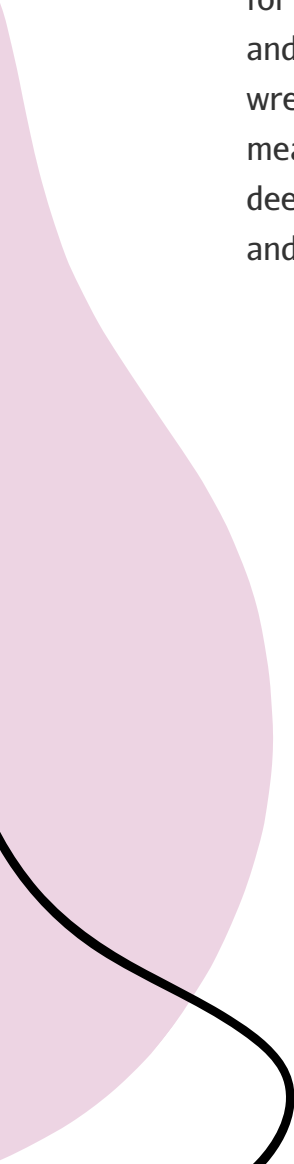# Executing this Plan with Equity and Inclusion

- Psychological safety and inclusion will be addressed throughout the process particularly for BIPOC and historically marginalized folks, who report feeling less safe and included in decision-making.

- The development and rollout of any changes to staffing roles, structures, technology, and resources will require transparent and trusting feedback loops among leadership and staff.

- We will build internal capacity to create and operate our systems while remaining flexible and recognizing constraints in capacity or personnel that require us to outsource work.

Concluding Thoughts

Amid a pandemic and in the wake of California's largest racial justice uprising, Community Partners began a journey to deepen our commitment to equity and impact for our staff, project leaders, and industry. We listened to the full hopes, hard truths, and bold recommendations of our projects, staff, board, and industry peers. We wrestled with difficult choices, developed actionable goals, and decided how we will measure the change we seek. Our hope is that this Roadmap enables us to work in deeper partnership with all our stakeholders toward creating an equitable, thriving, and inclusive civil society.

"Justice is what love looks like in public, just like tenderness is what love feels like in private."

- Cornel West,
Black scholar and activist