MOVEMENT
TAPESTRIES

A Change Management & Deep Equity Primer: What, Why, How & Nuance

By Sheryl Petty, Ed.D.

CONTENTS

Equity-Embedded Change Management™ is a Worthwhile "Labor of Love"

– A Foreword by Marcus Walton

> **"Love takes off the masks that we fear we cannot live without and know we cannot live within. I use the word "love" here not merely in the personal sense but as a state of being, or a state of grace - not in the infantile American sense of being made happy but in the tough and universal sense of quest and daring and growth."**
> **~ James Baldwin**

This is the first time I have ever shed tears during the process of writing a foreword. The emotions accompanying this topic remain alive for me as I reflect on years of previous attempts to gain credibility for the study of the critical space where racial equity practice overlaps with organizational change management. With a deep sense of gratitude and clarity, I thank Sheryl Petty of Movement Tapestries for her commitment to bringing forward this dynamic articulation of observations and analysis about what she terms "equity-embedded change management™" - insights derived from a lifelong career of stewardship, service for others, and progression along a personal path of discovery, healing and self-actualization.

Over the course of my three-year tenure, I have engaged the GEO board & staff in what Baldwin referred to aptly as a "tough and universal sense of quest and daring and growth," confronting any barriers to authenticity that may diminish the quality of our state of being. Through a process of deep transformation, we have developed proficiency in leading-edge change management practices to ascertain a nuanced approach to understanding and responding to how disruption happens. We have examined the impact of change on individual self-perception, relations between individuals, and interactions between individuals with both equitable and inequitable systems & structures. And, like so many valuable enterprises, sometimes it has been a painful process - a true "Labor of Love."

Today, GEO enters its 25th year, embarking upon a strategic planning process to identify its optimal contribution within the existing ecosystem of networks supporting the evolution of leadership within the philanthropic sector. As we explore the most effective ways to leverage philanthropic power for social progress, we are conscientious of the myriad ways in which the conditions defining the current era are characterized by change.

As a result, we are partnering in a manner that is different from GEO's historic way of developing publications in hopes to introduce dynamic practice leaders as well as an emerging body of work that promises to improve our effectiveness as grantmakers, managers, and organizational leaders.

History teaches that regardless of the industry, change is a force that is simultaneously generative, stimulating creativity and innovation, and disruptive, destabilizing or re-ordering existing conditions. We understand this essential truth and appreciate the power of change to reveal new possibilities for shaping what we are collectively becoming as a community.

This project is inspired by the generosity, enthusiasm, frustrations and lessons accrued by several generations of hard-working families, civic & organizational leaders, social influencers, and community members of all backgrounds who have sought to improve living conditions globally; especially within the neighborhoods and towns that comprise this nation. Without them committing lifetimes to the pursuit of fairness, peace, equity, and justice for all people, philanthropy could not fully appreciate the opportunity in this moment in history to ensure that the least regarded among us are treated with dignity and respect as we cultivate conditions for collective thriving.

Our hope is that any experience of suffering, doubt, fear or sacrifice by our predecessors is given more meaning and value through the collective examination of the process of change, studying its individual components, and developing competencies for effective leaders to facilitate the transformation of systems and organizational structures to advance prosperity for the greater good.

Despite prevailing narratives of polarization and historic societal discord, the truth is that we have been worse off before as a nation, and we have made progress at different points in our shared history. To this end, we believe that NOW is the time to prioritize transformation, when we have globally acknowledged the ways in which people (positional leaders), systems (social

institutions) and structures (companies & organizations) have combined to create and reinforce through inequitable decisions - codified as rules, laws and policies - the conditions that institutional philanthropy endeavors to improve.

Through this era of social awakening, we can meaningfully facilitate a process of reckoning that promotes the recovery and repair required to generate trust & confidence in the people and institutions of this nation, and restore the essential social infrastructure that sustains communities.

The undeniable truth is that change is ever-present for us all. Either we can choose to resist it, which will prolong its persistence, or welcome it, allowing access to any opportunities for thriving that may be inherent within its unfolding.

We invite you to wrestle with the observations and experiences offered by Sheryl Petty in this publication and use it to pivot with us from an emphasis on increasing awareness to implementing strategies, from convening discussion to coordinating mobilization, and from simply celebrating our collective awakening to facilitating our collective reckoning.

On behalf of the GEO community and all the leaders of change across the generations, I thank you!

Unconditionally,

Marcus Walton
President & CEO
Grantmakers for Effective Organizations

Acknowledgments

I am grateful to those who inspired this document. First, to the organizational clients and peer consultants (many of whom are Deep Equity[1] people) who often asked questions about my approaches to change processes and equity – i.e., *What are we doing? and Why?*

I want to also acknowledge the thought partners and colleagues who led to the development of this work and informed my thinking and approaches over the years. I worked with Singhashri (Kica) Gazmuri in the late 2000s in building the *Equity-Driven Systems Change (ESC) Model* publication. Her gifts as a change management consultant and practitioner are in the top 3 of anyone I've ever seen. Working with her was a great joy and boon to my practice. She created most of the facilitation guides in that publication and I created the overall model and rubrics, with thought partnership from education equity consultant Ed Porter.

I was at a talk or convening sometime in the 2000s where education equity thought leader Jeannie Oakes (UCLA) was speaking. She mentioned something about the relationship between the structural, technical, cultural and political aspects of shaping and transforming institutions. She gave language to what was not yet in sharp relief and it informed the way I think. National Equity Project uses the term "relational" in their work. The combination of these approaches has really influenced how I talk about the aspects of organizations, systems, and change management over the years.

I want to also offer acknowledgement and appreciation for early conversations and thought partnership from Mark Leach and Natalie Bamdad at Change Elemental (formerly Management Assistance Group, MAG), who engaged in dialogues several years ago with me about the potential for such a publication. After having my private practice for some years, I was recruited by Change Elemental in the early 2010s to help build their formal equity practice. It was there that I coined the term and approach to "Deep Equity."[2] We sketched potential outlines, talked about potential audiences, and ultimately put the publication aside when I decided to return to my private practice after a number of years in partnership with Change Elemental. We agreed that I would continue writing and take the material in my own direction, based on my own practice, in keeping with my passions to make this content more widely available. Some of this material draws on those conversations, some is newer, and some is from my previous work. Other products

PART 1

INTRODUCTION:
Purpose, Impetus, Audiences & Format

Purpose

This publication is **focused on supporting social sector organizations, philanthropy, the equity capacity building field, and other change makers focused on Deep Equity**[3], in furthering their understanding of and capacity to advance equity-embedded transformation. The function of this publication is to continue to support the field, serving a *catalyzing* as well as *integrating* function to **unlock some of the most intractable areas** in embodying Deep Equity in this era of social systems change. The hope is that the fields we work in are significantly enhanced as a result of this effort, well into the future.

Much of this publication is primarily focused on unsticking long-standing stuckness in systems. For that reason, it will not necessarily address all the aspects of short- and long-term change processes. It is designed to help deepen the ability of the philanthropic, organizational development, non-profit and capacity building fields (and beyond) to advance and embody Deep Equity.

Impetus

Some years ago, I was working with clients on equity transformation processes who kept having questions about what we were doing, why, where we were going, etc. This is common in any org transformation process, but (as you all know) it is intensified in equity-based processes because of the heightened emotional, cognitive, energetic, etc. weight and intensity of the work, alongside the emotional, energetic, cognitive and other demands that also come along with more general transformation processes (without equity embedded).

Additionally, I was working and engaging with consultants in various parts of the field. Conversations with consultants began to echo questions that clients raised – i.e., about *what*, *how* and *why* I do things the way that I do. The feedback from clients and peer consultants (even deep equity consultants) was similar: *this is unique/unusual; what are the assumptions behind it; how do I get more; etc.* Prior to this, I thought my approaches to institutional transformation were *common*. These conversations led me to the conclusion that there could be a valuable offering to the field of these approaches.

Since the proliferation of equity providers has grown significantly with the increased awareness of racialized structural inequity, many of these approaches may have become more common. Still, even in the last two years, I hear much of the same feedback and many of the same grateful and inquisitive reactions from clients and peer consultants, such that a publication still seems like it would be helpful.

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[3] See for example: "*Systems Change & Deep Equity: Pathways Toward Sustainable Impact, Beyond "Eureka!," Unawareness & Unwitting Harm*," S. Petty and M. Leach, Change Elemental, 2020; and "*Seeing, Reckoning & Acting: A Practice Toward Deep Equity*," S. Petty, 2016.

In trying to describe the journey and what clients could expect along the way in an equity transformation process, a couple things happened: 1) I realized a larger/broader publication could be beneficial that could answer client and consultant questions more comprehensively, and in the meantime, 2) I created ad hoc/temporary powerpoints and other more limited material to answer questions at a high level. This publication is the amalgam of those efforts, along with learning from subsequent work since those early conversations began.

Audiences

This document was designed to address recurring questions I heard from both organizational clients and peer consultants (many of whom are Deep Equity[4] people) who often asked questions about "*What are we doing? Where are we going?*" or "*Why are we doing this, this way*?" Many asked "*How is this different from XX or YY or ZZ?*" or what I would call more *generic* approaches to "change" and "organizational development."

In working in, consulting to, training, coaching, and mentoring organizations, leaders, networks, and peer capacity builders across the U.S. and internationally – a similar set of questions and solutions continues to arise. I began crafting an array of approaches and tools to answer and guide cross-sector field participants in understanding how to advance the complexities & nuances of **"Equity-Embedded Change."**

This publication is for both:
- **Actors who often/frequently default to white dominant[5] norms:** This can (at times) be many of us and includes those who have "traditional" ways of approaching organizational change management that (consciously or unconsciously) omit, bypass, ignore, trivialize and/or don't know how to skillfully attend to the nuances of race, gender, power, privilege and other dimensions of difference which influence how we see, think, analyze, vision what's possible, reflect, prioritize, make meaning, and assess "progress" or "impact."

- And **equity-minded actors** who may have an emerging or unclear sense of how equity (and Deep Equity, in particular) should impact *every aspect of change management* practice with organizations.

In my nearly 30 years of being trained and working in the fields of equity, education, organizational development, and systems change, I learned that what I thought was normal in approaches to systems change, organizational development, strategy development, process design, and facilitation – were *not* necessarily 'normal' or 'common' even for very equity-minded consultants and organizational practitioners.

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[4] See "*Systems Change & Deep Equity: Pathways Toward Sustainable Impact, Beyond "Eureka!," Unawareness & Unwitting Harm,*" S. Petty and M. Leach, Change Elemental, 2020; and "*Seeing, Reckoning & Acting: A Practice Toward Deep Equity*," S. Petty, 2016.
[5] I.e., those operating frequently from white and/or male dominant habits, who may or may not be 'white' and/or 'male.' See for example "*White Dominant Culture & Something Different*," Adapted from Tema Okun and Kenneth Jones.

It took me a long time to learn this and notice it with my work with consultants and organizations over the years. This publication is in response to both clients as well as equity-minded organizational development consultants who asked *very similar* questions about how I was approaching change processes, and expressed similar forms of marveling.

Note that I am also focusing largely on **organizational change,** and not networks/ alliances or other cross-institutional bodies. Though much of this content may be appropriate in those contexts as well, this publication was not geared toward them.

This publication will also benefit **universities, colleges** and **other organizations** who train people in organizational development, equity and/or systems change, (though any uses of this publication for training would need to be undertaken in partnership with the author). It will also benefit the **philanthropic** world of those who fund such organizations, change management and/or equity practitioners, practitioner cohorts, and networks, locally, regionally, nationally and globally. It can support such funders to deepen their understanding of what equity-embedded change actually takes, and hence, what it will cost to fund and support for depth and duration. The practices and approaches described in this document could also (of course) apply to philanthropic institutions themselves, the equity practitioners within them😊, and the consultants they hire to support their internal and external equity transformation and capacity building work.

I have learned that many consultants and other change agents – (even BIPOC and equity-minded folks) – have been trained (consciously or unconsciously) in white (and/ or male) dominant approaches to organizational development. Further, I have also learned that many equity practitioners and equity consultants *are not necessarily change management consultants*. The remarkable skills, approaches, foci, expertise, knowledge and transformation areas of equity consultants *may or may not include* change management – i.e., the process of institutional change over time. This document seeks to address this circumstance, particularly *with equity embedded*.

[For those who desire a bit more detail, I am tiering **audiences** out here:

Equity Practitioners

(consultants, organizational, community)

Change Management Practitioners

Our Sweet Spot!
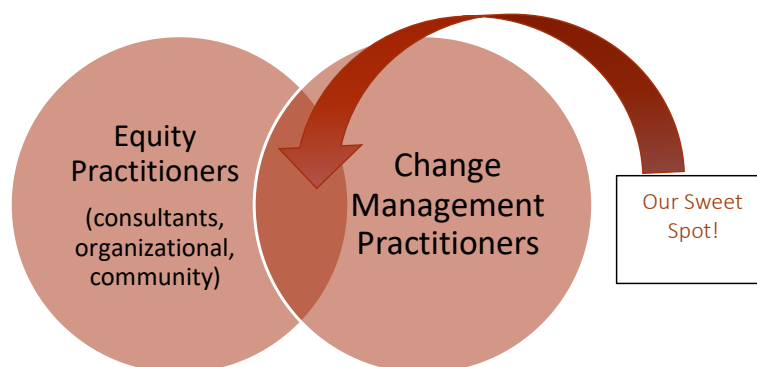
1. Consultants, organizational and/or community-based change agents who may use traditionally **white and/or male-dominant mindsets** and dispositions to design, vision, and enact change management processes (*who may or may not be 'white' or 'male'*) – who have begun to ask questions about what it might mean to embed or have been working to embed equity into their approaches.
2. **Equity-minded** actors (consultants, organizational and/or community-based change agents) who may or may not be equity consultants, but bring *equity sensibilities* and do *not* conduct *equity change processes*.
3. **Equity consultants or institutional equity change agents** who focus on:
   a. some strands of embedding equity into institutional functioning (e.g., via training, or board development, or leadership, or HR, or programs, etc.); or
   b. supporting organizations to embed equity into the *totality* of institutional functioning over time (inc. structures, processes, systems, roles, board/ trustees, staff, relationships, org culture, community/field, finance & investment, evaluation/metrics, etc.) – i.e., change management.[6]]

All of these audiences may have also been running into roadblocks and challenges in their work and practice that are confusing or otherwise intractable, and hence may have interest in this publication. Note that I will move in and out of talking to each of these audiences.

After several years of developing ad hoc and piecemeal answers to frequently-posed questions from many clients and equity consulting peers, and offering aspects of this document as a regular way that I approach consulting – it became clear that it was time and might be helpful to offer something substantial to the field, for folks to benefit from more broadly, to riff off of, innovate with, and *demystify* some of my approaches to **catalyzing change**. (I use this term "catalyzing" A LOT in my practice. It is seminal to how I think about work and my particular approach to Equity-Embedded Organizational Change™.)

I want to **normalize** much of this *so that it is more accessible* to folks. I will say that:
- Much of what I do is in this document *and* is accessible to many – especially seasoned, Deep Equity practitioners.
- So, *there are aspects of what is in this document that **are not accessible or appropriate** for those without a well-developed, tested Deep Equity (not "diversity & inclusion") practice*. I say this because some things *CAN GO WRONG & CAUSE MORE HARM* if in the hands of those without a *clear & nuanced understanding* of Deep Equity.
  o It's like plumbing or electricity – *some things you can DIY, and other things you need a mentor or other appropriate (& intensive, long-term) training, coaching, & shadowing.*
  o Some of this manual is like that. So, *be aware.*

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[6] Which will be further defined in the section below on *"What is Equity-Embedded Change Management (EECM)™?"*

- Other things are not part of this document at all, because they can <u>only</u> appropriately be taught in an interactive setting.

What's most important here is that this publication can be accessible to anyone who is interested in Equity-Embedded Change Management™. For those who may be feeling daunted by the content, rest assured there is someone(s) in your sphere for whom this material is part and parcel to how they do work and advance change. Feel *welcomed*! Enter wherever you are <u>and</u> join others on the journey. Find them; *partner* with them; learn from/with them; team with them and complement each other's capacities and skills for the benefit of us all…

This publication can be accessed by anyone who is interested in equity-embedded change management. For those who may be feeling daunted by the content, rest assured there is someone(s) in your sphere for whom this material is part and parcel to how they do work and advance change. Feel *welcomed*! Enter wherever you are <u>and</u> join others on the journey. Find them; *partner* with them; learn from/with them; team with them and complement each other's capacities and skills for the benefit of us all…

Format & Recommendations on Use

My hopes and suggestions on use of this document are that it provides reflection on and resources for your own practice – as *individuals*, *institutions*, in *community*, in *networks*, as *philanthropists*, and/or in *field-building* efforts.

I also hope that it helps both equity and change management practitioners to *deepen our understanding* of what equity-embedded change really takes; that we can question some of the things we've been doing, and why, and how effective they are/might be, and what we could or might need to change or upgrade – in partnership with each other as a field of folks who want to continue to contribute to good things in the world.

There are places where it is also suggested to **Slow Down**, take a deep breath(s), and reorient before going on. You will see where these pauses ("**Speed Bumps**") are built in… There is finally a suggestion to assume that, *though some terms may sound familiar, they may or may not be used in familiar ways* in this document. Much of this document

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is designed to provide adequate **nuance** to the dimensions of *change management* approaches, and how there's a difference between "generic" change management and *equity-embedded* change management.

Additionally, this document deliberately does not address everything about change management processes. It focuses on those areas that I have observed seem to be some of the **most pivotal/the greatest power levers, the most confusing, and/or the most intractable**. That's how the sections are designed.

Finally, I have an important **request** of my peers and colleagues in the field. I (like many of you) have had my work used without appropriate attribution or misattributed. This happens often with BIPOC and other non-dominant people, but it also happens with peers with similar identities, sometimes inadvertently. There are places in this document where I ask that readers be cautious with how they are integrating terms or approaches into your work to ensure 1) depth & fidelity to the content, and 2) honoring my labor over the years. It is much appreciated!

Thank you. I'm so happy you're here and coming along for the ride. Welcome and have at it!😊…

Here's an **example** of a **Speed Bump**:

*You may want to **Stop & Journal** here*
(either for a few minutes, a few hours, a few days,
or maybe even a few weeks!...)

Note what's in your body, mind, or emotions right now.
What's going on for you in this section?...
Grab a cup of tea or look out the window.
Do a body scan.

Then, continue when you feel ready
to take on the next portion of the meal...

SPEED BUMP

WHAT IS EQUITY-EMBEDDED CHANGE MANAGEMENT (EECM)™?

What I mean by "Change Management" in this document is particularly "*Equity-Embedded Change Management (EECM)™*. *Equity-Embedded Change Management,* in my meaning, is **an approach to the process of** (in this case) **institutional and field-level change over time that attends to**:

1. The social, cultural, relational, structural, technical, political, energetic, emotional, individual & interpersonal <u>dimensions</u> of change

2. The <u>role</u> of race, gender, (and other aspects of difference), privilege, power, history, cumulative impact, disproportionate burden, and the systemic/field dimensions of change and experience

Equity-Embedded Change Management (EECM)™

3. Strategic <u>catalyzing</u> of dormant levers of change AS WELL AS the <u>removal</u> of blockages to healthy flow in a system

4. Using <u>qualities</u>, dispositions, <u>practices</u> and <u>activities</u> of courage, strategic & healthy engagement with conflict, dauntlessness, and rigorous compassion

The Seminal Aspects/Pillars of EECM™ Processes: The "Special Sauce"

The thing to note about this list is that: *every single part of it is essential.* That is, if one part of this list is missing or gotten wrong, <u>*the whole thing falls apart*</u>. This is why this isn't a comprehensive list of all the aspects of a change process – because <u>*not everything is "important" or "essential,"*</u> but some things are.

At this point, I would encourage readers to be careful not to think that <u>*what may be familiar language*</u> here is necessarily the same thing as what you already know or do. It may be; but it may not be. I say this because I have found with *many* skilled equity practitioners, organizational development consultants, and systems change practitioners – that *once we engage in a change process together,* they often find that what they thought they "knew" is different from what I am actually doing. Another aspect of this is a **piecemeal taking of parts and mistaking them for the whole,** which is an insidious habit of white dominant culture. So, my suggestion would be: **Take it slow & with a "beginner's mind."[7]**

SPEED BUMP

[7] From Zen Buddhism

I recommend you consider _reflecting on each of the essential aspects below_, one-by-one to consider your:

- _Current practice – Individually? As Teams/Departments? Institutionally? As a Field?_
- _What is most helpful & adequate about that practice/those approaches? And what is not?_
- _What next steps might be most appropriate? And what will you do next?_

The **SEMINAL ASPECTS** – which will be **further annotated below & in the rest of this document** – are:

A. How a **Team** is built and structured to _nurture_ and _hold_ the system
B. Cultivating a <u>Critical Mass</u> of **skills**, **stamina**, **courage** and **discipline** across the system/ organization
C. How **Data** is gathered, analyzed and shared
D. Healthy **Communication** systems and practices
E. **Healing** at individual, interpersonal and team levels

A. The "**Team**" that is built to help nurture and _hold_ the system, and how that Team _partners_ with "formal" leadership throughout <u>and</u> after the process – (though members of formal leadership may in fact, be part of the Team) – are crucial. I have found that many organizations have "Teams/ Workgroups/Steering Committees/Taskforces/etc." and many of them have not been: _selected_, _designed, cultivated, led_ or have meaningful _Working Agreements_ – such that they can carry a system through an _equity-embedded_ change process. In addition, the Team may or may not have explicit agreements with formal leadership on the extent and boundaries of shared/mutually beneficial decision-making authority and influence in the next trajectories of the organization. Hence, existing teams might carry the system through _something_, but there are some very specific criteria, attributes, activities & practices that get built _to be able to carry a system through the <u>fire</u> of EECM™_.

That is, <u>not every bowl/**container** can hold hot soup</u>. The **design, formation** and **cultivation** of a Team is the forging of such a bowl/container. And "good intentions" are necessary but not sufficient for _work at certain depths._ Additionally, _work at certain depths (and under certain triage conditions)_ requires a _critical mass of skills and capacities in a system to already be present, and there may be insufficient time to grow them._ This cannot be overstated: There are certain phases and types of equity-embedded processes that require high skill in a certain density or order to be

> **Every single part of this definition of EECM™ is essential…**

successful in _cauterizing_ wounds, _excising putrefaction_, and _setting up the system for future healing & building_. And if such _cauterization, excising_ and other _triage_ activity is not 1) brought to bear in time, and/or 2) done _efficiently_ and in a _specified time frame_ – the fall out & damage to the system is _extreme_ and some may not be _reparable_.

I have found that many systems and organizations are facing such issues; **hence there is a need for enough equity systems change practitioners – both _internal_ to organizations as well as _external_ consultants – with this very specific skill set**, who are _welcomed_ and _effectively partnered_ with, in order for this work to be of greatest benefit. Which is a large part of the focus of this publication.

B. There is also a critical mass of **skills, stamina, courage** and **discipline** that must be built among a _critical mass_ of that **Team** and the **formal leadership**. These skills, stamina, courage and discipline are not necessarily developed in each person, though they often are! This bodes very well for and supports all of the organization's activities and work in the world...

C. How **data** (about the system's current state & potential next steps) is **gathered, analyzed** and **shared** is key and often underestimated in terms of what it takes to do well. This aspect of EECM™ processes is so crucial and so often not well understood (even by seasoned equity practitioners), it warrants significant mention and reflection. This area includes:

- What **depth** and **precision** is asked about system functioning and health in question protocols; and
- How that information is **analyzed** and **packaged** to unearth, name and highlight:
  - the most salient, linchpin **patterns** in the system (at individual, interpersonal, institutional, and systemic/field levels), and
  - how to break, transform, and sustain these patterns into more healthy states, specific to the particular system that is being engaged.
- There are about 97 million other things that could be said here about how to do this well. See the section below on "*Getting on the Same Page.*"
- **Dialogue & Reckoning** is a special subset of these EE approaches to data gathering, analysis and sharing, specifically how *strategically/appropriately sequenced* dialogues are structured & facilitated based on the clear, unapologetic, ratified data.

D. A corollary to Dialogue and Reckoning is the **healthy communication** systems and practices that are developed and/or refined as a result of the change process. These systems and practices require the following to be built/established during and after the most intense parts of an EE change process:

- Effective **Structures** (The operative word here is "effective" as determined by the system as a whole. This includes adequate time, skillful design and facilitation, and other areas.);
- **Bravery** of key system influencers – to speak truth with compassion, while holding the whole as well as those most negatively impacted, and a host of other qualities; and
- **Regularity** so they are not ad hoc/sporadic.

  Certainly, 100 additional things could be said here about "effective" communication systems and practices. I have seen so many organizations underestimate what is needed here and/or misinterpret their current practices and assume they were adequate. It usually takes, minimally, questioning and additional prompting for very well-intentioned practitioners to realize the limitations of their current approaches. It also usually doesn't take much – (aside from strategic and skillful engagement of more parts of the system) – to create more effective communication approaches. I have found this area to be a great area of common unawareness that is EASILY & (usually) SWIFTLY rectifiable (*if sufficient levels of the system are effectively engaged*).

E. **Healing** at *individual, interpersonal* and *team* levels is often needed and can consist of:
- **Deep Equity Individual Coaching** – Which requires particular stamina, bravery & precision on the part of the coach(es). This is to provide a private space for capacity building.
- **Joint Coaching** – Sometimes called mediation, but I don't tend to use that word. This is for pairs, trios and sometimes quads, where things have been a hot mess for awhile and they need some private time to sort out the tangles, rebuild trust, confidence, understanding, and can suss out the degree to which they believe that they are (or can be) synchronized about where they are going, and can work together skillfully and deeply toward that.
- **Team Coaching** can be for functional teams that have hit roadblocks and could use some additional support.

Now that we've completed our high-level outline of EECM™, I offer a brief overview of equity here, as a baseline of shared language to be used in the rest of the document.

OVERVIEW OF
EQUITY IN INSTITUTIONAL FUNCTIONING & CHANGE

When working with organizations and systems, these are all the areas I am thinking about and engaging regarding Deep Equity.[8]

Equity includes but goes beyond a focus on "diversity" and "inclusion." Deep Equity here focuses on multiple levels: **individual, interpersonal, institutional,** and **systemic/societal**. Equity focuses on the <u>historical</u> and <u>current</u> supporting *structures, habits, policies, practices,* and *conditions* that lead to predictable, differentiated opportunities, experiences, life circumstances, and outcomes for specific demographic groups of people. Equity is most concerned with the impacts of power, privilege, and resources for individual and collective thriving, relieving disenfranchisement, and healing the impacts of daily assault and long-term, systemic inequity and trauma.

Individual and interpersonal dimensions of equity include: cross-cultural literacy; deepening capacity to have challenging conversations; recognizing unconscious bias, emotional triggers, power dynamics, and microaggressions; manifestations of inequity from an *intersectional* perspective (i.e., the intersections of race, ethnicity, gender, socioeconomics, age, language/dialect, LGBTQ identity, geography, immigration status, religion, etc.); and deepening capacity in physical and emotional healing and presence to remain open, curious, and engaged in emotionally-charged personal reflection and dialogue.

<u>*Additional areas at these first two (individual & interpersonal) levels include*</u>: Values and (conscious and unconscious) beliefs about the worth, intelligence and capacity of dominant and non-dominant communities; becoming more aware of our thoughts, perceptions, biases, stereotypes, etc. about people and groups; family/group history, dynamics, and patterns; exposure, relationships, and the density of beyond-surface-level experience in cross-cultural contexts; and training, study, learning, and on-going communities of practice where we live, work, play, and learn, in order to deepen our equity understanding and capacity.

Institutional dimensions of equity include attention to *organizational climate, culture, structures,* and *processes* such as: Leadership, goals, planning, and policies; values and beliefs; programming and project foci; access and inclusion; collaboration, relationships, and trust (*and* structures that foster these); internal and external communication systems; personal and collective commitment and accountability; human resources; grantmaking approaches (if applicable); evaluation & success metrics and methodologies; fundraising, donor cultivation, financial management and investment approaches; field-building and partnership; and other areas.

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[8] *Please only use language from this section with appropriate citation* of Sheryl Petty. Some of this language was inspired in partnership with Natalie Bamdad, Change Elemental. Note that those with significant intersectional equity and justice capacity along various dimensions, may have different, complementary ways of describing these concepts and approaches.

Equity also includes attentiveness to how **white dominant[9] habits** may manifest at all of the levels above (*individual*, *interpersonal*, *institutional/organizational*, and *systemic/societal*), regardless of the identities of practitioners. The purpose in this attention is to *notice* and *transform* dominant approaches to ways of being, doing, thinking, analyzing and communicating (among other areas), to **allow a *wider variety of human manifestations* to be perceived and recognized as valuable, intelligent, relevant and wise**. This moves beyond "good intentions" to include *awareness*, *skill*, *courage*, deeper *partnership*, and loving but rigorous *accountability*.

Often, institutions focus on *structural* and *technical* dimensions of **organizational functioning** (i.e., those that are more easily measured quantitatively), and usually attend insufficiently to the *social/ relational*, *cultural*, and *political* dimensions of equity and organizational functioning,[10] because these require both quantitative as well as more nuanced qualitative approaches to assess and build capacity. All five dimensions of organizational functioning – **structural, technical, social/ relational, cultural, and political** – must be addressed to pursue deep equity.

The Journey

Finally, I wanted to share some thoughts about the phases of change management as they relate to equity. For change management consultants, these phases of change processes will be familiar. But what makes *Equity-Embedded Change Management (EECM)*™ different? As I've mentioned, this publication will address this question, though it will not detail *everything* that occurs in each of these typical phases:

TYPICAL PHASES OF EQUITY TRANSFORMATION PROCESSES

PHASE 1:
Exploring / Getting Started

Non-linear & cyclical

PHASE 2:
Assessment, Analysis, Reckoning & Healing

PHASE 3: *Action Planning & Implementation*

PHASE 4:
Implementing Action Plan Priorities & Iterating Cycles
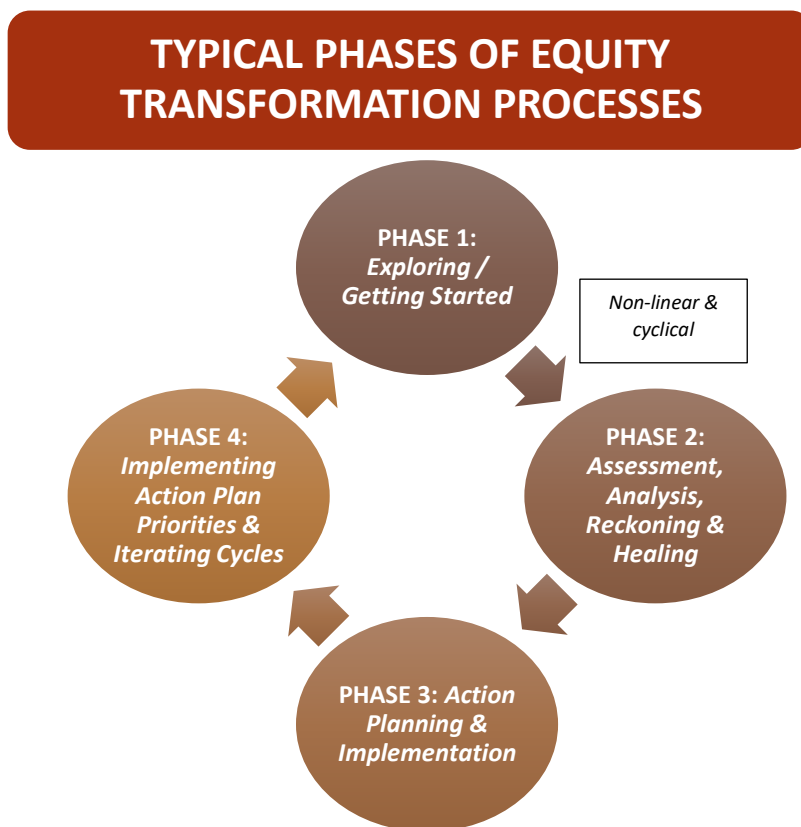
[9] Not be confused with white culture or male culture in general. "*Dominant culture*" or "*dominant identities*" refer to groups who hold widespread positional power in an organization or society. In the U.S., some prevalent dominant identities include white, male, heterosexual, able-bodied, cis-gender, native English-speaking, among others. There is nothing 'wrong' with male or white or heterosexual, or any other dominant identity. The issue is a *value-hierarchy* and stigmatization of those who do not appropriately conform to dominant ways of being, doing, thinking, seeing, understanding, analyzing, communicating, etc.
[10] Again, a nod to Jeannie Oakes' inspiration.

Some of this material is built on a model I developed some years ago called the Equity-Driven Systems Change (ESC) Model, applicable to a wide variety of institutions, including multiple levels of education systems.

What I will say here is that, Phase 1 in an *EECM*[TM] process involves very particular approaches to designing the Team that is partnered with (as noted above), how they are cultivated, and what they focus on. Others have written on this elsewhere[11], so I won't elaborate on that here. What I wanna focus us on in this publication is, **where do change processes typically go wrong** and **what do we have to anticipate so we know we are READY for the strenuousness of the journey**? The rest of this publication will discuss many of the nuances to undertaking each step in the above cycle.

I offer the following visual as another (non-exhaustive) window into the dynamics of EE/EC change processes[TM], more specifically, aspects of the work individuals and institutions will be undertaking if you "double-click" on the Phases above:

COMPONENTS OF EQUITY & SYSTEMS CHANGE PROCESSES:
(Non-Exhaustive) Steps to Collective Action

1. Clarifying *Beliefs & Intentions*

2. Expanding & Deepening *Awareness & Perception*

3. Strengthening *Skill-Building & Aligned Action*

4. Ensuring Adequate *Reflection on Impact*

Developing Alignment about:
- What is True
- What is Possible
- What to Prioritize
- What to Commit
- How to hold Loving Accountability

Common Phases, Emotions, Experiences:
- Fear, Distrust, Misalignment
- Confusion, Uncertainty
- Emerging Clarity & Deeper Trust

Approaches:
- Reckoning & Inner Work
- Facilitated Dialogues
- Ratified Agreements
- Meaningful Metrics

As you may be gathering, each of the components above[12] has a *very* specific meaning in EECM[TM] that is more nuanced than generic change processes. (For instance, the process of "Alignment" is its own phenomenon, described in its own section below and in the glossary.) This document will address areas in both of these diagrams at a high level appropriate to written material.

The sections that follow describe key aspects of EE change processes[TM], particularly for equity consultants and equity organizational change agents, zooming in on some of the areas shared above...

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[11] See for instance Maggie Potapchuk's *Operationalizing Racial Justice*, 2020. She also has a version specifically for philanthropy on her Tools & Publications Page.
[12] A version of this diagram was developed in partnership with Aja Duncan a couple of years ago when we were working together on a racial equity learning cohort. Also, though I had been using the terms "awareness, beliefs, intentions, alignment, action," etc. for some years, I learned during that cohort that Dr. Barbara Love also used a complementary version of some of these terms. This diagram is an amalgam of those two.

DETERMINING READINESS & GETTING INTO CHOICE

I've heard from many equity consultants that **determining readiness** is either 1) **overlooked/seen to be immovable/impenetrable**, especially earlier in one's career, and also prior to the recently broadened field-level awareness of the need for equity change processes. For many consultants, this area may seem relatively _unquestioned_ – i.e., we may not feel (or have) much agency around who we can partner with (there are bills to pay…).

The other aspect of determining readiness is that 2) **consultants often make compromises that they (we) wish we hadn't made**. **This is particularly true in relation to:** _clients with substantial power; in certain stages of one's career;_ and _if one is an equity practitioner working in white (and/or male or other) dominant systems._ I include this section to support increased agency in our own thinking and ability to <u>choose</u> (energetically, emotionally, verbally, financially, etc.) who we want to be in equity consulting relationships with.

I would also offer this section **for organizations or systems seeking equity consultants**. You may find food for thought in what's below and there are also wonderful resources on how to select a consultant depending on your system's current state.[13]

I offer **connection to a framework** I also authored[14] a few years ago, specifically for equity practitioners and consultants about the _"Components of Deep Equity Capacity Building."_ That Framework is seminal to this current document about equity & change management, as it provides a grounding for the following.

DEEP EQUITY CAPACITY BUILDING FRAMEWORK
(brief version; originally authored in partnership with <u>Change Elemental</u>;
see Appendix for *full version*)

A. Organization **TYPE** – Across the _white dominant[15]-to-social justice_ spectrum (aka "101-303")

Note: "101" or "303" does <u>not</u> necessarily mean "easier" or "harder." Both ends of the spectrum (as well as "202" in between!) can be challenging OR more difficult based on a host of factors – including;
- leadership/staff/board **_receptivity_**
- leadership/staff/board **_skill_**/"BENCH"[16] (across multiple domains)
- history of **_unresolved or ignored tensions_**, **_structural issues_**, **_time horizon_**
- and other areas

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[13] See for instance Suarez, Kerrien with Ericka Hines. "_So You Want to Hire an Equity Consultant._" Equity in the Center, 2019. https://www.wokeatwork.org/post/so-you-want-to-hire-an-equity-consultant.
[14] Please see the Appendix for the full publication developed when I was with Change Elemental.
[15] As many know, note that "white dominant" doesn't necessarily mean "white," since any of us may exhibit <u>white dominant</u> (or any other dominant culture) <u>habits</u> in various aspects of and moments in our lives.
[16] Discussed further below.

B. DIFFICULTY – i.e., Easier vs. heavier "**lift**" (aka "how steep" is the uphill/incline angle or "how much of a hot mess is it?")

One note I will add about "lift" (that's not in the Framework) is that in my experience each end of the 101-303 spectrum can be in **denial** and **gaslight** themselves as well as equity practitioners. *HOW* "denial" and "gaslighting" manifest are a bit different at each end of the spectrum.

C. DEPTH & INTENSITY OF INTERVENTION – i.e., What is and isn't possible based on the intervention *desired*, *requested*, and available *resources* (including financial). Such interventions can be:
- "*Toe-dip*" (e.g., workshop or other one-off engagements & offerings)
- "*Pool*" (i.e., multi-day, multi-week, single-system interventions; e.g., with HR or leadership or programs or board, etc.)
- "*Ocean*" (i.e., multi-system/institution-wide, multi-year interventions, partnership & support)

D. PHASE – Start-Up/Year 1 to Multi-Year 2, 3, etc. & hence, what is and isn't appropriate based on the organization's phase of change

E. ROLE – i.e., The role(s) the equity practitioner is playing in a system (which can change over time, by choice and/or necessity), e.g., trainer, organizer, advocate, artist, researcher, capacity builder, healer, system transformation consultant, field builder, analyst, etc.

Reflecting on one's intentions and efforts with a system _over time_ using some or all of the above lenses (among others!) can support *wise decision-making* about <u>what</u> to do, <u>when</u> to do it, <u>how</u> to do it, and (perhaps most importantly) <u>WHY</u> to do it (and hence, what we think is *possible* and what *impact*[17] we are seeking in the system). I have found that the more aware of and thoughtful we are about the following factors, the more choiceful and in our power we can be about the engagement throughout its duration. And the converse also seems to be true: The *less* aware and thoughtful we are about the following, the more emotionally and energetically challenging, time impacted, potentially contentious, unclear, etc. the engagement and equity practitioner + organization relationship can be. **The (non-exhaustive) factors that I most often consciously and intuitively consider are:**

A. *Is this a 101, 202 or 303 system?*
B. *How heavy a lift do I think this will be?*
C. *How much work have they (or haven't they) done before in equity (at what depth)? in change management? in improving basic organizational systems and functioning?*
D. *What is the system's **Bench**[18] capacity in equity? in change management? in the nuts and bolts of institutional functioning?*
E. *How resistant or receptive is leadership?*
   - *What is the leadership's Bench in equity? in the basic aspects of leadership (vs. 'management') functioning?*
F. *How are influencers throughout the system <u>in relationship with each other</u>? (How mutually honoring OR contentious are these relationships?)*

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[17] "Impact" will be spoken about later in this document.
[18] See the Glossary for a definition of how "Bench" is used in my EECM™ processes.

G. *What role(s) am I capable of playing?*
- *In general?*
- *In this system?*
- *With this group of people?*
- *In this phase of my life & career?*
- *What do I have passion for right now?*

H. *What is the system calling for most?*

I. *Are there any gaps in what the system **really** needs and what the consulting team I/we are putting together is capable of providing? If so, how transparent:*
- *Have we been about these gaps with ourselves? with the client?*
- *Should we be about them?*
- *How will the work with the system be impacted by the (equity, systems, change management, technical, etc.) bench capability and gaps of the consulting team?*
- *etc.*

I have found that the <u>less</u> I am reflecting on such questions, the more "unforeseen" 'trouble' the engagement runs into. I put "unforeseen" in quotes because, I have also found that – usually equity consultants and practitioners know (when pressed!) about the writing on the wall. We just may often 1) have to ignore it or put off attending to it (for various reasons, often related to bandwidth), 2) or we are moving too fast to take the time to <u>feel into the implications</u> of this foreshadowing and what it may mean we need to do (in terms of course-correction, different planning, new/amended consulting team and/or client team development, conversations with the client and/or consulting team, etc. (Given the white dominant habit related to "urgency" – real and 'false' – consultants and practitioners are not immune to succumbing to such relationships with 'time' as well…)

Note that my "ocean" level processes assume partnering with an **Equity/Change/Justice Team/ Workgroup/Taskforce/Council** inside of the system (differently named) – <u>which has a very specific set of criteria for 1) forming</u> and *2) <u>functioning</u>* (as noted above). I have often found that organizations may have a pre-existing team that does not meet the criteria for the level of rigorous functioning required for *Equity-Embedded Change Management*^{TM}. Hence, there is often a period of *re-working* an existing team to ensure that it is up to the task of holding and carrying the system through an equity-embedded change process. This includes the development and ratification – (so that they are "live" and not just perfunctory) – of "**Working Agreements**" that will hold *not only* the team but also (potentially/likely) the <u>entire</u> organization <u>not just for the duration of our work together</u>, but potentially <u>in perpetuity</u>, until they no longer need to look at a 'list.'

(One additional thought about organization or system **size** as I end this section: Having dialogues with colleagues advancing equity transformation in local, national and global organizations ranging from three to tens of thousands of employees, there are many aspects of EECM^{TM} processes that remain the same regardless of size; and there are aspects which require nuance and progression through the *layers* of a larger system. I would love to undertake this valuable exploration in partnership with others, of how to maintain Deep Equity *depth & nuance* as one engages in equity system transformation at multiple levels of scale…)

The notion of "**getting on the same page**" (and how this is done) is absolutely core & seminal to EE change processes™. Without this done skillfully, *there can be no or limited forward movement in a system*. As we all know, some systems stay stuck for a long time, with fallout and harm to those still present as well as to those who have left, and to their communities, partners, the field, etc. (depending on the organization's reach and role[s] in the **ecosystem**).

Additionally, sometimes this step of getting on the same page (as discussed in this publication, in this and in the next section on *Alignment*) – is **not done to the depth that the system _really_ needs to heal** thoroughly enough, so _patterns recur or reappear after some time_, or _take root in other people/ parts/places in the system_. Much of this is predictable and hence, preventable.

This is **like the human body** (and is connected to the sections below on System Health & Clearing Blockages). You know, when we only take some of the healing regimen prescribed to us, *and the problem we are trying to clear up recurs in the same place, in different place(s), and sometimes with a vengeance*? Or when a wound is not thoroughly cleaned out, and the body is not able to neutralize and transmute the unhealthy element or toxin(s), and so creates workarounds (that can cause other problems), or the system is further harmed by the unremoved/unmetabolized toxic element(s)? You know what I mean; this happens (a lot of the time).

This publication is geared (in many ways) toward organizations that have long-standing, tremendously harmful conditions that are festering and need to be cleaned and healed for the system to move forward. _For systems that have already healed from such circumstances OR for those that do not have such long-standing harm & damage to heal_ – some of this content may not be relevant to you. That's ok; take what is useful on a smaller scale, if it is helpful…

Data & Categories of Analysis

The original **analysis categories** I use in equity assessments were born out of a publication I co-authored called the Equity-Driven Systems Change (ESC) Model. I developed three extensive sets of rubrics for that publication to assess:
   a. _Strategies_ & Approaches to Embedding Equity in Institutional Change
   b. _Implementation_ & Follow-Through with Those Strategies
   c. _Professional Learning_ Needs Related to the Equity-Based Strategies & Implementation/ Change Management (i.e., the first two areas)

I won't go into much detail here on design parameters of equity assessments, since many people do this now. Certainly such a process assumes and requires a **Design Team/Equity Team/Workgroup/ Committee/etc.** according to very specific criteria and cultivation parameters, based on the system's current state, capacity, strengths and needs (as noted elsewhere in this document).

What I will say (again) is that *what distinguishes EECM™* **assessment** and analysis from other approaches is how **data** is **gathered** and **analyzed** – i.e.:

a. What **depth** and **precision** regarding system functioning and health is asked about in question protocols;
b. And how that information is analyzed and packaged to unearth, name and highlight:
   i. the most salient, linchpin patterns in the system (at individual, interpersonal, institutional, and systemic/field levels), and
   ii. how to **break**, **transform**, and **sustain** those patterns into more healthy states (i.e., move to very intentional and specific forms of action).

These are the most important aspects of EECM™ processes. As noted in the section on "What is EECM™," if any of the above components are missing or distorted, the system may not heal to the degree needed or desired.

Along with re/forming an appropriate team/workgroup/etc., these components are also the **essential first stages** (in my processes) to helping the system get into "alignment" (discussed in the next section) about: *where it is; where it wants to go; how it will get there; what time frame is best; how it will know it's making progress; how it will course correct; and how folks will be confident that alignment is real and can be maintained.*

The **accuracy** of the data & portrait of reality and **ratification** across a ***critical mass of key, equity-credible system influencers*[19]** is essential to this step and phase.

Is everything always perfect and does it always work? No; of course not. Are these the parameters I have found to be most salient and impactful in equity-embedded systems change? Yes.

This section is the beginning of **Reckoning**.[20] I began using this term some years ago[21] in working with systems trying to understand <u>milestones</u> in where we were going. **While Reckoning is not the ultimate destination, *it is a key juncture on the journey and in the process* of equity transformation**. And – to reiterate a point – if the Reckoning is not sufficient (as determined by the system itself), the system may not heal (adequately).

The consultant(s) and/or internal equity practitioner(s) needs to know:
- *How you will **support** the system to get to sufficient Reckoning – including *plan*, *path*, *steps & sequence* (even if that's iterated and riffed on as you go, which it will undoubtedly be…:);
- *How you will **know** if the system is progressing in the right *direction* and at a helpful *pace*; and
- How to **unstick** the system if things get bogged down on the journey.

This is a combination of interventions with: the Team/Committee/Workgroup; coaching (individual and joint, including the CEO/executive leader[s]); skillfully designed and facilitated, sequential sessions (discussed below); and work with the formal leadership body (individuals and team).

Approaches to Assessment

While there are many approaches to assessment, **in EECM™, "Assessment" means *equity-embedded* assessment.** Hence, the <u>purpose</u> and <u>approaches</u> to data *gathering*, *analysis* and *sharing* are deeply grounded in an equity analytic, which is in turn, grounded in **Rigor + Kindness™** *(a term I coined some years ago; see the next section on Alignment as well as the glossary for more information on its genesis and use).*

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[19] Note that "who" ratifies the data, matters.
[20] See glossary for how the term "Reckoning" is used in my EECM™ processes.
[21] See "*Seeing, Reckoning & Acting: A Practice Toward Deep Equity*," S. Petty, 2016.

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My understanding from even equity-minded consulting colleagues, is that the approach taken in my work to equity assessment and analysis may be unique and gets to a particular depth of analytic that is not common.

As noted previously, my understanding of the components of equity analysis were derived from my work in the late 2000s and early 2010s with my career in organizational development, education and systems change. (See especially The New Frontier: An Integrated Framework for Equity & Transformative Improvement in Education, and The Equity-Driven Systems Change (ESC) Model: A Toolkit for Improving Institutional Practice & Student Outcomes, developed in partnership with Singhashri Gazmuri and Ed Porter.[22])

In my experience and practice, **the categories of institutional functioning** (used in my assessment processes) are common and **(in most cases) transcend geography, size, sector, type of organization, and mission.**

> **What distinguishes EECM™ assessment from other approaches is the depth and precision with which data is gathered, analyzed and packaged; how linchpins are identified; and the understanding of levers that can enhance or disrupt patterns…**

Like many consultants, I use a range of qualitative and quantitative approaches to gather information on areas covering *individual*, *interpersonal*, *institutional*, and *systemic/field* dimensions of equity *current state, desired state, history,* and *blockages.* From an EECM™ perspective, equity either shows up in ALL aspects of institutional functioning (from finance to program, to field, to org culture, to systems, structures & processes, relationships, board, etc.) – or it doesn't (or is nascent or at earlier stages of evolution). **I have yet to discover any aspect of institutional functioning that does not have equity dimensions.**

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[22] See *"Seeing, Reckoning & Acting: A Practice Toward Deep Equity,"* S. Petty, 2016.

"*Alignment*"[23] **is a technical term** in my work in Equity-Embedded Change Management (EECM™) processes and has come to mean a consensus building approach that seeks to promote mutual understanding of multiple perspectives, deepen empathy, and strengthen an organization's capacity to engage in rigorous debate and compassionate discussion across a range of experiences, identities, and levels of equity awareness. Alignment in my approach to EECM™ sessions and processes seek to build general agreement about and support for the most important areas of an organization's equity work, appropriate pathways forward, the next steps the organization will take to pursue them, and rigorous but compassionate accountability agreements. Hence, **key components of alignment processes include** coming to consensus on: what is *true* (historical perspective and current state); what is *most important* and *possible*; what the organization will do *next*; deepening mutual *understanding*, *commitments*, and *trust*. Alignment does not imply uniformity, though a high degree of consensus is quite common in relatively short time frames with commitment, diligence, adequate design and facilitation.

Picking up on the previous section, Alignment is a key step in getting on the same page and uses the *skillfully gathered and packaged* data to get the system into a series of specifically sequenced dialogues. The data and "alignment conversations/sessions" – (which can include reflection, dialogue, energetic, breath, somatic, and other practices) – should also serve a *myth-busting* function, helping the system get on the same page about the difference between 'paper' vs. 'real' tigers. The *sequence, design and facilitation* of these dialogues is a cornerstone of EECM™ processes. The process of *Reckoning* is continued and deepened here.

> (**Note**: I have a hesitation in sharing this term "Alignment" in this publication, as I have seen and hence, have a concern that folks will begin to use this – and other terms – to mean different things and inadvertently distort or dilute their meaning. My hope and request are that folks come up with their own terms or strive to ensure that the intention of the cornerstone terms in this document are used with depth & fidelity to the greatest degree possible. This way, we can all retain their intended potency.)

As we all know, in EECM™ processes, **what is "true/real" is contentious** and often based on power and privilege. There is much more that could be said about this in a dialogue between and among equity capacity builders and change agents, in terms of how to maneuver this in 101, 202 and 303 spaces, where "reality" has different meanings across systems…

There are a couple things to note to make *"Equity-Embedded (EE) Alignment sessions"™* **powerful & effective** (though this is not a full list):

- The practice of **Kindness with Rigor™**. I started using this term many years ago when I found clients would often ricochet between kindness and struggle with how to engage with the depth and rigor of equity transformation processes when it is called for. Many organizations – across the social change spectrum, in different geographies, sectors, with different sizes, etc. – would use the term "nice" to describe their culture, meaning it in a not beneficial way.[24] Hence, helping the organization grow *beyond* "nice" or overly/false "polite" culture to

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[23] See the glossary for a definition of how the term "Alignment" is used in EECM™.
[24] Someone mentioned to me Derald Wing Sue's *"politeness protocol"* that picks up on these notions.

Rigor with Kindness[25] became a descriptor I began using as a cornerstone of work with clients.

- o **For white dominant (101) clients as well as 202 systems**, this looks like "surface 'niceness,'" conflict avoidance, fear of intense conversations, and lacking or limited skill in engaging intensity with lovingness.
- o **In 202 and 303 spaces**, this looks both similar to and different from 101 contexts, and can pick up on our internalized oppression. I find that 202/303 folks can shy away from the practice of Kindness with Rigor and exhibit a form of conflict avoidance as well, (for particular reasons). Hence, addressing conflict avoidance and fear of intensity in 202/303 contexts requires a different set of strategies and skills than in 101 contexts.
- o The analogy of "*how do we engage with someone we love and are in committed relationship when we find ourselves at odds,*" usually works to help people find the proper **stance**[26] to not only engage in Alignment sessions, but in the entire EECM™ process, *as well as* for the duration of their tenure in an organization (and possibly for life).

- • The second key component here is making powerful, penetrating, **precise Working Agreements**[27] *and USING them* so that they are real and not just perfunctory words on a page/screen/wall.

- o Many consultants do this. We all have our own lists, styles and approaches to helping clients ground in them authentically.
- o I tailor Working Agreements given the client's particular challenges and growing areas – so that they are PRECISE to their circumstances.

The result of effective EECM™ processes is that the system, and key individuals in it, should be *changed* in a way that is irreversible and can benefit the system (both the organization *and* the ecosystem[s] of which it is a part). This should particularly be true after Alignment sessions and effective **Equity Coaching** (which is not the same as generic coaching or

> **The practice of "Kindness with Rigor"™ is a hallmark of EECM™ processes.**

"leadership coaching." Effective Equity Coaching includes and extends beyond these.) *I have found that how I coach and what's needed in deep EECM™ processes is not the same as coaching in more general organizational development (OD) or generic change processes.* **The need for and practice of Rigor with Kindness™ shows up more profoundly in EECM™ *Alignment* processes and *Coaching*, and hence the capacity, stamina and skill of the equity consultant or internal equity practitioner becomes even more pronounced *to sufficiently exhibit these skills* for the benefit of the system.**

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[25] This term "Rigor with Kindness" was also inspired by specific methodologies in my 25+ year Tibetan Vajrayana Buddhist and African-based Lucumi/Yoruba practice and ordination. See the glossary for a definition of how this term is used in EECM™.
[26] Another key, linchpin concept and term in my EECM processes. See glossary for a definition of how the term "Stance" is used in EECM™.
[27] See the glossary for a definition of how "Working Agreements" are used in EECM™.

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THINGS WE DON'T TELL/TALK ABOUT: CLIENT CHALLENGES & CONSULTING TEAM CHALLENGES

Here's where things get dicey. I alluded to it earlier in this document – namely, that (as consultants, practitioners, and general humans) sometimes we are forthright with ourselves and sometimes we are not looking squarely enough in the mirror at what we are doing <u>and</u> what situations require/call for from us – either because 1) we can't see what's needed/we don't know/it's beyond our skill set or capacity in that/those moments, 2) we are running so fast we don't (or don't think we <u>can</u>) slow down to look, assess/suss out long enough what's happening and what it will require of us, and/or 3) we don't wanna see/notice (either because of what it will mean about us or what we may need to do/change/be/become/etc. We are busy people, with full lives, and multiple commitments and interests; we are human; and these are intensive processes and situations. Any or all of these things could leave us with a lack of awareness and/or capacity to meet the needs of the client or partner situations before us (though we are trying our best)…

This section requires us to *hold ourselves & each other in Kindness and Rigor*. This is difficult sometimes if we don't have this as a practice with ourselves and with each other. There's so much required here to make reflection and discussion of this section go well – without beating ourselves or each other up. I would ask you to hold <u>both</u> yourself and your colleagues in this. It is hard; we're human; we make mistakes; we don't always know how or correct them (or in time/soon enough/deep enough/thorough enough…).

SPEED BUMP

Here are a couple of **vignettes**[28] to illustrate some of these situations, spur your own reflections and inspire your own thoughtfulness:

Client Vignette

A very white dominant client with little to no previous training or experience in "DEI" asks for comprehensive transformation support. The executive leader is earnest and seems committed, but something seems "off," like, when pushed, you can't see them really stepping up to the plate of what will be needed.

In addition, the start of the work is delayed and the organization "assigns" a project lead with little to no *racial* equity experience. You have a bad feeling about this, but go along with it anyway because you like and have good chemistry with the client and think good things can happen together.

The work starts and the client displays all the fragility[29] you anticipated, including the executive leader fighting you, the truth, and the Team/Workgroup/Committee and staff's corroboration of the data. The system also begins treating you – (if you are a Black or Brown person) – like many of the equity change agents in the system. Meanwhile, they didn't get enough DEI training. So, they are a hot mess of: people who *deeply* understand and embody equity in *middle management and administrative positions*; people in *senior leadership positions* who "value diversity" and may value "inclusion," but don't know what either of those are; and/or conflate "diversity" and "inclusion" with "equity" and think they are the same.

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[28] As noted previously, all vignettes in this document are an amalgam of different situations, extrapolated from the author's (and other practitioners') experiences over many decades. They should not be associated with any particular person, organization or situation.
[29] See Robin D'Angelo on <u>white fragility</u>.

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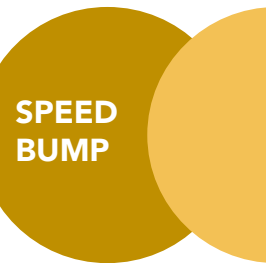
Also, the senior leader(s) and project lead think they are "woke" (regarding equity) and demonstrate insufficient receptivity to learning, though they profess to be committed learners and "realize how far they have to go." You and the client are exhausted though they have made it through the first (bumpy) stages of a transformation process with some useful, but hard-won benefit…

SOME QUESTIONS & FOOD FOR THOUGHT:
Reflecting on both your skills and your passions/interests. That is, the client may need some things BUT we may not either 1) do those things (well or well enough for what the client needs), and/or 2) like to do those things…

- *What went wrong here?*
- *What could you have done differently?*
- *What would you do differently next time?*
- *What recommendations or advice would you give to another consultant or equity practitioner in this (or a similar) situation?*
- *Other reflections?*

Consulting Team Vignette

You are working with trusted, valued consulting colleagues who you may have known for a long time, where you mutually admire each others' skills, styles and approaches. You have worked together on other projects, but this is a "**High Wire Act**"[30] and may be a new type of work for you to do together.

Partway through the project, you discover that what the client needs, you, your consulting team and/ or colleagues are not up to the task. The situation is too fraught, the trauma is too thick, the fragility is too dense, the issues are too long-standing, the structural/process & other challenges and needs are too complex, etc. – and what you all have brought to the party (*as amazing as it may be!*) – is just not gonna cut this thickness.

You and your consulting colleagues do not see eye to eye about how to proceed – either what is most important and/or how to go about supporting the client to transform. You have different (but powerful) theories of change. THIS IS IMPORTANT; IT MATTERS. What's more, **they might both work**!! But you can't do them both: You can *either* take highway 87 or 275 and they will both get you there. One might take longer; you will for sure see different sights/encounter different terrain on each trip; but you can't take both at the same time.

You and your consulting colleagues know this; you might have even talked about it (once you discovered it and realized you were pulling at cross purposes – which may have taken some time…) Your styles of working with the client are significantly different; and (in another situation/at a different moment), those styles might have been *complementary* and benefitted the client and the situation. But we are now in triage, and the client needs something and someone who will act fast to alleviate the pressure and the pain ASAP. *There are moments for the slow healing, and moments which require decisiveness. This is the latter.*

Your theories of change coupled with the heat of the client moment *make it hard to see* both 1) what is happening, and 2) what is/are the right move(s) here, now. You and your consulting colleague(s) may also be in your own pain/trauma/dysfunction/fatigue/anxiety/ill health/family drama/overwork/just need a break/etc. – so that just makes it even harder to figure out **WHAT** to do and **HOW** to do it, in a timely-enough fashion.

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[30] As I call any comprehensive, deep EECM™ process (i.e., "Ocean" processes, from the *Equity Capacity Building Framework*, in the Appendix). See the Glossary for a definition of this term.

This may be especially acute when some of your consulting colleagues have mad, crazy skills in working with 303 clients, and others have mad, crazy skills in working with 101 clients – *but those different types of clients need different types of things, because they have VERY different starting places AND very different skills, capacities, and current states.* So, this even <u>furthers</u> the misdiagnosis and competing theories of change…

Furthermore, you may or may not <u>*recognize*</u> and/or <u>*appreciate*</u> those differing styles and approaches to working across the 101-202-303 spectrum.[31] This impacts your **confidence and trust** in both <u>*yourself*</u> and <u>*each other*</u>, and hence your ability to be in **kind and rigorous dialogue(s)**, **deep enough** and/or **soon enough** to chart the way(s) forward. Sigh…

SOME QUESTIONS & FOOD FOR THOUGHT:
- *Have you ever experienced anything like this?*
- *What happened here?*
- *What would (or did) you do? Or might you do differently?*
- *What advice would/(have) you give(n) to others?*
- *What are your lessons going forward – for the benefit of the client? Your own well-being? The depth and integrity of the consulting team working relationships? Other?*
- *Other thoughts or reflections?...*

SPEED BUMP

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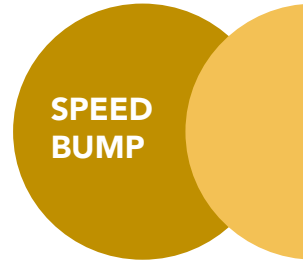
[31] We will discuss this more in the next section on *"Complementary Team/Consulting Styles."*

Picking up on the last section, this one goes deeper into *what's happening when we bring different styles and foci* to EECM™ processes. Note that I am focusing in this section on both consulting teams as well as teams of internal organizational equity practitioners (who may or may not be working with external equity consultants as well).

Our different styles, skills, passions and expertise are gifts. This is true in general, but it's especially beneficial when we can bring this "medicine" to bear in healthy, complementary fashion for the benefit of the client or system.

As mentioned before, sometimes we cannot see and/or misinterpret the differential approaches we are bringing to situations. Sometimes this difference and tug-of-war is healthy and fortifying – teaching us that there are more ways to see/do/be/look at things/feel/know/notice/ diagnose/pursue/analyze/ offer/etc. These things are great! But when we run into trouble – i.e., when we find ourselves at loggerheads and/or fearful/concerned/annoyed/threatened/avoiding/etc.

- *What can we notice about ourselves, each other & the situation?* and
- *What can we draw on to help get us out of the muck as a team of internal and/or external equity practitioners?* These challenges can be formidable when working across the 101-303 spectrum, because of the (conscious and unconscious) **Value-Hierarchy**[32] of particular approaches and skillsets along that **Spectrum**.[33]

That's what this section is about.

(A **suggestion** here as you continue reading this section: *Pace yourself. Take a deep breath or 2 or 3 or 4… Notice your physical, emotional, energetic, and mental responses/reactions/sensations. How are you feeling? What's coming up for you? Why?* Perhaps jot some of these down; *Take Your Time*; and do some Inner Work[34] practices to stay present, open, reflective and grounded…)

SPEED BUMP

This section is also about **releasing our competition mindsets and/or internalized oppression**, when/if they are present. I'm hoping we can find our way through together. Here are some other suggestions and thoughts:

A. Picking up again on previous themes, *How much are we reflecting on or aware of what the client actually needs/its **current state/readiness** and **designing for adequate complementarity** in our skill sets & approaches?* I know this is not new for skilled equity consultants and practitioners, but I have seen some challenges (e.g., when noticing that we have different skill sets & capacities is taken as a statement of differing *worth* or *value*, rather

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[32] See the Glossary for the various ways I use the term "Value-Hierarchy" in EECM™ processes.

[33] Different than the "101-202-303 spectrum/continuum." See the Glossary for the various ways I use "Spectrum" in EECM™ processes.

[34] See for instance: Petty, Sheryl, Kristen Zimmerman and Mark Leach. Toward Love, Healing, Resilience & Alignment: The Inner Work of Social Transformation & Justice. Nonprofit Quarterly, 2017. https://nonprofitquarterly.org/toward-love-healing-resilience-alignment-inner-work-social-transformation-justice/

than simply different skills & capacities[35]). This makes me think there are some things that may at times be missing here…

 B. How much are we designing for complementarity based on –
  a. *Client current state and*
  b. *Desired path(s)*
  c. *And finding the consulting supports they **need** vs. designing **based on what we** have (which may not sufficiently heal the system)?*
 C. Commitments and **design** considerations:
  a. Building in the time to **synch** (including emotions; differing & potentially complementary visions and theories of change; decompressing; etc.)
 D. How much might our **internalized oppression** be influencing how we are perceiving, experiencing and valuing each other? How would we notice & check for this (individually & collectively), periodically throughout the work?

From what I can tell, the equity consulting field has gotten *a lot* better about these needed, ongoing/ periodic reflection and synchronization areas, and **clients seem to see the need and benefit** and, hence, are now willing to pay for this needed/essential time in EECM™ processes. I'm **not sure how many funders are aware** of and forthcoming in building this into budgets (vs. seeing it as superfluous or not being aware of it at all). I have seen a number of funders demonstrate this awareness, but this may warrant additional reflection from the funding field…

<u>Additional Considerations:</u>
 A. Is it the **right consulting or internal/external team partnership**?
  • *Complementary styles*
  • *Complementary skills, roles & interests[36] – e.g.,*
   o *101-202-303;*
   o *Toe Dip-Pool-Ocean spectrum;*
   o *Healers, HR, narrative, artists, somatic, physical movement/body, energetic, leadership, board, finance, etc.*
 B. Is it a good/**healthy partnership**?
  • *Can you REALLY talk to each about what's going on in the work at multiple levels (personal, interpersonal, institutional [inc. culture, structure, systems, processes, etc.], systemic/field)?*
  • *Is there high enough trust on the consulting or internal/external team? Can you build it (when/is there time)?*
 C. What do you do when you get in and realize the system needs something that <u>none</u> of the consulting *or internal/external* team have (sufficiently <u>and</u> can't build fast enough to not leave the system in further turmoil) – even with all your joint "superpowers"[37]?
  • *Has the time really been built in?*
  • *What's happening when you can but you don't really talk to each other (either <u>ever</u> or <u>soon enough</u> or <u>deep enough</u>) about what's going on in & needed in the work?*
 D. How much overwork, overwhelm and/or moving too fast is happening?
  • *How is that impacting your teaming in EECM™ processes?*
 E. To what degree are you/the team **succumbing to the white (and/or male or other) dominant habits and limitations of the client**?
  • *Some of this may have to happen (perhaps only[?] with 101 clients, <u>to</u> an extent to keep the work moving forward. As one client of mine said (paraphrased), We have to meet folks where they are to support them moving to other depths of capacity…)*
  • *Is the consulting and/or internal team synched on how much of this is <u>par for the course</u> with certain clients – so you can monitor & manage it for the long-game?*
  • *How much is too much/excessive and <u>distorting</u> the work?*
 F. Any **other thoughts** coming up?

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[35] Which doesn't mean we can't grow. It just means that, in the moment, when the client or system may need some things, we or some of us may not have them; and it's important for the team of equity practitioners to notice this, so we can collectively plan accordingly for the greatest benefit…
[36] See the Equity Capacity Building Framework in the Appendix for more info on these categories.
[37] As I've heard Elissa Perry call them.

A Few Final Thoughts on Synchronizing & Embedding

Systems are made up of both the necessary ***components*** ("**what**") of the systems and "**how**" to move those components and support them to do different things (in themselves and in relations to each other – i.e., ***systems change processes***) – in our case, in support of liberation, kindness with honor, system health to serve the collective good, and planetary sustainability.

Part of equity consultants and internal teams **synchronizing** is about **ensuring that we're trying to design the same thing** – i.e., are we trying to design a *building* or are we trying to design a *car* (not a *tree* or a *duck*…)? I'm convinced that we aren't always talking about the same things (e.g., "designing a building") and *we don't know we aren't.*

Sometimes we aren't in agreement about what all the necessary components of systems are. When we haven't had or made the time to have sufficiently deep conversations about these things, we *may not even know we're not in agreement.* If we think we are in agreement, I have found in consulting and other team partnerships, it is not uncommon – (similar to client systems) – for there to be a lot of *misinterpretation* about what those components are actually comprised of and misunderstanding of what they are – i.e., ***using the same words to mean different things*** among the consulting team and the client system. (That is, thinking that a "tree" is a "computer" or a "whale" or something else that's more familiar.)

As we've discussed, uncovering where a system is out of alignment is one of the main first components of EECM™ processes to solve, *because not much can be done until folks are sufficiently synched on current state, potential paths, commitments, & re/building trust.* My point is that such *misalignment* can happen with consulting teams and/or internal equity teams or leadership teams, as well.

The equity field seems to be doing a fantastic job of getting at this level of granularity so that folks – especially those *new* to equity or to deep equity – **are not confused about what *key* terms, concepts, methodologies, etc. *mean* and *need to be/do* for them to legitimately warrant the title "equity-embedded."**

The other thing I've seen among equity consulting teams and other practitioners is – even if we do agree on all the components, we may be at odds about **how** to systematically help *move/influence the system* toward our EECM™ goals.

So, we have to (learn to) **be okay in the discomfort** of this (making mistakes, not knowing, etc.) – and how long this discomfort lasts (which may, at times, be a long time 😊), and muddle our way through as best we can with mutual support, grace, kindness, fortitude and presence…

Finally, I've heard questions about "*how do we continue 'our core work' while doing all this equity?*" My experience is that an organization or system's "core work" is not separate from equity. That is, there are **components of this document that should be embedded in what an organization or system is doing day-in and day-out** (e.g., how regular meetings are designed and facilitated; how strategic plans/strategy directions are reflected upon; how performance reflection approaches & metrics at *individual*, *team/department*, *institutional*, and *field* levels are reflected on; etc.) and there are components that are, in fact, separate processes that will need specific time and design allocated. Each system should discern which is which, given their particular circumstances, current state, and desired undertaking…

Pause & Transition

At this point, you may be tired ☺️. The above was a lot! We thought about making this document into 2-3 volumes and releasing it over time, to give folks time to digest. We ultimately opted for this all-in-one, knowing that we would insert this and other "Speed Bump" sections and suggest that folks *really take a break, slow down & digest* for a bit, go back to previous sections, etc. before reading on.

We really do recommend that you not go further until you feel sufficiently digested with what has come before, to this point. This will give you time to integrate the material into your metabolism – your psycho/socio/emotional /cognitive/ energetic/physiological/spiritual system; the totality of you.

SPEED BUMP

Then…*when you feel digested, go on & read more*. We're going to go layers deeper in the next sections, so let us be prepared for the richness of the meal(s) and the courses to come…

PART 2

SYSTEM HEALTH & COMMUNICATION

If you do <u>nothing</u> but this, this will (mostly) cure/help heal the system…
And if you do <u>everything</u> but this, the rest will only get you so far…
Healthy system communication is <u>essential</u>, but not sufficient…

Intelligent, healthy systems **communicate** with themselves *appropriately and effectively* on an ongoing basis. Like (e.g.) your pancreas and liver communicate with each other (and other parts of the system), **what is needed to support the overall health and well-being of the system**. They don't communicate about everything, (probably not?) all the time – but they communicate about what they need to, at the appropriate times & ways to support overall *health*. **This is what we are going for in EECM™ processes**.

The body as a system can teach us about *organizational* health. Many know this. When our body is functioning well – the liver, the lungs, the pancreas, other organs, etc. – all know how to *preserve/support their autonomy and effectively collaborate* for the health of the whole. From a Deep Equity perspective, we can take this even further to feel into/discern the aspects of system health that are often not noticed or attended to in dominant culture approaches (i.e., those related to power, privilege, race, gender and other dimensions of difference, disproportionate burden, cumulative impact, etc. and how these impact teaming, approaches to leadership & decision-making, strategy, metrics, and so on).

Why do I say healthy internal communication (as determined by those most negatively impacted) will essentially cure/help heal the system? Because healthy communication will get you:

- *Lubrication* – the wheels are greased for *flowing* dialogue, such that
- The *brilliance* in the system will be *unleashed* and *visible/recognizable/perceivable*, and hence
- That brilliance and *wisdom* can (and when the system is in healthy dialogue) *will* be used to benefit the system (and ecosystem) more broadly, in both the short- and long-term.

I'm telling you, *you can't lose here* by focusing on it…

Part of what I see in systems and one of the main to-dos in equity transformation processes, is supporting the system (leaders and other key influencers/actors) to develop & use *appropriate/ effective*, regular two-way/multidirectional communication.

This picks the above comments about EECM™ processes: Namely that **healthy communication** systems and practices – (that require **structures, bravery** & **regularity**) – get established in a system *during and after* the most intense parts of an EE change process.

Appropriate information flow (in appropriate, multidirectional, layered, electronic and verbal dialogue formats, etc.) is fluid and helps provide *ongoing* **nourishment and lubrication for systems.** This is what we are after: *fluid, ongoing nourishment* for the system's good work in the world.

One of the main system dysfunctions I see is systems have often lost their ability or have *severely* diminished **ability** and **habits/practices** of **effective communication**, *clearly*, with *appropriate transparency*, in *multidirectional* ways. This is often because (typically) "leaders" – [I am talking usually, but not always :), about *formal, 101 leaders*]:

1) are **hiding** the ball/**afraid** of sharing information (sometimes consciously or unconsciously);
2) are **confused** about what's important to communicate & be in dialogue about, often because the organization's growth has outpaced their (typical) "traditional" (i.e., white and often male dominant) skill sets;
3) **don't see/are oblivious** to what's important to communicate & be in dialogue about, & may be *deliberately avoiding* seeing; and/or
4) **don't have, never had, have never seen, or have limited experience with**
   - appropriate, *strong, cross-institutional/multi-level relationships* and
   - *multifaceted, high-trusting dialogue formats* (e.g., in regular *skillfully designed & facilitated, ongoing* team meetings, staff meetings, ad hoc gatherings & meetings, board meetings, etc.) 🙂
   - Therefore, don't know what it would look like to have such effective, equity-embedded, internal communication systems on an ongoing basis.

So, **a system needs to identify and understand its barriers to such *healthy, ongoing, effective, multidirectional communication* – either why it hasn't happened in the past/so far, and/or *why it is not happening now/what is preventing this***. Note that "healthy," "effective" and "adequate" communication in *EECM*^{TM} processes is determined by those most negatively impacted in the organization. *If they say it's not working, it isn't.*

Equity-minded folks who are most negatively impacted in the system usually also know what effective, creative, healthy internal communication should look like AND how to create it. This is important to note.

Typical **answers to/reasons Why Many Internal Communication Systems Are Ineffective** (from an equity perspective) include the following, which will be further elaborated on below:

A. Fear and/or M**istrust** (multiple levels; multiple reasons)	B. Lack of / limited **Skill** in effective *internal* communication and/or in equity in institutional functioning	C. White (and sometimes male) **Dominant Understandings of How Communication Works** / should work, and what is and isn't "*appropriate*" communication

D. Inattention / Insufficient Attention to *internal* communication (not just *external*)	E. "**Adequacy**" challenges: 1) There are **not enough people** in the system who *sufficiently* understand equity **in institutional functioning** (not just "equity" in *general*); and/or 2) The **system** is not in *adequate, regular, high-trusting dialogue* with the **highly-skilled equity folks** in the system.

Technical Elaborations on the Above (for the curious...😊)

Regarding "C"/Dominant Understandings of how communication works, what I've often seen here is a need to *be cautious of both* <u>over-sharing</u> *as well as* <u>under-sharing</u>, on the part of those in both formal leadership positions as well as those in other parts of the system.

Regarding "**D"/Inattention/insufficient attention** to *internal* communication, often the focus is *very much* on *outward*/field communication, and internal organizational communication is <u>ignored</u> until a whole host of problems have developed and festered because they have long-been ignored or under-acknowledged and given insufficient attention.

A corollary to this is, then the system often seeks extreme solutions to mitigate and address long-standing (and what *then* seem like *intractable*) issues – that, if they had been paid attention to & adequately addressed sooner, would not be so difficult to solve.

> **Systems often have severely diminished capacity, habits & practices of effective communication with clear, appropriate transparency in multidirectional ways.**

This is **just** like physiological/bodily systems – i.e., if we 1) notice, and 2) appropriately/sufficiently address the issues *at the earliest stages*, then they are more solvable than if we <u>wait</u>. "Noticing" is both a **skill** issue and a **will** issue. That is, sometimes we *don't know/aren't aware of what we don't know*, and sometimes we don't *want* to…

Regarding "**E"/Adequacy** challenges refers to adequacy in addressing communication issues and *what we think is "sufficient."* Understanding "sufficiency" is also an "equity skill."

I've seen such "Adequacy" challenges or understandings of sufficiency occur in (at least) <u>two ways</u>:

1) **There may not be enough people in the system who** *sufficiently* **understand equity in institutional functioning** (not just equity in *general*).
- Systems do benefit from "equity generalists" (i.e., people who are deep social justice folks), but systems need deep social justice folks who know how to transform institutions (soup-to-nuts) to embed equity.
- If either of these are missing – equity generalists OR equity-in-institutional-functioning specialists – *the equity skill brought to bear may not be sufficient*.
- I see this a lot & folks confused about "why it's not working/we didn't see/such-and-such isn't '*enough*,'" etc.
  - It's like bringing people who have *some* plumbing training to **fix** an issue, and expecting that <u>they will have the same effect</u> as people who have decades of plumbing experience.
  - And sometimes you need an *electrician*, not a *plumber* (i.e., a different set of very important skills)…
- This is an issue of misperceiving or misdiagnosing adequacy in equity solution-building and implementation (which *any* of us might do/have done; and we will pick up on a bit in the next section).
- This is naïve but I see it all the time among both white dominant as well as deep social justice folks.
  - With white dominant folks, I think it's mostly unawareness of the nature of equity in institutional functioning.

o   With social justice/Deep Equity folks *who are generalists or specialists in some aspects of institutional functioning* (but may not be familiar with **EE change management™**) I think it may be something about internalized oppression, doubting our value, and hence **conflating** *noticing different skills* with *creating a Value-Hierarchy[38]* about those "different" (i.e., benign) skills.

The <u>second way</u> I've seen Adequacy challenges occur is **2) if the system is not in *adequate, regular, high-trusting dialogue with the highly-skilled equity folks in the system*, it will not be possible to adequately benefit from their expertise**.

- This also happens all the time and is a shame.
- Many systems issues are happening precisely because of this – i.e., The system:
    - Doesn't notice the wisdom & talent present (& worst, often represses or maligns it), and/or
    - It notices such talent in only a surface way and then pigeon-holes or otherwise *curtails the ability of that wisdom to adequately permeate & nurture/nourish the system ongoingly, to everyone's detriment.*
- Then, people often throw up their hands and say, "*I don't know why this is happening… Things are so wrong, people are so unhappy… I don't know what we need to do about it…*"
- **This second challenge is likely the root of most social and environmental issues the world over: inadequate awareness, acknowledgment of and engagement with the wisdom already present in systems that knows what to do to promote health, harmony, sustainability, well-being & joy.**
- I know many of you know *exactly* what I'm talking about…

So, we've been talking about <u>unleashing</u> (where it has been curtailed), and <u>awakening</u> (where it has been dormant) the **comprehensive intelligence** and **dynamic wisdom** in a system that has been **contorted/repressed** or **numbed**. These are essential/inescapable/key linchpins to system health, from an EECM™ perspective… (Please attend to them [adequately]! 😊…)

> **Many systems issues arise because the system doesn't recognize a wide enough range of wisdom & talent, represses or maligns it, or otherwise curtails the ability of wisdom to adequately nurture/nourish the system ongoingly…**

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[38] See the glossary for a description of how the term "Value-Hierarchy" is used in EECM™ processes.

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This section does not focus on the *full* cycle of inquiry to implementation. It is **focused on key** (though not exhaustive) **elements** that I have found come up over and over again, across organization types involved in equity transformation processes. These key elements look both similar as well as different across organization sectors, geographies, sizes, etc. The similarities are so strong across these areas that it warranted its own section. These (non-exhaustive) elements are:

A. *"Bench": Equity & Other Capacities*
B. *"Leadership" & Who Should "Lead"?: Key Influencers, Critical Mass, Complementary Deployment & Dance*
C. *"Will, Skill," Courage & Love*
D. *Time, Timing, Realistic & "Urgent"*

Equity Bench & Other Capacities

We don't always talk about the **Bench**[39] it will take to actually embody equity in an institution's practice. I hear a lot about "*diversity*" & *representation* (which are important); I also hear a lot about *growing* folks (skills and capacities; which is also important). But I don't often (or ever?) hear about the **minimum threshold equity bench capacity that any particular organization will need in order to embody its equity goals**. Again, this can be both similar and different across organizations.

This is often/usually a taboo area to talk about because (some think) it implies that we are not all "valuable" if we name that we are not all equally "skilled." Sometimes an organization needs *essential, critical, minimum threshold equity skills* in order to deliver on its promises and commitments regarding equity. (This is true of any deep skill set – finance, HR, program, admin, ops, etc.) This does not mean "one" magical person who's going to do it for an organization (neither the CEO nor an equity "lead" person). For white dominant organizations *who have limited equity capacity* when embarking on such a journey, this becomes a *hard turning point – a hard turn in the steering wheel,* that forces them to say, "Are we gonna put our money (and other resources/commitments) where our mouth is?"

I have had more than one organization say to me, "*Well, we're not planning on hiring soon and no one is likely to go anywhere, so I'm not sure what we're gonna do about our equity bench…*" I said, "*Well then you have to pare down what you have promised to do, because you don't have the capacity to deliver on those promises, and you can't grow this capacity in the time frame the organization needs it, (given the learning curves of the people present)…*" This is usually a hard wake up and reality call for the organization, because it implies that who they have is not good enough.

This issue of "good" (for white dominant organizations) and "good *enough*" for orgs with significant BIPOC staff – is a deep one, in my experience. Because it implies that folks are not "good" people or their amazing skills are not sufficient. We have to ask, "good enough/sufficient *for what*? to do *what*?" This is the question. We have to de-load the emotional intensity and weight of equity capacity – and see it for the domain of expertise and knowledge that it is. Yes, people can and do grow equity capacity; but sometimes that growth is not in the timeframe and/or in the ways that an organization

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[39] See the Glossary for a definition of how I use the term "*Bench*" in EECM™ processes.

needs. This is not a value judgment about the "worth" of individuals; it is a statement about a domain of skills that will support higher/deeper, more beneficial institutional *functioning* (again, just like finance, or HR, or Ops, or Program areas, or plumbing, or carpentry, etc.). We recognize that certain institutional functional areas require *prerequisite, minimum threshold skills* for the organization to do well, for the benefit of its mission. The same is true for *equity* as a domain, (so long as we don't get rigid, just like – from an equity mindset – we would hope we wouldn't do regarding any of the domains of institutional skill and expertise). "Expertise" is not a dirty word, from my perspective in equity, *so long as we don't get rigid about it*; so long as we stay receptive, flexible and in a learner stance – **recognizing expertise vs. earlier stage-growing in certain areas is *healthy & necessary* for institutional functioning.**

These are often <u>very</u> taboo domains to speak about in some of our communities and organizations. My perspective is: It depends on what you're trying to do and in what time frame, what skill is needed to do those things. Distributed, multi-faceted, non-rigidly hierarchical leadership is *essential* in any equity endeavor. How that needs to look and what is appropriate, depends on the particulars of the endeavor. Sometimes you need people who know a lot about plumbing if you have a gnarly plumbing job; sometimes it's ok if folks are earlier in their plumbing learning journey, because things are not that thick. Sometimes anything in between….

"Leadership" & Who Should "Lead"?:
Key Influencers, Critical Mass, Complementary Deployment & Dance

Building off of the last section, this notion of "what is leadership" or *what does "leadership" become* in an equity transformation process, is crucial… Some people know **what** to do; and others know **how** to do/implement. Sometimes these *are* and sometimes they are not the same people. Those who know *what* and those who know *how* should *both* be in key/primary leadership roles, because if the "what" is wrong, *the how won't matter and can lead to dangerous places by implementing the wrong thing "very well."* People with each of these capacities need to be listening to each other for effective, deep, beneficial work.

In equity processes or in organizations seeking to more deeply embed and embody equity, "leadership" becomes *problematized* (i.e., mainstream notions are questioned)**,** *broadened & expanded*, so that more and varied types of expertise are *recognizable*, *honored* and *skillfully engaged* on an *ongoing basis as formal parts of leadership.* **This is the most important thing that could be said in this section**. What we think we understand about "skill" becomes *expansive* to promote the overall health of the system. As we all know (as institutional change agents reading this), "leadership" is the/a main driver of all the sections of this document. If we get that wrong, nothing else will go (well).

It is a shaper, flavor, texture, tone, color, type, weight, heft, tenor, caliber, echelon, lens/mirror/door through which/with which *all other aspects of this documents get filtered and eventually enacted.* So, if we get leadership wrong (or conceive of it too narrowly or in limited ways), *everything else will be negatively impacted or impaired.*

<u>White dominant</u> and otherwise inequitable systems think of leadership in very narrow ways. Those types of institutional models, histories, practitioners & ways of thinking (and the moments we are in them) recognize (typically) very limited (sometimes called "traditional") forms of leadership and label them "leadership." So, when ways of looking, acting, thinking, communicating, etc. are not familiar or are seen as inflammatory, volatile, hostile, flamboyant, or otherwise unorthodox – then, an inequitable system will seek to quash, silence or otherwise limit the expression of those broader, more expansive, "unconventional" (from some perspectives) forms of leadership.

Effective, equitable leadership in systems change and change management processes will: 1) *recognize* such varied, broad forms of leadership, and 2) *unleash and skillfully engage* them for the benefit of the system, in 3) *non-exploitative* ways, and 4) support the system to build **Critical Mass**[40] of such varied leaders/forms of equity-embedded leadership. These are the hallmarks of this section for Equity-Based Change Management™.

This has to do with: 1) formal leadership; 2) informal leaders and influencers; and 3) how Equity Teams/Workgroups/Taskforces/Steering Committees/etc. get *designed/conceived, formed, cultivated & facilitated both during & beyond* a formal equity change process, including how those teams are in skillful & ongoing *deep* relationship with formal leadership bodies & structures.

The point is to **recognize** (and *grow/find*) *brilliance in multiple manifestations* and *deploy accordingly* in a dance-like[41] manner (which is *responsive* to the "music" – i.e., the conditions in the system and ecosystem/field at any given time…😊).

> **"Leadership" becomes problematized, broadened & expanded so that more and varied types of "expertise" are recognizable, honored and skillfully engaged on an ongoing basis as formal (and informal) parts of leadership to promote the overall health of the system.**

Will, Skill[42], Courage & Love

These are core to equity transformation in my experience (and the experience of many others no doubt). One of the readers of this publication, reflecting on our coaching conversations, shared this on the title of this section: "***Will, Skill, Courage, and Love are reinforcing; can sometimes be sequential; are always necessary; and sometimes you need more of one to overcome a moment when another is faltering or less present***."

With that in mind, here are additional thoughts 😊:

1) **Will** –
   o *Do we even really want to change and see things different in our institutions?*
   o *How deep does that go?*
   o *Are we serious or not, or just giving lip service?*
   o *What are we willing and not willing to change? To what degree(s)? By when/in what time frame?*
   o *Do we even know?...*

2) **Skill** –
   o *Ok, if we are <u>really</u> serious, (hearkening back to the "Bench" section), what is our individual and collective capacity to actually live into those aspirations?*
   o *Can we grow the capacity? How much? In what time frame?*
   o *Do we need more, deeper and/or different kinds of talent in the system?*

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[40] See the glossary for how the term "Critical Mass" is used in EECM™ processes.
[41] Some readers may be familiar with Donella Meadows and her piece *"Dancing with Systems."* I had never heard of her until recently, when I had been using this term for some years. The use of the term "dance" in EECM™ processes comes from reflecting on my experience as a dancer, my Lucumi/Yoruba priesthood and practice (which includes specific dances that transform the subtle body system as a core part of spiritual practice), and my yoga asana practice.
[42] I first heard (and was compelled by) the phrase "will & skill" some years ago when I was working for a national capacity building foundation where we worked in multi-year change processes with mid-size *entire* school systems around the U.S. on systems transformation. Though, in my experience with many colleagues then, the notions of "skill" did not often include the fullness and depth of equity that we are seeking in this publication.

- How much <u>unleashed</u> vs. <u>caged/inhibited</u> talent is already in the system? How much of that have we recognized? (Or worse: how much have we actually damaged, bruised, abused, ignored, bullied, teased & feared, etc.?)
- How much of this talent & brilliance are we <u>ready</u> and <u>able</u> to (as in, know how to) cultivate, nurture, (heal), embed skillfully in our performance management systems, and support?
- Are we and how much are we <u>willing</u> (back to #1) to let that talent be unleashed and brought to bear, for the benefit of the system, the ecosystem and our collective liberation?

3) **Courage** –
- So, ok say we're 1) Willing and 2) actively assessing our Bench capacity (i.e., Skill) for the endeavor, are we/how much are we <u>really ready</u> for what's about to go down if we take on this journey (for real)?
- How have we prepared ourselves <u>individually</u> and <u>collectively</u> for this journey? (This includes therapy, coaching, spiritual advice, meditation & grounding, physical practice, advice from other organizations & leaders – broadly defined 😌 – about what they have seen/heard/learned/grown/done/etc. in the course of their own journeys, so that we can [begin to] map part of our own…. etc.)
- Yes, we should be a bit nervous here – but not daunted. That's courage (or part of it 😌). The prospect of jumping out of a plane or hang-gliding, or any other intense/extreme experience *should give us pause* and make the heart patter a bit more. That may just be normal & healthy (for most of us); it says we're <u>paying attention</u> to what we're about to do. If we aren't a little nervous (unless we're fully enlightened/realized), *I wonder to what degree we are really showing up to the task before us?…*

4) **Love** –
- The above list would be incomplete without this. We are talking about core aspects of implementation – i.e., what makes this "go/work/happen." Love is core to life itself.
- At depth, equity processes cannot be accomplished (in my experience) without a profound sense & degree of **love**.
- I mean this in the literal sense – i.e., love for the work; love for the people you work with; love for the mission; love for the organization; love for the planet; love for the humans you are interacting with to make changes… etc.
- ***The stronger, broader & more pervasive that love is, the more powerful your equity change process.*** Let me say that again: the degree to which our love is limited, <u>that</u> is the degree to which our depth of change will also be limited.
- Those who have long-term love relationships – (whether with children, friends, parents, or significant others) – know about the ups and downs of love and what it takes of us to hang in there & make it work, through thick & thin. This is THAT in EE organizational change (or at least it will be, when you get to the depths of it…😊) And it will take <u>all</u> of you to make it go/work/transform/heal/liberate… and you <u>can do it</u>! (I know you can, because I've seen it and organizations come through some tumultuous times…!...)
- Love will also be the balm and medicine that heals (alongside the appropriate systems and mechanistic changes that will also be necessary to policies, procedures, structures, rules, agreements, boundaries, people, etc.)….

Time, Timing, Realistic & "Urgent"

There are different understandings of how long things take, and what can be expected in what time frames. That's one of the key questions: ***What*** **kinds of changes are we expecting? And hence, *what* time frame(s) are** <u>**reasonable**</u> **to expect that/those (which) things? And to what degree/ depth?**

The/another key question is: *What was the starting place of the entity or organization from which you are expecting the/a change?* That is, depending on the starting place(s) of those entities, *then certain changes may or may not be reasonable to expect* – either ever or in certain time frames.

These are key questions when asking about "**progress"** and **"change**" in general and in EECM™ in particular. We'll talk more about this in a section below, but I wanted to allude to it here, since it comes up as organizations are thinking about implementation and how to assess change.

The other thing that comes up here – especially for white dominant and other dominant culture orgs, but for any org exhibiting white dominant habits – is "urgency." We all know this. A colleague[43] some years ago used to ask when we were working with a client, are we inquiring enough about the differences between "*false*" and *actual* urgency. I think this is a very important question. It's not that *nothing* is important or urgent. It's that, ***are we interrogating which things*** **are important** (from a deep equity perspective)**, *for what/why, for who, when,* and *for how long*?**

This connects to both 1) having <u>*adequate* **communication** *systems*</u> throughout the organization (which is spoken about elsewhere in this publication), such that *the most informed & wise* parts of the system (from an equity perspective), are in ongoing dialogue with one another to appropriately inform adequate assessment of current state and what's needed going forward. As has been noted, in my experience, lack of adequate & appropriate communication across multiple parts of the system is typically a MAIN issue for orgs at the early stages of an equity journey. Typically, 1) key people in the system are not in regular OR deep, authentic communication with each other, so 2) formal leadership – (which may or may not include *any* or *sufficient* equity-minded people) – is not informed or knowledgeable about what is *actually* happening in the system from multiple perspectives. This leads to a whole host of *predictable* issues related to trust, fables, mis-assessment/mis-diagnosis, inappropriate & inadequate strategies, inadequate/shallow/piecemeal/distorted implementation, etc. – all of which are infinitely **curable**! 🙂

The other part of this notion of "urgency" connects to 2) meditative practice/interior work, (also spoken about below) both individual *and* collective. That is, *the degree to which we are grounded & centered* can profoundly inform how much we are in touch with *right/appropriate timing & what is happening now*. While meditation, presence & centeredness are not the only means for informing our understanding of current state, <u>*they are critical ones*</u>. We all can fall down on these from time to time. The degree to which we get back on & self-assess and collectively assess current state and most helpful pathways forward *will really help us…*

SPEED BUMP

[43] Mark Leach

BLOCKAGES & STUCKNESS: PREVENTING, NOTICING, CLEARING & CURING

There are **various forms of blockages and stuck patterns** that can exist in a system. These can take place in *individual* bodies, in *institutional* "bodies" (teams, groups, organizations), and in *field/ movement-level* bodies. These blockages take particular, familiar forms as various stages in an organization's equity transformation journey. Some of these (non-exhaustive) may look like:

- **Long-term lack of trust** – often between
  - line staff & formal leadership, both directions;
  - staff of different identities and/or roles (race, gender identity, ability, religion, etc.; admin, ops, program, management, executive, front-line, etc.; long tenure, newer hires; etc.);
  - not infrequently staff and boards, again both directions;
  - depending on org type: staff and/or boards vis-à-vis community as well:
  - and other dimensions…
- **Tension, pain, dysfunction, misalignment, fear, frustration, fatigue and skepticism** about what change is and is not possible, and in what timeframe(s)
- **Leadership common/typical vs. excessive myopia** – Meaning, how much limited perspective is *inherent* to leadership roles and "altitude" in the organization (*depending on how "leadership" is structured*), because we can only see what we can see from any seat or position we occupy (period); and how much is denial, resistance, confusion, and/or myopia to *actually* seeing/perceiving what is happening in a system (until and unless) the system screams loudly enough in pain (and sometimes not even then)?...
- **Insufficient humility & receptivity** (*often on the part of formal leadership, but could come from anywhere/anyone…*)
- **Loggerheads &/or missing each other** (*meaning: being at odds, thinking the other is wrong/ mistaken/etc. and/or having difficulty understanding and synching up, alluded to earlier*)
- **Having trouble getting to bigger notions of "we"**[44] (in relation to/in synch with/in support of "I" + bigger org, community/field, planet visions)
- And other possible areas…

PREVENTATIVE

A lot of the above sections are informed or impacted by this notion of "blockages"/backlogs – stuck patterns and gunk in a system. We all know this – whether from our own health and/or what we've seen in rivers and/or the pipes in our homes, or other arenas. Gunk can clog a system – *so we have to clean it out regularly* and better yet, *function in a way & have regular eating, sleeping & maintenance routines such that gunk never (or almost never) occurs in the first place.* If possible, this is the ideal: **That we (& our organizations) are well-oiled/lubricated, high functioning, smooth, well-calibrated, dynamic, receptive, reflective, flowing/communicative systems that supply and provide nourishment throughout the system and in partnership/relationship with the ecosystem, in the most *easeful*, mutually beneficial ways possible**. This is what we are going for.

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[44] I heard this "getting to a bigger 'we'" while working with Taj James and Movement Strategy Center some years ago on client work.

So, our tasks then are to figure out/learn:

1*) What oil/lubricant and hydration (communication/dialogue systems, space/time, meditative/ reflective/grounding, etc.) are best/possible for our system/org (selves/bodies)?*
2*) How do we adequately supply & support these things on a regular basis?*
3*) What is gunk/knots in our system? How does it/do they manifest? How do we recognize it (soon enough/in a timely fashion)?*
4*) How do we ensure gunk/clogging doesn't (or help it not to) accumulate? How do we unravel the knots in the system?[45] and*
5*) How do we de-gunk/de-clog it when it does happen?*

Some reflections on these questions *could* be given in a publication like this, but I think it would/ could be more fun, enjoyable (& educational) for a system to *learn about this through going through exercises on your own* using the questions above.

Do you notice that I'm talking about both *lubrication* and *clearing or avoiding gunk* in the first place? both are necessary – i.e., we need to ensure *flow* **and** we need to know how to *avoid* and/or *clear* clogs when they happen. Both/all are critical. **One is preventative; the other is curative**. *Have at it!*...

CURATIVE

As we know, sometimes there is *long-time accumulation* of gunk in a system – in our bodies, in our organizations, and in our movements/cross-organizational/community efforts. **Clearing long-time clogs (as we also may know) is a more intensive & involved process, requiring sometimes specialized tools, skills & resources for support.**

Some of us engage (or are! 😊) natural medicine providers, such as Chinese, Tibetan and/or Ayurvedic medical practitioners, Naturopaths, or other skilled providers. Some natural healing systems and providers are more comprehensive or multi-faceted/multi-modal; some have specialties; some are specially trained and tailored to be able to address acute issues and conditions, and some are not. *We need to make sure that the resources brought to bear are up to the task* of whatever is before us.

Many organizations these days are facing *acute,* systemic trauma from long-time festering wounds from systems that have not been hydrated, lubricated and/or cleaned on a regular basis (from an equity perspective). All of these have impaired communication systems and structures (described elsewhere in this document) as part of their root. That is, when there is stagnation or blockages in internal communication systems, festering and lack of hydration & lubrication is inevitable (either as a cause and/or effect). In these cases, often Deep Equity consultants and internal practitioners also sometimes have to partner with the system to clean what has become rancid/ infected as a result of stagnation and re-wounding.

As we all know, *prevention is best*! But when we've let something grow putrid for a while, then we need to make sure that the resources we bring to bear are capable of addressing the situation. This is part of the *screening* that one can do with/for equity capacity building consultants, as well as with internal staff (and board members, community members, as the case may be) to see what expertise and resources folks can bring to bear when a system has been long-suffering. It can happen that the *combination* of our resources can be enough to both 1) **clear the blockages/stuckness/stagnation** in a system, and to 2) **heal at the root** *by preventing them from happening in the first place or again*, through adequate structural changes/upgrades/adaptations *that allow the* **chi/prana/lung/aché**[46] *to flow properly.* **A lot of our curative principles and remedies are designed to *do just this:***

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[45] As I've heard one of my Buddhist root teachers say about "knots," though not in relation to organizational systems ☺.
[46] One way of describing the motile and life force principle / element in Chinese, Ayurvedic, Tibetan and Yoruba healing systems, respectively. ("Lung" is pronounced "loong.")

***Re-institute (the principle of) healthy flow* in a system.** We are seeking this in highly challenged institutional systems as well, that are on an equity journey – in part to heal from past dysfunction, and in part to *vision, grow & become* something more liberated than they have ever been before. *We are seeking <u>both</u>: Healing as well as the birthing of new, liberated states for the benefit of all…*

> **Gunk can clog a system, so we have to clean it out regularly and better yet, function in a way & have regular…maintenance routines such that gunk never (or almost never) occurs in the first place…**

THE MEANING OF "PROGRESS"/ (EQUIVALENT TO) HEALING: TO WHAT END(S)?

Returning to this area (which was alluded to before), **what we mean by progress in equity transformation processes**, has a lot to do with:

- Starting place: including (non-exhaustively) *Where along the white dominant-to-social justice spectrum (101-303) was the organization's beginning place?*
- What were original Goals:
  - *Where did the organization/entity/effort think it was trying to go?*
  - *Who was involved in deciding this?*
  - *How was it communicated (with who? when?)?*
  - *To what degree was 'everybody' (defined how?) on the same page about the goal(s) and their* relative importance, possibility/realistic-ness & potential impact?
  - *etc.*

For someone who is just beginning to swim/learn piano/drum/etc., their "progress" will look very different from someone who has been doing any of those things for a _long_ time. The same is true for organizations in an equity effort. That is, for organizations with tremendous grounding in equity and social justice principles, with considerable bench strength in staff and board with these capacities, their progress and growth along a continuum will be very different from one that is much earlier in the journey.

We have to be careful of mis-placing evaluation measures across different organization types (e.g., along the white dominant-to-social justice/101-303 spectrum). As has been stated before, "303" does not mean "better"; it means further in social justice capacity or mission/intention and focus (which comes with a different set of challenges).

My barometer these days is more about *healing*, some of which has been described above – i.e., the degree to which an organism is able to promote *healthy flow* in a system. If it is not able (or I am not able to be of support) to do that, **then the ability of that system** *to do its most beneficial work in the world – including its mission in the ecosystem as well as promoting the healthy, high-functioning, well-being, joy and love of those internal to that system – will also be impaired.* This is my measure of "progress" – so long as the other work of defining/refining & enacting vision, mission, values, strategies, etc. *is simultaneously happening.* The proper flow of chi/prana/lung/aché will prompt us (of its own accord) to do and give our best work to/with/for the world and our fellow colleagues. It is only blockages or stuckness that prompts us to do harm and/or withhold assistance/help, and our loving-kindness where and when it is needed…. Though others may not always experience it this way. The barometer/test for us is: *Are we coming from a place of loving-kindness & devotion to the health of the system, those in it, and its wonderful work in the world?...*

This is a lot. It means *in our evaluations or notions of progress,* we should be looking at and assessing the healthy promotion of *flow/prana/chi/lung/aché* in a system to determine health & well-being, vitality and greatest, positive benefit and contribution to our collective well-being and healing. This is a key point here….

COMMON PATTERNS, STORIES & CONUNDRUMS

This section is more story-sharing. While we've been sprinkling vignettes throughout this document, this section is some storytelling from my own experience about some things many of us have seen time and time again, across many organizations.

If you recognize yourself in some of these, rest-assured, they are an amalgam of different types of organizations and systems over many years. There is no "one" story *or* one type *or* "one" organization here, on purpose. I wanted to give you a sense of what I've seen in the field and what you may also see in your own work as equity capacity builders (and aspirants) both *internal* to organizations and as consultants. Note that the inclusion of these here does *not* mean I (or other equity capacity builders) were perfect in our efforts in relation to these systems and challenges. We also learned our lessons along the way and are sharing some of them here with you. Food for thought 😌…

Here is a list of some of the **types** I was thinking about when these conundrums, common stories, stuck patterns & ways out/forward, were first written:
   A. *Stage "0" – Pre-Training/Needing Baseline Training*
   B. *Approaches Appropriate For White Dominant "vs." Social Justice (SJ)-Oriented Orgs*
   C. *Leadership: Receptivity, Intellectual/Performative, Personal Work & Readiness*

Stage "0":[47] Pre-Training

This means an organization comes and they have had *little-to-no equity training,* have limited/no calibration across the system about what they *collectively* mean by "equity," and yet they want to get to "solutions" and "strategies" *right now.* Sometimes/often the executive leader does not think they need any training and/or is unwilling to invest in it (for themselves or the org), because, "It will take too long," "I've been doing 'this' for XX years," "We need to just get to 'the work'," "We don't have the resources 'for that'," etc.

So, you go forward with the *little to no training*. Recipe for *disaster*! Don't do it!! 😌…

LESSON: Train, train and more training until you <u>and</u> the most equity-minded people in the system *(with whom you should be in regular, ongoing, deep, meaningful contact, as co-partners and co-leaders in the evolution of the organization's equity change journey)* feel the organization/system is *ready* to move to Stage/Phase 1 (which includes Equity Assessment, initial Coaching, and other activities).

Using Approaches More Appropriate for Social Justice Orgs with White Dominant Orgs (*and vice versa!*)

Organization comes and they are *fairly/very/pretty* white dominant. While there may be equity bench in the system, it is hidden/hiding, abused, over- or under-engaged, exploited, targeted, tired, over-worked, invisible, scared, are one of 2, 3, 5 people or some other tiny percentage of BIPOC/equity-minded/non-dominant people in the system, and/or are over-it!...

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[47] I heard this phrase from working with a client, who described their system as "not even at stage 1."

Some of these equity-minded folks may be <u>on</u> the Equity Team/Workgroup/Taskforce/Steering Committee, and may or may not be bringing their best wisdom and gifts to the Team (either because of the above list – tired, targeted, over-it, etc. – and/or they are on, "*Wait and see how this will go; y'all not gon' get my goodies before you've earned it! and I can trust that you gon' use it right and not distort my sh*t!...*).

Well, so you come in (or are already there) and start trying to get people to *talk about really hard things, right off the bat; you know "truth telling" & Reckoning*… Well, *the system is f**king <u>not ready</u> for that*; and it is a HOT MESS, because *the wisdom is most definitely <u>not</u> (sufficiently!) in the room.* Or, if the wisdom IS in the system – see above list (scared, gaslit, tired, not giving my goodies to y'all, etc.). Or there are *too few* equity-minded folks in the system to counter and inform the <u>steep learning curve</u> of the white (and other) dominant culture *majority* elements in the system. So, the work is too hard, the counter-narratives about current state, diagnosis, path, etc. cannot (yet) engage in real, authentic, *healthy* dialogue.

<u>LESSON(S)</u>: Do the groundwork first; don't skip it or short-change it. *Know where you are & have appropriate expectations* (i.e., if you're at the ocean, it is not reasonable to expect behavior & possibilities like being in a forest, or vice versa) That is, if you're in a mostly white dominant OR social justice-minded org, *engage them from their gifts/wisdom/existing capacities & skills*, and *build/augment/grow/supplement* from there. Don't expect what is not currently present and/or hasn't been built. Know the difference between "aspirational"[48] thinking and "actual" current state and capacity. Be vigilant about this, so we are not confused or disappointed and/or don't confuse and/or disappoint others.

Leadership: Receptivity, Personal Work, Intellectual, Performative Woke-ness & Readiness

This one goes with knowing the difference between cerebral/intellectual 'understanding' and actual, felt/lived *"embodiment."*

Executive leader says one (or more) of: "*I really wanna do this. I know it's the right thing to do… It's a lifetime journey… I know we have a lot to learn… We're all growing…*" You have been coaching (deep!), providing training (extensive/sufficient), and getting things ready for the Reckoning sessions. When it comes down to it, *the leader deflects, obfuscates, scapegoats, cringes, cries, fights you (and anybody else they can get to, who "looks like a 'target'"), goes into a serious defense crouch, etc.).* You and the staff, board, and Equity Team/Workgroup are shocked, tired & dismayed. The leader is "doing their best" with what they have to work with and their current capacity. (Somewhere in you, you know this, and so do many/much of the others.) But in the moment, you (and many of them) are *livid, overwhelmed and are contemplating giving up & leaving the leader and the org to their own devices…*

<u>LESSON(S)</u>: Persevere; stay the course. You will get through it. It's not so bad, when you look at it (from a distance! especially of <u>time</u>!😊) Let them *unravel themselves; let the knots loosen themselves.* Give things and the system enough *space* to do that. You can't fix everything all the time; it's just not possible. Give it up! Forget it! Let it go! You have done enough/all that you can do (for now). Let the system right itself. (You might bring in other coaches, other consultants, elongate the timeline, try other interventions, trainings, techniques, somatics, etc. – and some of these *might or MIGHT NOT work*.)

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[48] Love this phrase heard from a client I was working with.

Give them time & *give yourself <u>time</u> to figure out the next move here…* You might not know in the moment… But then again, *maybe the next BREATH will tell you what to do and how to do it*; how to move/maneuver/inspire/catalyze, so that the tangles and knots in the system can be seen for what they are: <u>*temporary*</u>; they won't last. So, breathe and let it go, and wait for this <u>*moment to change*</u> so you can see what to do *next…*

Sometimes the executive (or other senior) leader leaves of their own accord (in a healthy, compassionate, mutually appreciative way), when they can see that what the system needs now is not what they have the ability (or can grow into the ability) to provide (in a beneficial time frame); so the best move – for the overall well-being of everyone and the org's mission and role in the ecosystem/field – is to depart to their next adventure/ endeavor, where they can be of greater service. This is (one of) the best moves, if the leader(s) is one of the primary causes for the system staying stuck, and they can see it. Sometimes the leader comes to their own reckoning. This is also the best move, IF it is possible <u>and</u> can happen in a timeframe that does not continue to jeopardize or damage people or the mission/its good work in the world…

SPEED BUMP
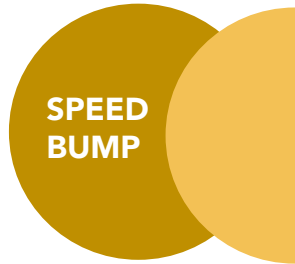
INTERIOR WORK: CONNECTEDNESS, GROUNDING/CENTERING & STAMINA

This segues nicely to *internal work/interior work* – or our own caring and tending to our wellness & well-being, presence, awareness, & readiness to bring our greatest gifts and be our best selves in any given moment, (which can change and morph over time). I and others have written about this elsewhere.[49] Everything in this document requires this; the deeper we go with our inner work capacity, *the greater our equity capacity* in service of organizations and the world. They are <u>correlated</u>, in my experience.

The main things here are: A) *groundedness/centeredness*; B) *connectedness* (to ourselves, to all others, and to the natural world); and C) *stamina.* These seem to be *core principles* needed to do and sustain Deep Equity work. The deeper we go into any sufficient inner work practice, *the deeper our groundedness/centeredness, connectedness & stamina.*

So, not to repeat any of what has been written elsewhere here, but to note a couple of things (that you likely already know), and offer food for thought and reflection:

1. ***To what extent*** are we taking care of/attending to our own well-being, presence, resilience, healing, wellness?

2. ***How <u>adequate</u>*** are our efforts in this? I mean, beyond the "5-minute mindfulness app," what are we doing that will be ***adequate/up to the task*** of the challenges we are facing & what is before us now?
   - *You know how they say, when you are sick is <u>not</u> the time to start preventative medicine. That's when we need remedies!*
   - *This is just like that: Once the sh*t hits the fan, that is probably not the ideal time to START that meditation app /yoga/pilates/massage/hike/ 5 minutes in the morning "that I've been meaning to do/up/increase/create/find/get/know…"*
   - *YET/BUT, when the sh*t hits the fan, it IS when we need the DEPTH of the fruit of those practices and activities, that we <u>train</u> so that we (and all others) benefit from them EVERY day <u>and</u> so that when the going gets rough, <u>we are buoyed</u>. This is (part of) the point.*

3. ***Do we know*** when we need such support/help and are off-balance? To what degree <u>are we even aware of this</u>?
   - *Part of this is <u>time</u> – i.e., Do we even take the time to <u>notice</u> and <u>attend</u> to our internal state, in any given moment? (And how often? For how long? Intermittent/sporadic? Or regular?)*
   - *What do we then DO when we notice that we need help or are off-balance? Do we catch this soon enough, or when we are WAY out of alignment with our best selves?...*
   - *How "regular" is our "regular," and how "regular" does it need to be (given what is before us & what we are called to do)?*
   - *What are we willing to commit? And <u>when</u>?*

[49] See for example: Petty, Sheryl. "Waking Up to All of Ourselves: Inner Work, Social Justice, & Systems Change." *Initiative for Contemplation, Equity, and Action* Journal. Vol. 1, No. 1, p.1-14, 2017; and Petty, Sheryl, Kristen Zimmerman and Mark Leach, "Toward Love, Healing, Resilience & Alignment: The Inner Work of Social Transformation & Justice," Nonprofit Quarterly, 2017; and "Love with Power: Practicing Transformation for Social Justice, by Kristen Zimmerman, Julie Quiroz, et. al., Movement Strategy Center, 2016.

- o *In the end, no one can save us – though we <u>can</u> get help. We have to <u>want</u> it. (You know what happens to a drowning person who fights the person they asked to come to save them?... Yup; that.)*

4. Finally, **<u>what do we do with our own trauma</u>** in the work? As consultants? As internal org equity change agents? When we are triggered, abused, co-opted, gaslit, retaliated against, etc. – *what do we do with all this, <u>so it doesn't turn into poison in our own internal, metabolic/ energetic/psycho/social/physiological/relational system</u>* nor in the organization's?
   - o Here's the crux or the rub: We have to be so vigilant (if we are to do our best work, give of our best gifts, live our best life, and experience and share the fruit and wonder of this incredible world). It can all be at our fingertips…
   - o Sometimes I have heard people say, "That's not possible with MY life, my family, all these kids/people living in my house, under these circumstances, with my conditions, etc." It has not been my experience that *conditions* limit the depth to which we can *practice.* I don't believe and I haven't seen that, with practitioners of multiple lineage traditions the world over – with many children, old, young, with various abilities, extremely poor, very wealthy – all of the above. I have seen and engaged with such folks in *liberated/liberating* practice, for the benefit of all.
   - o We can't believe our stories, the ones we tell ourselves about what *is* and *is not* "possible" with our "given conditions & circumstances." It's not real. *They may be conditions, but we don't have to be trapped by them.* (Repeat that.)
   - o Let's help each other. There is unprecedented access (that we have never seen before) to wisdom traditions and systems, the world-over. *Decide what we want to do & do it. Go deep* (as you can); Vision it; call it into being; get help; support others; "be the change"; *believe;*… and when all else fails, *release* our gripping, so that we *can actually let the innate Intelligence & wisdom of the Universe take over* & reveal what is needed and possible; the Path…

Finally, I would offer here that (for our purposes) there are multiple levels of this inner/spiritual work: 1) *individual* level, 2) *interpersonal/collective/group* level, 3) *organizational/institutional* level, and 4) *field/ecosystem/movement* level, and likely others. Others have written more extensively about these levels.[50]

ALL of the levels are necessary and helpful for work at depth. Do what you can/your best…

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[50] See for example: "Systems Change & Deep Equity: Pathways Toward Sustainable Impact, Beyond "Eureka!," Unawareness & Unwitting Harm," S. Petty and M. Leach, Change Elemental, 2020; and Petty, Sheryl. "Waking Up to All of Ourselves: Inner Work, Social Justice, & Systems Change," Initiative for Contemplation, Equity, and Action Journal. Vol. 1, No. 1, p.1-14, 2017; and Petty, Sheryl, Kristen Zimmerman and Mark Leach, "Toward Love, Healing, Resilience & Alignment: The Inner Work of Social Transformation & Justice," Nonprofit Quarterly, 2017; and Movement Strategy Center's plethora of resources.

DOING OUR BEST/WHAT WE CAN

So, all of this is a lot (or it may seem like that sometimes…). We can only do our best, or what we can, at any given moment. This may change from time to time, as we have more or less capacity on any given day, or any given year, based on what we are going through/experiencing, or have built through our inner work practices, training, and development over time. One point is to not be hard on ourselves.

Sometimes we may think we need to *be* or *do* more than we have/are/can at any moment. And sometimes we can *pull it out* and accomplish or share more than we ever thought or imagined;…and sometimes we can't. Whatever moment you're having, *let your best (in that moment) be enough*…

Sometimes we pressure ourselves to be *so* much for everybody (and for ourselves); because we care; because we want the best for others; because we are committed; because people are suffering and hurting… Do your best; that's all there is. We don't have any more than that. You (and what you have) is enough.

NOW WHAT?
OUTSTANDING/HORIZON THOUGHTS

These are some final thoughts that I am carrying in this moment, as we think about what might be next or our (or my) next horizons in equity capacity building. These are musings and are not set in stone; don't hold me to these! I'm just thinking aloud here as we look ahead to what's possible and needed to advance the field and our collective capacity to advance Deep Equity and the "liberation of everyone and everything, everywhere."[51]

    A. *202 & 303 for others*
    B. *Networks*
    C. *"Meaningful Metrics" & Cycles of Reflection*

A. I think a lot about the difference between **what's needed or required (and possible) in 101 orgs vs. 202 or 303 organizational** contexts. What kinds of strategies, approaches, qualities, or efforts might support which type(s) of organizations? And which might not be (as) helpful, and why? Which are *transferable across* types, and which are not (and why)?

How aware are we of our capacity and *desire* to support different types of orgs? How does or has that changed over time (in our lives and careers)? What might I or we want to do going forward? What does the *field* need or want of the equity capacity building field at this moment? What are the horizons here that we will have to build into and ensure we are sufficiently synchronized?[52]

B. What about **networks** and what *they* need? How much of what's in this document is applicable to them, and how much isn't or would have to be adapted? I have worked with and helped develop a number of networks, alliances, etc. in my career, but I don't work with them often enough to have devoted as much time to these questions or the areas that were covered in this document, to know the answers to these questions.

The other aspect, is – depending on the size, the range of 101-303 type orgs in the network, and geography (e.g., U.S. vs. international; which countries & regions; etc.) – the approaches needed, I think, may need to be *significantly* different (and some might be the same). The developmental arc of networks may also be different than single organizations, in terms of equity capacity.[53] (I'm very clear about the **developmental equity arc** for *organizations* but don't spend enough time supporting *network equity capacity building* to feel confident about the developmental arc for them.) **Size, stage of equity development (*network-wide*), variation/range in equity capacity *across* the network, sector/issue area *readiness* for deepened equity journey *field-wide*, etc**. – will all be more acutely felt, I think, at the network/ecosystem level, than organizationally, which can be somewhat insulated because of having a more closed system than networks, which (themselves) actually *reflect & embody* the broader ecosystem…

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[51] Note that I heard this phrase "for the liberation of everyone and everything, everywhere" from my Buddhist teacher Ngak'chang Rinpoche.
[52] See for instance the architecture and goals of the *Deep Equity Practitioner Network (DEPn)*, which I helped design and launch.
[53] Perhaps others have written on this? I was not aware at the time of this writing…

C. Meaningful **metrics** or **how do we know** how things are going or how we're doing? How much are we skillfully building in **cycles of reflection** to feel into how we're doing and how much "progress" we're making in our efforts? (There are some comments on this in the "*Meaning of Progress*" section above.)

Many have done so much to put on the map the thinking of the Deep Equity field about what "evaluation" is and should be, from an equity perspective. Connecting to the above sections and comments on "progress" and how we tell where an org is on their equity transformation journey; there are models out there that help with this – from:

- The Equitable Evaluation Initiative and their Equitable Evaluation Framework™;
- Crossroads Antiracism's *Continuum*; and
- AORTA's *(Anti-Oppression Resource & Training Alliance's)* riff on it; to
- The Equity-Driven Systems Change (ESC) rubrics[54] I developed some years ago for institutions including and transcending colleges; to
- United Philanthropy Forum and *Community Centered Evaluation and Research's* tool to assess progress among philanthropy serving[55] organizations; to
- Equity in the Center's Awake to Woke to Work framework with its Pulse Check*ᵀᴹ*; to
- Maggie Potapchuk's *"Operationalizing Racial Justice"* tool (with a version for nonprofits and one for philanthropy);
- to name a few…

– there has been some good thinking…

Maybe what we (as a field) have, is enough? Maybe not… **Do these tools apply to networks?** Should/could they?... I'm wondering if the tools would look different if we were writing them _for_ white dominant or for social justice orgs – i.e., *would we be able to see more nuance* of *what's needed AND possible* for such orgs (at each stage on a continuum), by seeing a framework built just for specific org types? Were the existing frameworks and continua written *mostly* with white (or other) dominant culture orgs in mind, so we can't fully see the nuance of what happens (and is possible) when this is no longer the barometer (since so much of many of our work and much of the focus of this publication, is spent trying to move and support the equity evolution of such systems, given their profound impact on the planet)? Does this even matter? (Pardon me if such resources already exist. They didn't come across my radar fully in the writing of this…)

Again (just musing here) – I wonder how many of these existing tools take into account organizational **starting place** across the white dominant to social justice continuum, _with all of its nuances_ (not just at a high level)? I mean, it's *intricate* with systems of different sizes – since different parts of the system *may have different starting places*, and hence *can move at different paces*. Maybe we should look at whole systems _and_ **sub**systems, in cases where things are so large, we need a more nuanced capacity to see "progress" in the different _parts_ of our efforts and the institutions & systems we work in and with…[56]

Is anything else needed here, or are we good/doing ok?... I look forward to you all's thoughts….

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[54] Pages 29-75

[55] Or "PTOs"/Philanthropic *Transforming* Organizations!, as Alice Hom, Equity & Social Justice Director at Northern California Grantmakers mentioned recently at United Philanthropy Forum's conference.

[56] I will note that certainly there are entities who work with very large national and global systems. There are questions we could ask about the adequacy of such approaches and practitioners vis-à-vis Deep Equity. Hence, an opportunity for potentially deep partnering and learning about EECM™ at scale.

CLOSING THOUGHTS...

So we've come to the end of (this phase of) our journey together in this document. I hope what's been included here is useful to you and your colleagues/friends/community members/families, as internal organizational Deep Equity capacity builders, community-driven Deep Equity capacity builders, and consultant Deep Equity capacity builders. We are all learning. There are considerable efforts afoot now to help build out and deepen the bench of the equity capacity build field to better meet the demands of all types of organizations globally, to meet this moment of significantly increased awareness of social, environmental and racial inequity.

So many organizations have gotten and *are* getting _really_ serious about their equity capacity building efforts – and _this matters_ and is critical for our collective well-being, here on planet earth. As you all know, for me (and others), "**Deep Equity" is a hallmark of both _depth_ and _quality_ of any aspect of institutional functioning or capacity building effort** – no matter what you call them (e.g., "HR," "leadership," "board," "strategy," "mission, vision, values," "performance management," "financial planning," etc.). All of these *either have equity embedded deeply, or are at some other* stage in the journey toward higher/deeper "quality" and equity-embedded "high functioning" for the benefit of people and planetary well-being. There are *no "generic" aspects* of institutional functioning (so long as humans are involved).

May our efforts benefit all, far and wide, to the greatest degree possible, beyond our wildest hopes, dreams and expectations. May We and all Beings be Free☺...

GLOSSARY

A compendium of how these terms are used in Equity-Embedded Change Management (EECM™):

Adequacy / Sufficiency

"Adequacy" is always in relation to "adequacy *for what*?" In EECM™, this refers to a number of (non-exhaustive) ways: 1) sufficient understanding of equity in *institutional functioning* & implementation (not just equity in *general*); and 2) adequacy/sufficiency in "equity skill" in internal communications and high-trusting, rigorous dialogue, especially with highly-skilled equity folks in the system.

Alignment

In EECM™ processes, "Alignment" refers to a consensus building approach that seeks to promote mutual understanding of multiple perspectives, deepen empathy, and strengthen an organization's or network's capacity to engage in rigorous debate and compassionate discussion across a range of experiences, identities, and levels of equity awareness. "Alignment" sessions seek to build general agreement about and support for the most important areas of a system's work, appropriate pathways forward, and the next steps the organization will take to pursue them. "Alignment" does not imply uniformity, though a high degree of consensus is quite common in relatively short time frames with commitment, diligence, adequate design and facilitation.

Bench

The capacities (including equity and other areas) that it will take to actually *embody* equity (and other key skills and capacities) in an institution or system's practice. "Bench" can be by *individual* and/or in the *aggregate,* across individuals or teams/departments. I often talk about "Equity Bench," though these (of course) are not the only capacities needed to effectively implement equity-embedded change. These are often taboo areas to talk about for a variety of reasons for many types of institutions.

Catalyzing

EECM™ should serve a "*catalyzing*" as well as *integrating* function for a system, to *unlock* some of the most intractable areas in embodying Deep Equity.

Equity Coaching

"Equity Coaching" *includes and extends beyond* generic coaching, leadership coaching, general organizational development coaching, or generic strategy & change process coaching. Effective Equity Coaching requires specialized capacities, stamina and skills of equity practitioners to benefit individuals, teams and systems.

Complementarity in EE Change Management™ Teams

This refers to ensuring that we are *noticing* and *designing* for the range of capacities and styles of engagement that a system may need in equity practitioners, knowing that we may be differentially skilled, and all valuable. It is highlighted in this glossary given that it may be, at times, an area of tension and/or misunderstanding among equity practitioners.

Container

Not every "bowl"/"container" can hold hot soup. "Container" refers to cultivating the appropriate scaffolding *conditions*, *structures* and *supports* that EECM™ processes may need – (from Equity Teams/Workgroups/Committees + Working Agreements + Skillfully engaged and partnering, key system influencers & equity change agents, and other areas) – to best hold and support a system through a potentially intensive equity transformation journey.

Chi/Prana/Lung/Aché

"Chi/Prana/Lung/Aché" are ways of describing the motile and life force principle / element in Chinese, Ayurvedic, Tibetan and Yoruba healing systems, respectively. ("Lung" is pronounced "loong.") They/it promote/s healthy *FLOW* and vitality in a system, and can be strategically activated or enhanced to clear blockages or stuck patterns in individuals, interpersonal relationships, organizations and/or other systems.

Critical Mass

The essential, minimum threshold of *aligned, synchronized & strategically located* individuals who can help *move* and *hold* a system through deep transformation and healing. The total number varies per system, while the requisite capacities need among this minimum threshold are both similar and different across system sizes and types.

Ecosystem

Interconnected *field* of individuals, organizations, communities, networks and movements who impact one another, and each of whom can benefit from and be impacted by the EECM™ work that any one entity undertakes. The *whole* may experience a cascade healing effect from any healing work done by its parts, as a result of experiencing the blueprint/modeling of that healing in any single system. This is because the parts are all interconnected…

Equity-Embedded Change Management (EECM)™

An approach to the process of institutional, systemic and field-level change over time, that attends to:
1) *The social, cultural, relational, structural, technical, political, energetic, emotional, individual & interpersonal <u>dimensions</u> of change*;
2) *The <u>role</u> of race, gender (and other aspects of difference), privilege, power, history, cumulative impact, disproportionate burden, and the systemic/field dimensions of change and experience*;
3) *Strategic <u>catalyzing</u> of dormant levers of change AS WELL AS the <u>removal</u> of blockages to healthy flow in a system*; and
4) *Uses <u>qualities</u>, dispositions, <u>practices</u> and <u>activities</u> of courage, strategic & healthy engagement with conflict, dauntlessness, and rigorous compassion.*

High Wire Act

Any comprehensive, deep EECM™ process, especially in large and/or highly influential systems, often under situations with long-standing trauma and/or dysfunction. I often call these "*Ocean*" processes, as opposed to "*Toe-Dip*" or "*Pool*" processes and approaches, which can also be catalytic but are not system-wide. (See the *Equity Capacity Building Framework* in the Appendix for more on "Ocean," "Toe-Dip" & "Pool.")

Reckoning

Begins with in-depth, tailored Equity Assessment in EECM™ and is deepened in the "Alignment" portion of the process. While "Reckoning" is not the ultimate destination, *it is a key juncture on the journey* of equity transformation. If Reckoning is not sufficient as determined by the system itself, the system may not heal (adequately). The equity practitioner(s) needs to know: *how to support* the system to get to sufficient Reckoning; *how to know* if the system is progressing in the right *direction* and at a helpful *pace*; and how to *unstick* the system if things get bogged down on the journey.

Rigor with Kindness™

The need for and practice of "Rigor with Kindness™" shows up more profoundly in EECM™ *Alignment* processes and *Equity Coaching*. Inspired by specific methodologies in the author's 25-year Tibetan Buddhist and African-based practice and ordination, the term Rigor with Kindness™ supports systems to grow beyond surface "niceness" or overly/false "polite" culture to greater depth & candor with compassion. The capacity, stamina and skill of the equity practitioner needs to sufficiently exhibit these skills for the benefit of the system.

Spectrum

Refers to at least two concepts: 1) the white dominant-to-social justice "Spectrum/Continuum" of system types (i.e., the 101-202-303 Spectrum; see the *Equity Capacity Building Framework* in the Appendix); and 2) the "Spectrum/Range" of skills, capacities and approaches that equity practitioners may use (hopefully) in complementary fashion to support a system's healing and healthy functioning.

Equity Stance

An organization or system's: *vision* for equity both within the organization/system and in its external work; its *values*, beliefs, assumptions, *commitments*; and how organizational/system members & participants are *expected* and *supported* to conduct themselves in relation to each other, partners, and external work. Individuals and teams/departments may also develop "*Equity Stances*" in relation to their own equity growth and journeys that *nest* within the larger system's journey.

"Stance"/"posture" may be written but is also an internal *disposition* and set of *strategies* that reflect the individual's or system's growing strength, confidence and courage, deepening knowledge, skill and commitment, and their evolving, equity-embedded action in the world, for life. Developing, committing to, iterating, and working to embody an "Equity Stance" is core to any formal or informal leadership or change agency role in an organization, community, network or group committed to social transformation and justice.

Value-Hierarchy

The false (and often unconscious) assumption or belief that, because different skill sets or capacities are *different* (and hence, may be more or less *helpful* or *appropriate* to support system transformation at any given time) – they are less *valuable*. Conscious or unconscious "Value Hierarchies" may exist across the 101-202-303 Spectrum, and/or about the Spectrum/Range of skills and capacities equity practitioners may bring to EECM™ processes, and/or about "traditionally" dominant or non-dominant ways of communicating, analyzing, understanding and otherwise displaying our wisdom and gifts, or other areas. Value Hierarchies may be consciously or unconsciously directed outwardly, or inwardly at ourselves as a result of the legacy of structural oppression, or otherwise not recognizing and unleashing our innate value and worth.

Working Agreements

Equity Teams/Workgroups/Steering Committees/Taskforces and entire organizations typically develop, ratify, and use meaningful "Working Agreements" in EECM™ processes. Such Agreements must be *strong* enough, *precise* enough, and *effectively engaged* to carry a system through a deep equity transformation journey. Hence, such Working Agreements are "live" (not perfunctory), and may hold not only the Team/Workgroup, but potentially the entire organization/system for the duration of the process and potentially *perpetually*, until they no longer need to look at a 'list' because they are actually embodying the Agreements.

About Sheryl Petty
& Movement Tapestries

Sheryl Petty, Ed.D., Founder & Principal of Movement Tapestries, has worked in organizational development, systems change, equity, education, and field building for nearly 30 years. She currently consults with national and international nonprofits/NGOs, philanthropic institutions, government agencies, colleges and universities on comprehensive equity transformation processes and field alignment. She has planned, designed and facilitated trainings and equity-based planning processes with thousands of practitioners, staff, community members, advocates and boards across the U.S. and other countries. Sheryl holds degrees in Mathematics, Systematic & Philosophical Theology, and a doctorate in Leadership & Change. She is also a certified yoga asana instructor, and is ordained and teaches in Tibetan Buddhist (Vajrayana/Nyingma) and indigenous African-based (Yoruba/Lucumi) traditions, which she has practiced for over 25 years.

She was formerly a Principal Associate at the *Annenberg Institute for School Reform* at Brown University, was also a Fellow at Stanford University's *Center for Opportunity Policy in Education,* and was Adjunct Faculty at *Teachers College*, Columbia University where she taught on Leadership, Systems Change & Equity. She is currently a Fellow with the Mind and Life Institute. Sheryl also publishes, engages in public speaking, and co-leads convenings for practitioners in the fields of systems change, change management, equity, and inner work/contemplative practice. Her focus is on supporting the alignment efforts of practitioners, advocates and community members to heal and unleash our most vibrant selves, transform our social systems, and improve our collective life.

MOVEMENT TAPESTRIES
WEAVING PERSONAL TRANSFORMATION & SOCIAL SYSTEMS CHANGE

About Grantmakers for Effective Organizations

Grantmakers for Effective Organizations is a community of funders committed to transforming philanthropic culture and practice by connecting members to the resources and relationships needed to support thriving nonprofits and communities. We envision courageous grantmakers working in service of nonprofits and communities to create a just, connected and inclusive society where we can all thrive. With more than 6,000 grantmakers who belong to philanthropic organizations of all sizes and types across the globe, we work to lift up the grantmaking practices that matter most to nonprofits and that truly improve philanthropic practice.

Since 1997, GEO has provided opportunities for grantmakers to come together to share knowledge and inspire each other to act. We recognize that being in community with other grantmakers, learning alongside our peers, is what helps us achieve the changes we want to make. Knowing better is not enough to do better — we know it takes more than knowledge to change. It takes intentional attention to culture, change management and learning alongside others.

Working with our members, we design conferences focused on exploring the latest challenges, foster peer connections and learning through member networks, and craft publications that frame key issues and highlight examples from across the field. Through these means, GEO creates the forum for grantmakers to hear from and absorb actionable information and insights from experts across the philanthropic and nonprofit sectors. Together, we are learning more about what works and applying our knowledge and resources to improve our communities.

GEO would like to extend a special thank-you to the funders that have supported us with major grant support.

- Angell Foundation
- Barr Foundation
- Blue Shield of California Foundation
- Borealis Philanthropy
- The California Wellness Foundation
- Casey Family Programs
- Charles and Lynn Schusterman Family Philanthropies
- Conrad N. Hilton Foundation
- The David and Lucile Packard Foundation
- Evelyn & Walter Haas Jr. Fund
- Ewing Marion Kauffman Foundation
- Ford Foundation
- Fund for Shared Insight
- John D. and Catherine T. MacArthur Foundation
- Omidyar Network
- Robert Wood Johnson Foundation
- Stupski Foundation
- Surdna Foundation
- Weingart Foundation
- Wellspring Philanthropic Fund
- The William and Flora Hewlett Foundation
- W.K. Kellogg Foundation

RESOURCES

These are a few of the resources that were on my mind in the writing of this document. Some are organizations, some are tools, and some are frameworks and other publications. Some are **equity-specific**; some are **change management-specific** (without explicit attention to intersectional equity); and some are both. Undoubtedly, there are many other useful resources not listed here. I hope folks continue to share more as we look further into the intersection of deep equity and change management together…

AORTA (Anti-Oppression Resource & Training Alliance), https://aorta.coop/

CoCreative: Collaborative Innovation for Shared Prosperity, Equity & Sustainability, https://www.wearecocreative.com/tools

Crossroads Antiracism Organizing & Training, https://crossroadsantiracism.org/

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Deep Equity Practitioner Network (DEPn)

Deepa Iyer, *SolidarityIs*, and Building Movement Project. *Mapping Our Roles in Social Change Ecosystems* (2020). https://buildingmovement.org/our-work/movement-building/social-change-ecosystem-map/

Equity in the Center. *Awake to Woke to Work: Building a Race Equity Culture.* https://equityinthecenter.org/aww/

Equity in the Center. *Race Equity Cycle Pulse Check™.* https://equityinthecenter.org/race-equity-cycle-pulse-check/

Gazmuri, Singhashri (Kica), Sheryl Petty and Ed Porter. *The Equity-Driven Systems Change (ESC) Model: A Toolkit for Improving Institutional Practice and Student Outcomes.* California Tomorrow, December 2010. https://skylinecollege.edu/seeed/assets/resources/ESC-Toolkit.pdf

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Meadows, Donella. *Dancing With Systems.* Retrieved from: https://donellameadows.org/archives/dancing-with-systems/

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Petty, Sheryl and Mark Leach. Systems Change and Deep Equity: Pathways Toward Sustainable Impact, Beyond "Eureka!," Unawareness & Unwitting Harm. Change Elemental, 2020.

Philanthropic Racial Equity (PRE), https://racialequity.org/

Potapchuk, Maggie. *"Operationalizing Racial Justice"* – two versions:
- Version for nonprofits: https://www.mpassociates.us/uploads/3/7/1/0/37103967/operationalizing_racial_justice_-_np_edition._mpassociates._final_draft_aug_20.pdf
- Version for philanthropy: http://www.mpassociates.us/uploads/3/7/1/0/37103967/operationalizingrj.mpassociates.12.19.final.pdf

Suarez, Kerrien with Ericka Hines. "*So You Want to Hire an Equity Consultant.*" Equity in the Center, 2019. https://www.wokeatwork.org/post/so-you-want-to-hire-an-equity-consultant

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FRAMING THE "WHAT":
Components of Deep Equity Capacity Building

by Sheryl Petty, Movement Tapestries in partnership with Elissa Sloan Perry, Change Elemental
January 2020

Last fall, we hosted a 2-day convening of many national and global Deep Equity practitioners who have a long-term practice, systems change lens, and grounding in equity and liberation[1] (including but going well beyond "diversity" and "inclusion"). While this convening did not (and could not) include <u>all</u> those we know (and know of), we sought to advance our collective learning, practice, and coordination, building on gatherings of our peers over the last few years.

We offer this brief piece to share some components of the **framework** offered at the gathering, to help advance the field, and to externalize our thinking for our partners and peers. This blog is specifically

designed for: those who participated in the Fall 2019 convening; those who were invited but could not make it; and those Deep Equity capacity building and systems change practitioners who have recently come onto or been returned to our radar. We humbly offer our thinking not as "the" way to approach deep equity transformation, but as important learning from our practice with clients and partners in the field.

Equity Capacity Building Convening, New Orleans, 2019

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[1] See for instance: "*Creativity, Spirituality and Liberation: A Personal Reflection Grown in Communion With Many Souls*," by E. Sloan Perry, November 2017.

Components of Equity Capacity Building

In our work, we focus on six components of Deep Equity capacity building:
1. *Type*
2. *Readiness/Difficulty*
3. *Depth & Intensity of Intervention*
4. *Phase*
5. *Role*
6. *Inner Work*

1. TYPE	*White Dominant-to-Social Justice Spectrum / aka "101-202-303"* *(or "101-to-303" for short)*
2. READINESS / DIFFICULTY	*Highly-Ready to Not-Ready (Lighter-to-Heavier Lift)* *(looks different depending on 101, 202 or 303)*
3. DEPTH & INTENSITY OF INTERVENTION	• *Kiddie Pool / Toe-Dip: can be catalytic or not; "light touch" may or may not mean "shallow"* • *Olympic Diving Pool: focused on multiple aspects of systems* • *Ocean: transformation at scale; whole systems; Internal / Individual, Interpersonal, Institutional & Societal*
4. PHASE	• *Early/Just-Beginning: Year/Phase 1-2* • *Multi-Year Implementation: Year/Phase 3+*
5. ROLE	• *Transformation Consultants (w/individuals, whole orgs, staffs, boards, & networks)* • *Field Builders* • *Researchers* • *Trainers* • *Funders* • *Builders of Capacity Builders* • *Organizers* • *Inner Work Practitioners / Healers* • *Policy & Advocacy* • *Artists, Narrative & Cultural Workers* • *Other?*
6. INNER WORK	*Attentiveness to the relationship between Healing, Wellness & Equity – via sacred or secular practices engaged with depth and regularity – to promote:* • *Refueling & replenishing,* • *Clearing, channeling & focusing intense emotional energy for grounding & transformation* • *Synergy and alignment* • *Healing rifts inside ourselves, our organizations, our networks & at movement levels*

1 & 2. Type & Readiness / Difficulty

"**Type**" is a primary way we use to categorize our equity work. For us, *Type* refers to where a client or partner falls on the white dominant-to-social justice spectrum. We refer to these different types of **individuals, organizations and networks** as **"101, 202 or 303"** for short. We note that, in order to achieve our mission of love, dignity, justice and thriving individuals and communities, who share our gifts for the liberation and benefit of all – there is a need for equity capacity building work **across the full 101-202-303 spectrum**.

"**Readiness/Difficulty**" – as a further delineation of "Type" – refers to different degrees of *heavier or lighter "lift"* in terms of the system's current state, and the complexity and difficulty that will need to be addressed to support the 101, 202 or 303 system to evolve toward greater equity, compassion and liberation. We note that in the course of our lives, we all may have worked in, lived in and/or embodied various parts of this 101-202-303 spectrum. Every part of the spectrum requires compassion and humility to foster transformation.
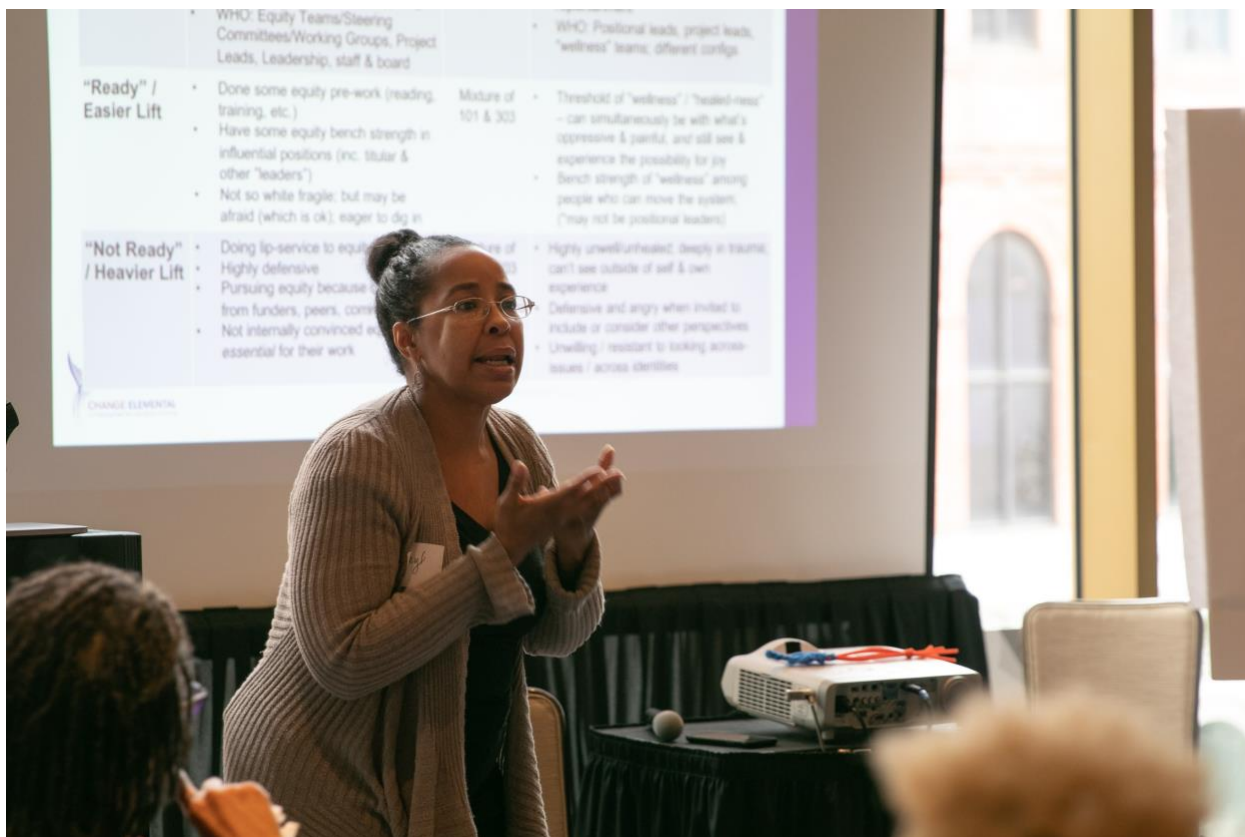
Sheryl Petty, Sharing the "Type & Readiness/Difficulty" Spectrum, New Orleans, 2019

The table below summarizes key aspects of our thinking and practice along this spectrum:

	"101" Individuals, Organizations & Networks	**"202"** Individuals, Orgs & Networks	**"303"** Individuals, Organizations & Networks
Characteristics	• White dominant (*not necessarily white-led; may include multiracial people at various levels of the system) • Fewer numbers globally • Focused on diversity, equity & inclusion (DEI) • Greater disconnection from Source • Work here (can be) more depleting for the consultant • **Who:** Equity Teams/Steering Committees/Working Groups, Project Leads, formal Leadership, staff & board	Mixture of 101 & 303	• Multi-identitied or single racial Black, Indigenous or people of color (BIPOC) • Greater number of people globally • Larger numbers globally • Focused on social justice and "liberation" • In general, have more connectedness to Source • Work here (can be) depleting with some replenishment for the consultant • **Who**: Positional leads, project leads, "Wellness" teams; different configurations
"Ready" / Easier Lift	• Have done some equity pre-work (reading, training, etc.) • Some equity bench strength in influential positions (including titular & other "leaders") • Some white fragility[2]; may have fear (which is ok); eager to dig in	Mixture of 101 & 303	• Threshold of "wellness" / "healed-ness" – can simultaneously be with what's oppressive & painful, *and* still see & experience the possibility for joy • Bench strength of "wellness" among people who can move the system; (*may not be positional leaders)
"Not Ready" / Heavier Lift	• Lip-service to equity • Highly defensive • Pursuing equity because of pressure from funders, peers, community • Not internally convinced equity is *essential* for their work	Mixture of 101 & 303	• Highly unhealed; deeply in trauma; cannot see outside of self & own experience • Defensive and angry when invited to include or consider other perspectives • Unwilling / resistant to looking across-issues / across identities

Each **Type and Readiness level require specific types and intensities of interventions**, to which we turn in the next section.

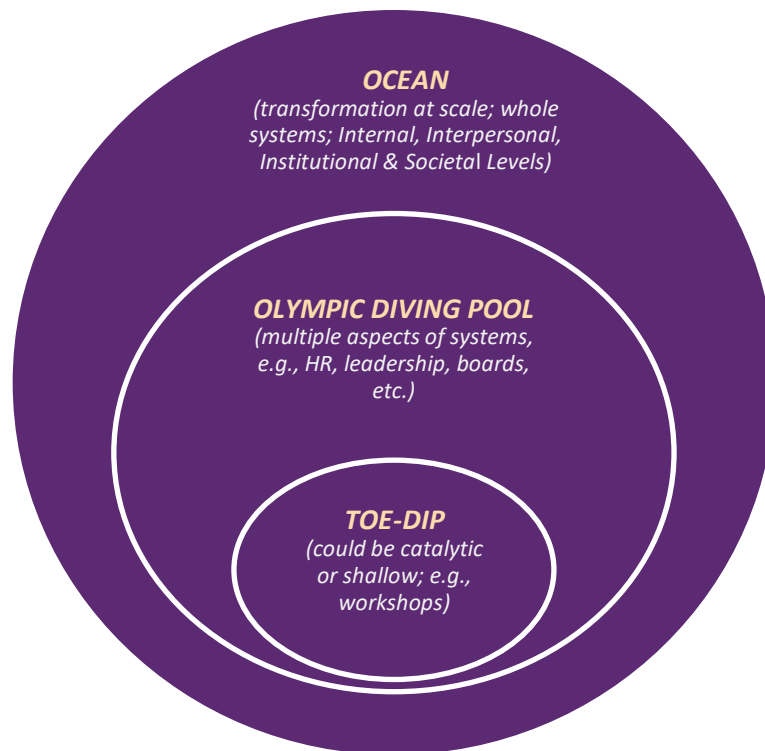## 3. Depth & Intensity of Intervention

In this <u>next</u> framework component, we share three categories for the various Depth and Intensity of Interventions we see offered in the field, each of which (*offered with high quality*

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[2] See e.g., https://robindiangelo.com

and deep equity[3]) is appropriate and can be beneficial at different times to support an **individual's, organization's or network's** journey:

- *Toe-Dip* – e.g., single workshops or trainings; which may be shallow or catalytic
- *Olympic/Diving Pool* – focused on one or several aspects of a system (e.g., HR, leadership, boards, specific acute issues, etc.); may last several days, weeks or months
- *Ocean* – focused on whole systems transformation at scale, including internal, interpersonal, institutional & societal levels, over multiple years

Each of these **types of Intervention can be offered all along the 101-202-303** spectrum.

OCEAN
(transformation at scale; whole systems; Internal, Interpersonal, Institutional & Societal Levels)

OLYMPIC DIVING POOL
(multiple aspects of systems, e.g., HR, leadership, boards, etc.)

TOE-DIP
(could be catalytic or shallow; e.g., workshops)

Equity-embedded *organizational development (OD)* and equity-driven *change management* are part and parcel to "Ocean" work, because it is transformation of entire systems. "Ocean" and "Olympic Diving Pool" intervention levels include individual and joint **coaching** and group **facilitation**. Coaching may (but not necessarily) be part of "Toe-Dip" activities as well.

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[3] See for instance: "*Seeing, Reckoning & Acting: A Practice Toward Deep Equity,*" by S. Petty, September 2016, and "*Advancing Deep Equity,*" by Change Elemental."

4. Phase

For us, **Phase** refers to where in the cycle of evolving practice and interventions an organization or network is in its equity and liberation development:

- ❖ **Phase/Year 1: Start-Up** typically includes the following foci in our work:
    - o Comprehensive (Qualitative & Quantitative) Assessment & Building Shared Understanding of Current State Across the System (board and staff)
    - o Building Alignment, Seeing from Multiple Perspectives & Navigating Power
    - o Building Courage, Strength and Stamina; Reckoning & Healing
    - o Creating a Sense of the Possible; Advancing Initial Culture Shifts
    - o Equity Education
    - o Individual, Joint & Team Coaching
    - o Intra-Personal Experimentation with New Behaviors and Practices
    - o Ratifying Preliminary Priorities & Pathways Forward (vetting across the whole system)

- ❖ **Phase/Year 2: Initial Implementation** typically includes some of the following foci, which are ***identified, prioritized and ratified via strategically designed and facilitated half-to-multi-day "Alignment" conversations among concentric participants of the system***:
    - o Structures, Programs, Policies, Processes & HR
    - o Leadership & Management (generic AND equity-based)
    - o Org/Network Culture, Relationships & Teaming
    - o Governance
    - o Finance & Investment Approaches
    - o Communications & Ops
    - o Partnering
    - o Metrics at Individual/Team/Org/Network & Field Levels
    - o Continued Coaching & Additional Equity Education
    - o Iterating Personal, Interpersonal, Team-Based, Org-Wide & Systems-Level Experiments in All the Above Areas (Simple-Complicated-Complex[4])

- ❖ **Phase/Year 3+: Deeper Implementation**
    - o Embedding further along the identified priority areas
    - o Continued Equity Education
    - o Further Inner Work & Healing (at individual, team, organizational and network levels)

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[4] Inspired by *National Equity Project's* "Leading for Equity" Framework & Cynefin.

5. Role

We mapped ourselves in the gathering according to our *history*, *current* practice, and *interest* in deepening our work in the following roles in Deep Equity capacity building. We recognize that these are multiple doorways into deep equity transformation practice:

- Transformation Consultants (with individuals, whole organizations [teams, staffs, boards], networks)
- Field Builders
- Researchers
- Trainers
- Funders
- Builders of Capacity Builders
- Organizers
- Inner Work Practitioners / Healers
- Artists, Narrative & Cultural Workers
- Policy & Advocacy

6. Inner Work

As an organization (echoing work in which many others in the field have been engaged[5]), we are deepening our commitment to and collective resources for cultivating attentiveness to the **relationship between *healing, wellness, and equity*,** in order to promote:
- Refueling and replenishing,
- Clearing, channeling and focusing intense emotional energy for grounding & transformation,
- Synergy, alignment, and
- Healing rifts inside ourselves, our organizations, in our networks and at movement levels.

We see the need for focusing on Inner Work prompted by a set of common, easily recognizable experiences at individual and group levels in the work of many equity and social systems change practitioners:

At Individual Levels:
- Checking out; shutting down
- Normalized over-work habits; burnout
- Daily & intergenerational assault and trauma
- Feeling scattered, ungrounded or overwhelmed

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[5] Namely *Movement Strategy Center*; john a. powell's work and the *Othering & Belonging Institute*; the network and resource hub *White Awake*; and *Hidden Leaf Foundation*; among others.

- Deepening capacity for cross-cultural literacy & advancing equity
- Ability and willingness to see differently and embrace change needed internally

For Groups & Organizations:
- Differing visions, values & notions of "success"; loggerheads
- Misunderstandings, misinterpretations & stalemates
- Perceived or actual disrespect; turf wars; ego trips
- Fractures / disintegrating collaborative work

We are deepening our focus on the following **aspects of Inner Work** as we support organizations and networks in Deep Equity:
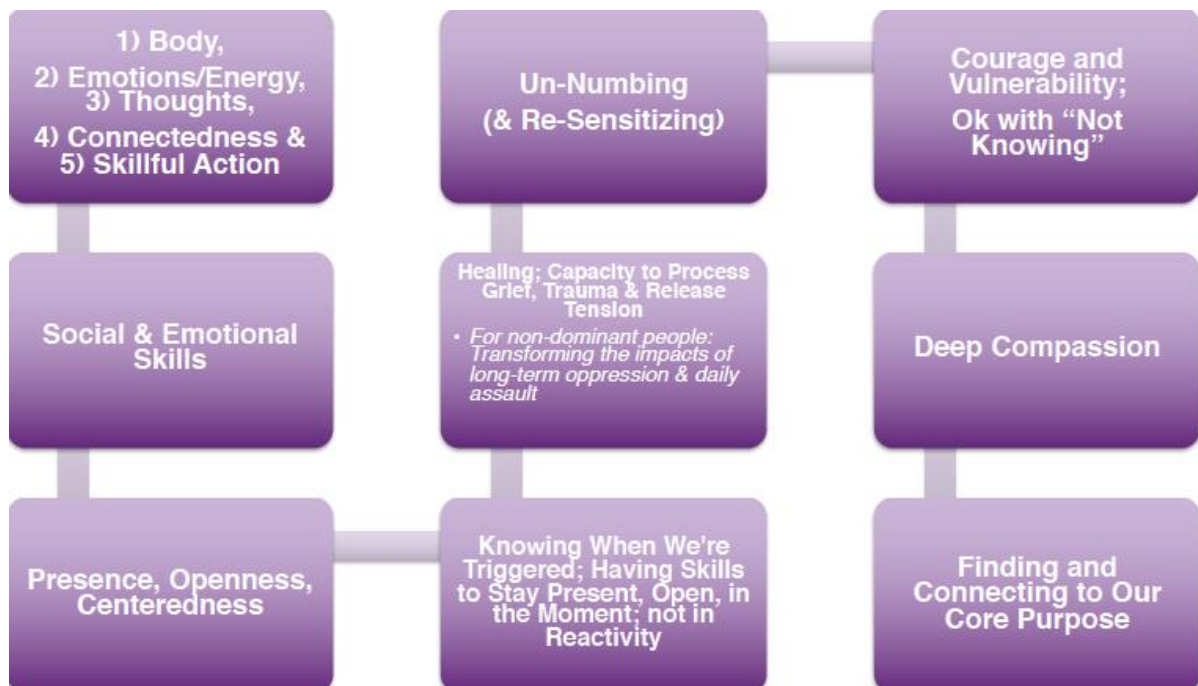
Individuals and organizations use multiple approaches to deep Inner Work practice and capacity including:
- Taking *real* breaks
- Walks in nature; gardening
- Journaling
- Drawing, painting
- Physical practices (e.g., yoga, jogging, swimming, martial arts)
- Sacred & secular tools (e.g., meditation; spiritual community)
- Spending time with loved ones
- Formal and informal training
- Many other practices, approaches, tools, etc.

DESIRES / GOALS
- Social & emotional skills
- Presence, openness, centeredness
- Knowing when we're triggered & having skills and tools to stay engaged (& knowing how this may appear different in different cultures)
- Healing; capacity to process grief, trauma & release tension
- Courage and vulnerability; ok with "not knowing"
- Deep connection and compassion
- Moving from more intentional "choice" vs. unconscious "habits"
- Striving toward or embodying continuous "liberating practice"

PRACTICES & APPROACHES
- Sacred or secular traditions
- Silent or loud(er)
- Solo, small or large group (formal & informal ceremony; & cultivating relationships)
- Nature-based / engaging the elements
- Artistic
- Energetic
- Body-based / somatic
- Meditation, reflection & contemplation
- Long or short in duration (moments, hours, days, months, years, lifetime)
- Etc.

7 DIMENSIONS OF OUTCOMES
1. Connection to Source
2. Healing and Health
3. Attention to Sacred ("Best Self")
4. Noticing and Skill with Difficulty inc.:
   - *Triggers, Sparks, Obstacles and Trauma*
   - *"Turning Toxins into Nutrients" or "Poison into Nectar"*
5. Compassion for Self and Others
6. Presence and Awareness ("Quality of Being")
7. Unimpedednes

The following publications might be useful for furthering practice and deepening the relationship between Equity and Inner Work:

- "*Toward Love, Healing, Resilience & Alignment: The Inner Work of Social Transformation & Justice*," by S. Petty, M. Leach & K. Zimmerman, *NonProfit Quarterly,* 2017.
- "*Social Justice, Inner Work & Contemplative Practice: Lessons & Directions for Multiple Fields*," ed. S. Petty, by the *Initiative for Contemplation, Equity & Action (ICEA),* 2017.

Final Thoughts

The Fall 2019 Deep Equity Capacity Builder gathering used the above components to map those who participated according to:

- Our current practice
- Desired areas of practice, where we'd like to grow/learn or partner with others
- Demand we see in the national field, at this time

Follow-up gatherings (hosted by others) have already occurred and additional ones are planned which seek to continue to weave work into previous and upcoming discussions to advance Deep Equity capacity building practice and positive impacts, field-wide.

We hope the above framework components help to promote further discussion and synchronization of:

- What we (as Deep Equity capacity building practitioners) are **doing** (as individual organizational, network, and community-based practitioners, and as a field),
- What is **quality** work at depth,
- How we are making **choices** (about partnering, scoping, interventions and course-corrections), and
- Where we can and need to **refine or strengthen** our practice.

We also hope this work deepens our ability to *coordinate* for the benefit of communities, organizations and networks around the country and world. We offer this with gratitude for all who attended last fall and contributed to our thinking and practice over the years!

MOVEMENT
TAPESTRIES