



Equity Assessment Report - Phase One (draft)

The Arc of Opportunity

Prepared for:
Mary Heafy, President and CEO
Marshall Gaye, VP of Human Resources
Equity Team
July 2022

Called 
to  Justice

Effective | Innovative | Integrity

**The Arc of Opportunity CT J Observe Mtgs****Tue Aug 17, 2021**

12:30pm -2:30pm The Arc (Exec Mtg)

Calendar: The Arc of Opportunity Observe Mtgs

Wed Sep 15, 2021

11 :30am - 1 pm The Arc (HR Team)

Calendar: The Arc of Opportunity Observe Mtgs

Tue Sep 21, 2021

4:15pm - 8:30pm The Arc (BoD & Strategic Planning)

Calendar: The Arc of Opportunity Observe Mtgs

Wed Sep 22, 2021

1 0am - 11 am The Arc (Home Based Support Team)

Calendar: The Arc of Opportunity Observe Mtgs

Tue Sep 28, 2021

11am - 12pm -cancelled not replace-The Arc (Day Sei Mtg)

Calendar: The Arc of Opportunity Observe Mtgs

1 pm - 2pm The Arc (Health/Safety Comm.)

Calendar: The Arc of Opportunity CT J Observe Mtgs

Wed Sep 29, 20217:30am - 8:30am The Arc (Day W Staff Mtg)

Calendar: The Arc of Opportunity Observe Mtgs

Tue Oct 5, 2021

1 pm - 3pm Need to reschedule The Arc (Exec Mtg)

Calendar: The Arc of Opportunity Observe Mtgs

Wed Oct 6, 2021

8:30am - 9:30am The Arc (IHS Team)

Calendar: The Arc of Opportunity Observe Mtgs

11 am - 12pm -need to reschedule-The Arc (Risk Man

Calendar: The Arc of Opportunity Observe Mtgs

4:30pm - 5:30pm The Arc (Human Rights Comm)

Calendar: The Arc of Opportunity Observe Mtgs

Tue Oct 12, 2021

8am - 1 0am The Arc (Finance Mtg)

Calendar: The Arc of Opportunity CT J Observe Mtgs

Wed Oct 13, 2021

1 0am - 11 am Need to reschedule - The Arc (HBS Nu

Calendar: The Arc of Opportunity Observe Mtgs

Thu Oct 14, 2021

4pm - 5pm The Arc (Investment Mtg)

Calendar: The Arc of Opportunity CT J Observe Mtgs

Mon Nov 8, 2021

2pm - 3pm The Arc (DEi)

Calendar: The Arc of Opportunity Observe Mtgs

Tue Nov 9, 2021

12pm -1 :30pm The Arc (DHCBS Residential Leadership)

Calendar: The Arc of Opportunity Observe Mtgs

Tue Nov 30, 2021

11 am - 1 pm The Arc (Senior DD Residential Leadership)

Calendar: The Arc of Opportunity CT J Observe Mtgs

Wed Dec 1, 20219:30am -10:30am The Arc (Individual I Home Supports Team)

Calendar: The Arc of Opportunity CT J Observe Mtgs

10:30am - 11 :30am The Arc (HBS Case Managers)

Calendar: The Arc of Opportunity Observe Mtgs

Thu Dec 2, 2021

1 0am - 12pm The Arc (Residential Manager Mtg)

Calendar: The Arc of Opportunity CT J Observe Mtgs

Tue Dec 7, 2021

11 am - 12pm Need to reschedule - The Arc (Residential Nursing Mtg)

Calendar: The Arc of Opportunity CT J Observe Mtgs

12pm - 2pm The Arc (Home Based Supports Sr. Leadership Mtg)

Calendar: The Arc of Opportunity Observe Mtgs

Wed Dec 8, 2021

10:30am -12:30pm The Arc (Home Based Supports Nurse's Mtg)

Calendar: The Arc of Opportunity CT J Observe Mtgs

Tue Dec 14, 202112pm -2pm Already observed -The Arc (Dix Home Community Based Support LeadershipMtg)

Calendar: The Arc of Opportunity CT J Observe Mtgs

Tue Dec 21, 2021

2pm - 3pm The Arc (Incident Review Comm.)

Calendar: The Arc of Opportunity Observe Mtgs

Thu Jan 13, 2022 (postponed to Feb)

5pm - 6pm Investment COMM

Calendar: The Arc of Opportunity CT J Observe Mtgs

May 10-12, 2022

Onsite observational meetings (14)



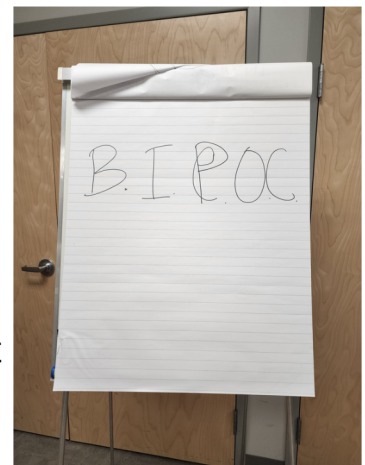
Methodology:

Proprietary rubric of observation criteria utilized to assess areas of organizational culture. Assessment is based on three types of observational behaviours as related to organizational equity:

- Homeostasis: organization is operating based on a “this is how we’ve always done it model” and is comfortable with how it is running.
- Multicultural: Organization is aware that there are different cultural needs/assets within the organization and makes efforts to recognize those needs.
- Actively Anti-Racist (Equity based): Organization has policies and procedures to combat racism, promote equity, and support staff in the process.

Observations:

Thank you for the honor and opportunity to join in your community over the months of August 2021 through May 2022. It was a gift to be so warmly welcomed to committee, board, department, and team meetings. Further, CTJ appreciates the grace given by everyone in shifting timelines as needed for observational meetings. It is a testament to the skills acquired during the pandemic which have allowed us all to see that rigid adherence to guidelines does not equate with successful work product and in fact it is the relationships which are tended that are the ultimate measure of success.



(Reminder to ourselves to always spell out acronyms the first time they appear. Always assume someone new is in the room!)



Observations (cont'd):

The following observations and strategies should be viewed as **ONE part** of the journey of The Arc of Opportunity in its work towards forming an actively equity based organization.

In observation of over 40 hours of meetings, it is clear there is a wide range of skills, talents, lenses, and learnings in use at The Arc. Let me be clear that it was also a blessing to observe so much care and consideration for team members, clients, and community. Celebrations of personal and professional achievements were made and care and compassion shown for those in distress. What follows in this report should be read with care and compassion for anyone who sees themselves and others in the descriptions; both those which could be termed “good” and “bad” behaviours but which I hope by the end will just be termed “committed” behaviour. For it is clear everyone observed cares deeply for The Arc of Opportunity community.

The Arc culture includes many elements of white supremacy culture, many desires to move away from this culture, and many questions as to how to do so as well as IF doing so should be a priority. White supremacy culture characteristics are summarized in the work of Tema Okun and Kenneth Jones. In short it espouses that there is unwritten code as to what “our” highest ideals are in organizations. These include:

- | | |
|-----------------------------|-------------------------|
| Perfectionism | Sense of Urgency |
| Defensiveness | Quantity over quality |
| Worship of the written word | Only one right way |
| Paternalism | Either/or thinking |
| Power hoarding | Fear of open conflict |
| Individualism | Progress is bigger/more |
| Objectivity | Right to comfort |



Observations (cont'd):

In observing the meetings of The Arc, it was clear that all of these characteristics were present. I am tempted here to make note of specific observable instances but I'm going to refrain from doing so because I do not want the reader to get caught up in "oh but really, that was Mr. X and they didn't mean that." These behaviors were not singled out to any one person but were an observable part of the culture of The Arc throughout its operations and processes.

The results of this culture were also observable. People who were most adept at continuing the culture have been given positions of authority (leading meetings, taking notes, giving reports, collecting materials, etc.) Those who were least adept at continuing that culture and/or who suggested other avenues of processes were often met with invitations to spend MORE time and produce more work in order to first justify the need for change and then lead that change. Observed of those who hold marginalized identities were language (both verbal and nonverbal) which signaled frustration, distress, and challenge.

Also observed were a marked difference in meeting culture between those who have been at the center of The Arc's work towards equity and those further away from the center. This is not at all unusual for an organization as it begins systemic work towards equity.

There were many skill sets observed within The Arc community. These included:

- Active listening
- Challenging of assumptions
- Invitations to speak
- Care and concern for community
- Curiosity and wanting to get more information before decision making

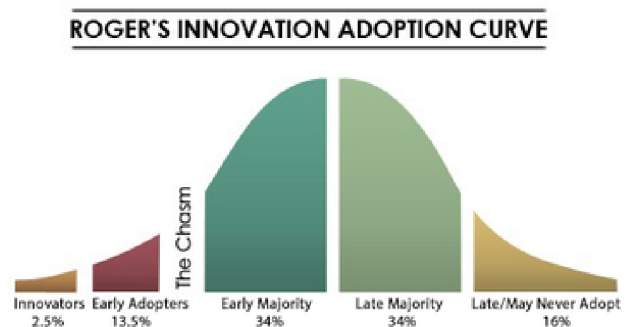


Observations (cont'd):

It is my belief that these skills are the beginning blocks to use in building an active shift in the culture of The Arc. There were also clear leaders who already possess a vision of wanting to shift the culture and who have begun organizing around that goal.

During my site visit in May, as well as during the observational meetings, one of the factors I was assessing was looking for **Indicators of Readiness**. These include (but are not limited to):

- Clearly articulated equity mission
- Significant percentage of early adopters (per Rogers Change Curve)
- Resources dedicated to equity mission



Many Indicators of Readiness were witnessed and what emerged from the site visit and observational meetings are the following themes:

- Excited to engage
 - many are excited to engage with an equity process
- Scared to say the wrong thing
 - Not from a fear of retaliation but rather from a not wanting to hurt friends/colleagues
- Didn't know Racial Equity was "a thing" at The Arc until last week
 - While this may be frustrating to those Early Adopters in leadership, this is a very common occurrence and simply means a communication channel needs to be created that is solely focused on the equity process and is easily accessible to the entirety of The Arc organization. This could be a page on the website, a dedicated newsletter, or other channel.



Observations (cont'd):

- Did someone do something wrong and that’s why we are doing this
 - Because of the rules/procedure/error/remediation process driven nature of the work of The Arc, it is not surprising that this emerged as a theme.
 - This was the one question that I engaged with directly throughout my visit to reflect back that “no, no one has done anything wrong, this is not the result of a particular incident, this is not a remediation process related to a specific incident” and otherwise assured staff that the equity process is something that is positive and being addressed on a systemic level
- Wonderings and feedback about caucuses
 - BIPOC caucus - greatly enjoyed and would like to do again
 - White folks unsure about their place in caucusing
 - Disability and LGBTQ appreciated being included as caucuses
- Timing around certification
 - Was upset at first and now glad because it gave a chance to get out of the minutia and into the missional
- What happens to staff who may resist or refuse to change
 - What is the expectations of behaviours and what are the limits
 - Change curve - there will always be those who do not come on the journey
 - Container to be built will include those who do not want to change and which identifies the expectations of behaviour. "We need not think alike to love alike"

(Staff: How do you feel talking about issues of race at The Arc)





Moving Forward:

There are several suggested strategies for moving forward. All of them include learnings around the “antidotes” to White Supremacy

Characteristics as suggested by Okun and Jones including creating:

- Culture of Appreciation
- Realistic workplans
- Understanding defensiveness and power
- Values statements
- Information sharing
- Many ways of getting to a goal
- Those who are affected by, make the decision
- More than two alternatives
- Power sharing as part of values statements
- Expect and embrace healthy conflict
- Evaluate and value teamwork
- Seventh Generation thinking
- World views
- Discomfort is the root of growth and learning

Phase 2 Assessment Learnings - Strategies and Tools for moving forward: Skill Building

Strategies

- **Leadership Development - level 1 (Tool Skill Building)**
 - How to lead meetings with an equity lens:
 - What are the null/implicit/explicit expectations of your meeting culture?
 - How do we identify those expectations?
 - Progressive stack – what is it and how can it be used for advancing equity in your meeting?
 - Process observation – what is it and how can it be used for advancing equity in your meeting?



Moving Forward (CONT'D)

Phase 2 Assessment Learnings - Strategies and Tools for moving forward: Skill Building

Strategies

- **Leadership Development - level 1 (Tool Skill Building)**
 - Unconscious bias:
 - What is unconscious bias?
 - How do you identify it at work in your culture?
 - What to do about it when you identify it?
 - White Supremacy Culture Antidotes: For all the characteristics of White Supremacy Culture, there are also antidotes. We will examine the three most relevant to The Arc's next phase:
 - Embrace discomfort / embrace conflict
 - Cost/benefit analysis are moral decisions
 - Effective > Efficient leadership

- **Leadership Development - level 1 Common Readings:**
 - Suggestions:
 - Salsa, Soul and Spirit, Juana Bordas
 - Emergent Strategy, adrienne maree brown
 - Both/Either - led by a facilitator with a facilitator guide

- **Leadership Development - level 1 Assessment tool possibility**
 - Intercultural Development Continuum assessments
 - Harvard Tool
 - Intercultural Development Inventory (IDI)



Moving Forward (CONT'D)

- **Leadership Development - level 2 Skill Building**
 - Organizational strategy Workshop:
 - Caucusing - why do we do it and how does it help us
 - Advocacy - how to follow Black and brown leadership
 - Self care and advocacy Workshop (BIPOC only):
 - Anti-Racism for the long haul
 - Why “self-care” should actually be “community care”
 - Intercultural Development Continuum assessments and leadership
 - Having taken the IDI or similar, how do we use these assessments to move into the anti-racism work.
- **Budget Allocation Analysis - Level 2 Skill Building**
 - Policies - Capital, investment, etc.
 - Common read: Decolonizing Wealth, Edgar Villanueva
 - Questioning lenses
 - Review existing policy with the following lenses:
 - Who originally created this “wealth”?
 - How can it be leveraged for liberation?
 - Who has the moral authority to make decisions about its use?
- **Holding tension for growth - A LEADERSHIP RETREAT** to be held before each set of Level 1 and 2 Skill Building sessions. Growing into equity work is a journey, one that will cause discomfort. How does The Arc plan to hold the tension and answer the following questions:
 - What will this look like?
 - What will this feel like?
 - How will we know it’s working?
 - How do we support to those who will not join us?



As per the CTJ proposal and timeline, the above report is intentionally an outline intended for the steering team at The Arc of Opportunity. After the steering team has reviewed the outline, we will meet to discuss the outline. During that meeting we will determine which strategies will be most helpful during the Skills Building phase (Phase 2 Assessment Learnings). After that meeting I will add to this report and finalize it for use in preparations for Phase 2. I am excited to be on this journey with you and look forward to our conversation on Monday!

Yours in service,
Christina Rivera



(Staff: One word to describe The Arc of Opportunity culture)