



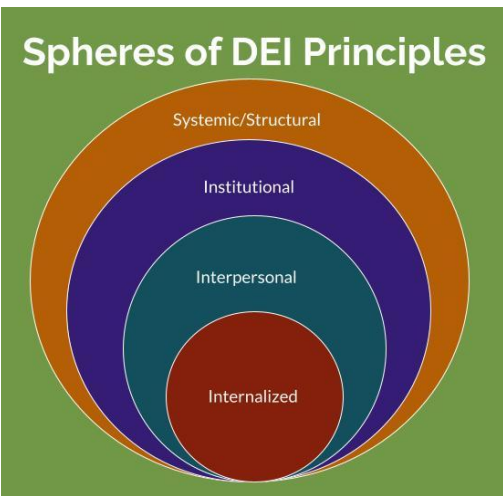
(Master) Organizational DEI Strategic Planning Workbook

Introduction

We are now at the halfway point of the Utah Farmers Market Network’s Diversity, Equity, and Inclusion Community of Practice. Thus far we have delved into some of the foundational concepts that social justice/anti-oppression work is built upon, beginning with a focus on the personal/internal understanding and commitment necessary to take on this work at the broader level. We want you to keep in mind [Paulo Freire](#)’s concept of praxis -- a continual process of learning, action, and reflection -- as you move through the next phases of this work. Embodying DEI in our personal lives is essential to transforming our organizations (and larger social systems), and both require long-term work.



This workbook is meant to serve as a guide for your organization’s DEI Strategic Plan, beginning with the personal and moving into the organizational and broader community contexts. We will help you along this process and encourage you to collaborate with one another within and between teams as much as possible.



As you dive into this workbook, remember that all of the [key concepts](#) we covered in our virtual gallery walk activity in Session 1 (*diversity, equity, inclusion, privilege, oppression, power, prejudice, discrimination, and intersectionality*) are cyclically embedded in and interrelated on every sphere of influence. Racism, for example, is internalized on the personal level through our thoughts and beliefs about specific races being inferior or superior to others; it is played out on the interpersonal level through microaggressions or outright discrimination; it is perpetuated on the institutional level in our workplaces, schools, and

communities; and is held in place by systemic and structural forces that privilege some groups over others.

We begin this DEI work on the personal level, as this is where we have the most power and influence. ***The work begins with us.*** Then we apply what we have learned to our interpersonal relationships with friends, family, and coworkers. Next we address how our institutions -- in this case our markets and market organizations -- can reflect DEI principles. The ultimate goal for real, overarching, long-lasting, widespread change is in combating the aspects of our systems and structures that perpetuate oppression (i.e. the food system or healthcare system).

While this work must ultimately begin with ourselves, within the internalized sphere, we must do the work within as many spheres as possible simultaneously -- for they are all functioning together to uphold the status quo, which privileges some to the detriment of others.

## Personal Context

*The purpose of this section is to review and synthesize all of the concepts we have covered in the CoP thus far in order to deepen your understanding and personal commitment to social justice and anti-oppression. **Fill out this section before Session 4 on September 15th and be prepared to discuss.** If there is more than one person from your organization participating in the DEI CoP, answer these questions individually within this shared document. We also suggest setting up a time to meet with your team to discuss your answers.*

1. Why do you personally care about diversity, equity, and inclusion? (Think about the [cases for DEI](#) from Session 1)
2. What would your daily life look like if you lived and worked in a more diverse, equitable, and inclusive place?  
Visioning suggestion: Close your eyes and imagine walking down the street in your neighborhood or city's downtown, going to the grocery store, walking by a public schoolyard or playground, entering your workplace. Who do you see? Notice the demographics of the people you see. How are people being treated? How does this scene differ from your current reality?
3. What would you gain from living and working in a more diverse, equitable, and inclusive place? (Think about [Peggy McIntosh's Invisible Knapsack](#))



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4. What would others gain from living and working in a more diverse, equitable, and inclusive place? (Again, think about Peggy McIntosh's Invisible Knapsack)
  
5. What is holding you back from living a more diverse, equitable, and inclusive life? (Think about your own intersectional identities and where they lie on the [Intersecting Axes of Privilege, Domination, And Oppression](#))
  
6. How do you think your personal commitment to diversity, equity, and inclusion will impact your organization's journey to being more diverse, equitable, and inclusive?
  
7. Which approaches appeal most to you as you practice allyship? (Think about this [Guide to Allyship](#), this Harvard Business Review [article on microaggressions](#), and Hollaback's Guide to [Bystander Intervention](#))
  
8. What is your plan for continuing to learn about diversity, equity, and inclusion? (Refer to our [DEI Resource List](#))
  
9. Who will your accountability partner be? (Think about your sphere of influence -- this could be another participant in the DEI CoP participant, a coworker, a friend, or a family member)

## Market Context

*The purpose of this section is to take an in-depth look at the current operating state of your market based on the data you collected during your Market Environment Scan(s) and do some preliminary brainstorming that will inform your DEI Strategic Plans and ultimately lead to goal-setting. **Answer the following questions before Session 6 on October 20th and be prepared to discuss.** If there is more than one person from your organization participating in the DEI CoP, answer these questions individually within this shared document. We also suggest setting up a time to meet with your team to discuss your answers.*



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1. Based on your scan(s), what do you see as the primary demographics of your market?
  - a. Vendors:
  
  - b. Customers:
  
  - c. Market staff and volunteers:
2. Is there a specific demographic you would like to target in your efforts of becoming a more diverse, equitable, and inclusive market? Why?
3. If you do want to target a specific demographic, is there further data you need to collect? How might you collect this data?
4. What is going well in terms of inclusivity at your market? (You can copy your answers from the last section of your scan and add more insights if you have them)
5. What would you like to see improve at your market in terms of inclusivity? (You can copy your answers from the last section of your scan and add more insights if you have them)
6. Based on these insights what would your market look like if it were a more diverse, equitable, and inclusive space?

Visioning suggestion: Close your eyes and imagine walking around your market. Who do you see? Notice the demographics of the vendors, customers, and staff you see. How are people being treated? How does this scene differ from your current reality?
7. What would your market gain from being a more diverse, equitable, and inclusive place?
8. What would others (vendors, customers, the community at large) gain from your market being a more diverse, equitable, and inclusive place?
9. What is holding your market back from being a more diverse, equitable, and inclusive space?



## Organizational Context

*The purpose of this section is to take an in-depth look at your market's larger organization based on the data you collected during your Organizational Scan(s) and do some preliminary brainstorming that will inform your DEI Strategic Plans and ultimately lead to goal-setting.*

***Answer the following questions before Session 7 on November 3rd and be prepared to discuss.***

*If there is more than one person from your organization participating in the DEI CoP, answer these questions individually within this shared document. We also suggest setting up a time to meet with your team to discuss your answers.*

1. Based on your scan(s), what do you see as the primary demographics of your organization?
  - a. Leadership/Governing Board:
  - b. Paid Staff:
  - c. Volunteers:
2. Can you speculate on the root cause(s) of why certain demographics are present or absent in different areas of your organization? *(Think specifically about the different demographics of people in paid and non-paid positions.)*
  - a. Customers
  - b. Vendors
  - c. Staff
  - d. Volunteers
  - e. Leadership/Governing Board
3. What is going well in terms of inclusivity at your organization?
4. What would you like to see improve at your organization in terms of inclusivity?
5. Taking into account the findings from your organizational scan, where do you think your organization falls on the [Continuum on Becoming an Anti-Racist, Multicultural Institution?](#)



6. What would your organization gain from being a more diverse, equitable, and inclusive place?
7. What would others (vendors, customers, the community at large) gain from your market being a more diverse, equitable, and inclusive place?
8. What is holding your market back from being a more diverse, equitable, and inclusive space?
10. What is the history of racism/anti-racism, equity/inequities, and inclusion/exclusion in your organization or network?
11. If this isn't your organization's first effort to address these issues:
  - a. What did you learn from prior efforts?
  - b. What has been successful?
  - c. Where have there been challenges or losses?
12. What is one thing you can do within your organization to positively impact diversity, equity, and inclusion?

## Community Context

*The purpose of this section is to take an in-depth look at your community based on the data you collected during your Community Scan(s) and do some preliminary brainstorming that will inform your DEI Strategic Plans and ultimately lead to goal-setting. **Answer the following questions before Session 8 on November 17th and be prepared to discuss.** If there is more than one person from your organization participating in the DEI CoP, answer these questions individually within this shared document. We also suggest setting up a time to meet with your team to discuss your answers.*



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1. Based on the demographic data you collected in your scan(s), what are the main differences between the US Census Data versus the preliminary data you collected during your market and organizational scans, especially as it relates to race? Which demographics are present in your community but not to the same degree in your market or organization?
2. What are your big takeaways from the Utahns Against Hunger Food Access Profile for your county? Based on the data, which demographics are most affected by food insecurity, poverty, etc? Can you identify any possible root cause(s) for this reality?
3. Based on the data you collected in the Community Scan, what are the big challenges facing your community (poverty, food insecurity, housing, etc.)? How might these affect people's ability to participate fully in their community and at your market/organization?
4. Based on your knowledge of current events in your community, what are some other challenges your community is facing (institutionalized racism, job shortages, housing crisis, etc.)? How might these affect your market/organization?
5. What are some positive things happening in your community right now and how might these affect your market/organization? Examples could include community programs and initiatives, new government leadership, local policy.
6. Based on the answers above, which demographic group(s) you would like to see participate more in your market/organization and why?
7. Can you speculate on why this demographic group(s) does not currently participate in your market/organization? How could you learn more?



## SMARTIE Goals

You may be familiar with SMART goals – Strategic, Measurable, Ambitious, Realistic, Time-Bound. We will be utilizing The Management Center’s SMARTIE goal, adding Inclusive and Equitable components to our SMART goals. Use the worksheet below to write out goals for each of the following spheres: personal, market, organizational, and community based on your scans and the context sections above. We will be scheduling individual meetings to discuss each of your goals and how we might support you in achieving them.

### SMARTIE Goals Worksheet

Goals are a concrete way to drive results, but without an explicit equity and inclusion component, goals won’t produce better outcomes for marginalized communities, address disparities, or support belonging. Introducing SMARTIE goals! SMARTIE stands for:

- S**TRATEGIC Reflects an important dimension of what your organization seeks to accomplish (programmatic or capacity-building priorities).
- M**EASURABLE Includes standards by which reasonable people can agree on whether the goal has been met (by numbers or defined qualities).
- A**MBITIOUS Challenging enough that achievement would mean significant progress—a “stretch” for the organization.
- R**EALISTIC Not so challenging as to indicate lack of thought about resources, capacity, or execution; possible to track and worth the time and energy to do so.
- T**IME-BOUND Includes a clear deadline.
- I**NCLUSIVE Brings traditionally marginalized people—particularly those most impacted—into processes, activities, and decision/policy-making in a way that shares power.
- E**QUITABLE Seeks to address systemic injustice, inequity, or oppression.

By incorporating equity and inclusion into your SMART goals, you can make sure your organization’s commitment to racial equity and inclusion is anchored by tangible and actionable steps. Here’s an example of a SMART goal turned SMARTIE:

**SMART**

**SMARTIE**



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Build a volunteer team of 100 door-to-door canvassers by May...

...with at least 10 people of color recruited as volunteer leaders first, so that they can help shape the way we run the canvasses.

**Please note:** there's a fine line between inclusion and tokenism. What's the difference? Power. In most cases, it's not enough to tack on "...and x number of volunteers/new hires/spokespeople should be people of color" unless the people you're trying to include will be able to influence the work in a meaningful way. SMARTIE goals are about including marginalized communities in a way that shares power, shrinks disparities, and leads to more equitable outcomes.

Learn more about [How to Embed Inclusion and Equity in Your Goals](#) and visit our [Goals Bank](#) for inspiration. Ready to get started? Use our SMARTIE goals **practice sheet** below.

## Start Writing Your SMARTIE Goals

Use this template to write a goal for yourself or a team member.

**Time Bound:** My goals between [ ] (start date) and [ ] (end date) are to achieve this **Strategic** and **Ambitious** outcome:

I will know success when I see it using these **Measurable** standards:

- 
- 

A **Realistic** plan to achieve this goal includes these tactics/activities (consider time, resources, capacity):

	By [ ] (date)
--	---------------

	By [ ] (date)
--	---------------



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By  (date)

Thinking about **Equity and Inclusion**: Can you imagine there being any unintentional *disparate impact* along lines of power and identity? How might inequity or exclusion show up? For whom?

How could you *change the goal* to either mitigate that disparate impact or make **Equity and Inclusion** more explicit?



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