



ORGANIZATIONAL FRAMEWORK FOR EQUITY



Seattle Repertory Theatre

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Bookda focuses on promoting equity and social justice through providing coaching and consulting to nonprofit, for profit, and philanthropic organizations and leaders.

Bookda has over 30 years of experience as an executive and policy advocate working alongside organizations committed to fighting inequities and injustice, using equity, justice, and inclusion lenses. She is well-versed in using anti-oppression and feminist lenses in strategic planning and organizational development. Bookda has a reputation for uniting diverse stakeholders to co-create and achieve common goals and sustainable partnerships and has extensive experience leading organizations with a broad and diverse base of donor support.

Prior to working as a consultant, Bookda was the Executive Director of four nonprofit and philanthropic organizations for a total of 27 years. Bookda was the Founding Executive Director of Global Washington, which is a one-of-a-kind membership organization in Washington State that convenes organizations and leaders in the global development community. Prior to starting Global Washington, Bookda was the Executive Director of Social Justice Fund and was responsible for changing the model and course of the foundation to embrace social justice philanthropy model by attracting cross-race and cross-class donor base to the foundation to address the root causes of social, economic, and environmental inequities through strategic grant making efforts.

Equity Statement

Seattle Repertory Theatre is committed to producing the highest quality programming and we believe that our ability to contribute to excellence in the arts depends on building a community whose members come from diverse cultures, backgrounds, and life experiences.

We choose to support programs which engage the complexities of a range of experiences and provide all community members with a respectful and sometimes challenging space in which to explore many divergent opinions and ideas. We believe that authentic theatre is not a transaction; rather it is a relationship with the community served by the theatre.

We are part of a growing movement in theatre to ensure that those who have been excluded historically are at the decision-making table and reflected in our programming. We aim to lift up the voices and visions of members of diverse racial and ethnic groups, women, LGBTQI people, immigrants and refugees, people with disabilities and others.

Seattle Repertory Theatre invites community members of all backgrounds and identities to join us in conversation around these issues. We actively seek out feedback, thoughtful dialogue, and ideas that will move this work forward.

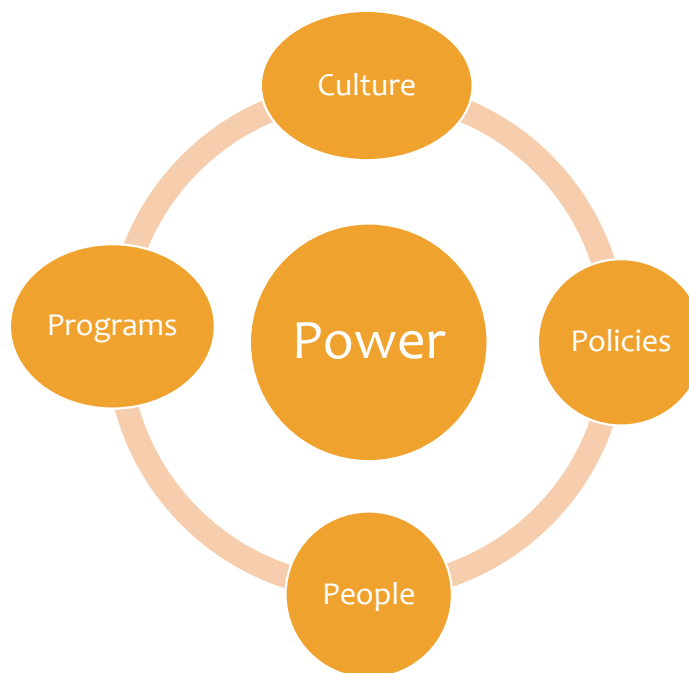
Theory of Change

Organizations that effectively lead with and integrate racial equity do this by connecting equity and inclusion to the mission and values of the organization and having leadership commitment and support for this work.

As a result, rather than considering diversity and inclusion to be one more thing that must be done, it becomes a critical part of the everyday work. Equity and inclusion become woven into everything you do and not perceived as an additional responsibility. Effective and sustainable change within an organization depends on this integration.

This report is centered around five elements: Policies, Programs, People, Power, and Culture (borrowed from Western States Center model). Power sits at the center of this model as the key in setting the tone for the positive development of culture, people, programs, and policies.

To continue the organizational transformation that is already unfolding, SRT would build a timeline and action steps for tackling the recommendations in each of these areas.



Executive Summary

Top priorities from this plan are:

Trainings and on-going conversations:

- SRT commits to two annual trainings for all staff and volunteers; an annual retreat for the Trustees and top donors; monthly caucuses for people of color and white allies; and a monthly lunch hosted by the Equity Team, with speakers from Black Lives Matter, Sanctuary Movement for immigrants, issues related to a play you are producing, or watching a film to discuss as a group. This monthly gathering is an educational space that helps advance the conversations. Trainings are mandatory and everything else is optional.
- Racial equity training becomes mandatory. A total of 20 hours of training required from all staff and 10 hours of training required from all Trustees. These training hours can include attending talks, readings, and other activities centered on race and racism.

Integration:

- Diversity and inclusion are integral to the organizational mission and values. Document organizational values regarding diversity and inclusion using clear, unambiguous language that will not lend itself to conflicting interpretations.
- Weave the top priorities from this plan into the strategic plan for the organization. Equity and inclusion must be centered as one of your strategic goals, and not marginalized or framed as “extra.”
- Appoint a cross-departmental task force that would focus on organizational policies: review all HR practices, update the process of hiring, interviewing, training, welcoming, and orientating employees to equity work. Move towards a commitment that the Rep no longer hires people without an equity lens.
- Develop and activate a plan for integrating social justice framework into season planning and expand the number of people involved in selections and reading.
- Data collection is critical: begin to collect data about staff, interns, Trustees, audience, donors, plays, and artists.
- Community collaborations are essential for organizations in the progression towards racial justice. Through community collaboration, cultural values, needs, strengths, and history are shared and potential impacts on programming are explored
- Trustee issues: Review the process of Trustee Recruitment, the Advisory Council, the annual pledge signed by Trustees, and revise and draft a give/get pledge

Equity Narrative:

- Develop story behind equity work for the public.
- Develop and share internal talking points that outline the organization’s work on racial justice for all staff and leadership.

Implementation of this Equity Plan

Step 1: Leadership commitment and support is essential! Get buy-in and support from the most influential supporters of the organization: Trustees, top donors, other stakeholders. Pull together a group of people to review this plan, give feedback, and help identify the next steps (strategic planning group, equity team).

Step 2: Diversity and inclusion are integral to the organizational mission and values. Document organizational values regarding diversity and inclusion, using clear, unambiguous language that will not lend itself to conflicting interpretations.

Step 3: Decide which of the recommendations from this plan you will commit to in 2017.

Step 4: Weave the top priorities from this plan into the strategic plan for the organization. Equity and inclusion must be **centered** as one of your strategic goals, and not marginalized or framed as “extra.”

Step 5: Because equity and inclusion will be centered as a strategic goal, the people accountable for implementing action toward achieving strategic goals should fully integrate equity goals in planning and implementation.

Step 6: Define clear objectives and set timelines for the goals in the plan.

Step 7: Decide on the budget for this work and prioritize finding grant funding to support the community outreach.

Step 8: Create and revise the policies, systems, and structures from this plan that you identify as priorities.

Step 9: Prepare to engage in ongoing reflection, adjustment, annual review of the plan, setting new goals, evaluation of prior goals, and adaptation of the plan.

1. Power

Leadership commitment and support to move this work forward is essential. Currently, the management team is all white and highly homogenous. Of 46 Trustees, three are people of color. While other forms of diversity surely exist among the Trustees, there must be intentional movement toward greater leadership diversity. A genuine commitment to equity requires meaningful action toward more diversity among those who hold decision-making power at SRT. Training and on-going discussions about equity for the organization's leadership are crucial. Bias can be present anytime a group of leaders gather to discuss talent and make decisions about the organization's future, recruiting Trustees, and promotion of staff. The audiences, community, future staff, and Trustees need to know why the organization is making this investment. They need to hear in specific terms why a systematic commitment to equity and inclusion is vital to SRT leadership, to the strategic direction of the organization, and to fulfilling SRT's mission and serving the community. SRT is isolated and secluded from communities of color. Trustees and management don't have relationships with people who can help recruit the amazingly talented people of color in Seattle. If people of color perceive your approach as tokenism, it becomes hard to find people who want to join the staff and Board.

Recruit Trustees and senior management who have experience with these issues and can assist in governing and managing to advance the culture of inclusion and equity. Key stakeholders from the organization need to visibly sponsor the effort and be clear that this is a fundamental shift—not simply diversity trainings. You are committing to a long-term sustained commitment in which all Trustees, employees, volunteers, and donors have a role and a voice, regardless of position.

Suggested Actions and Plan:

- Two trainings per year to be scheduled for Trustees, followed by discussions about what they anticipate as the impact of equity and inclusion in the organization.
- Each Trustee signs a pledge and commitment with actionable steps to work towards personal and organizational equity.
- Hold three roundtables in 2017 and 2018 with Trustees and key stakeholders and leaders from communities of color in Seattle. The purpose of these meetings is to build stronger and ongoing relationships at the leadership level with communities of color and to identify strong candidates for the Board.
- Trustee Recruitment—From the above roundtables, develop some action plan for the Trustee Recruitment Committee on what would it take for SRT to attract POCs to the organization, develop a list of potential candidates, and begin to meet with them.
- Develop 2-3 questions to be incorporated in every interview (staff, interns, Trustees, artists, consultants, etc.) to assess experience and commitment to equity. This commitment is strongly weighted in evaluating and selecting future leaders for the organization. Begin by drafting questions that can be asked in all interviews.
- Given the governing body's role in approving organizational budgets, it must ensure that budgeting reflects cultural responsiveness and racial equity, and that it ensures sufficient resources exist to implement the equity plan.
- Develop and share internal talking points that outline the organization's work on racial justice for all staff and leadership.
- Look for the most influential people in the organization. Even if they are the biggest naysayers, educate and influence them to be spokespeople.
- Advisory Council—The decision to invite some people onto the Advisory Council and some onto the Trustee board allows potential bias that can work against equity and inclusion goals. Consider

a restructuring process and invite EVERYONE to join the Advisory Council for one year and then, based on their performance, invite them to join the Board.

- Give and Get commitment—Currently Trustee’s pledge to give \$5K and to work on fundraising an unspecified additional amount. Changing this to a combined GIVE AND GET pledge of \$5K will open doors for new Trustees. You can ask Trustees to think of this as the minimum level so that people with the capacity to raise more are encouraged to think bigger.

Action	Budgeting implications	Level of Effort/ Difficulty: low, med, high	Estimated time requirement of staff	Estimated time requirement of Board	Impact: low, med, high	Timing: 2017, FY18, FY19+, on-going	Bookda’s recommendation: Do immediately, 2017, Future
Trainings	4K/yr.	Low	5 hrs./yr.	10-15 hrs./yr. to attend	High	On-going	Annually
Trustee Pledge	None	Low	10-15 hrs. of Jeff’s time	Low	High	2017 and annually	Do immediately
Trustee Recruitment	None	Medium	Low	High-committee work	High	2018	Future
Roundtables	None	Medium	10-15 hrs.	10-15 hrs.	High	2017 and 2018	Future
Trustee and staff interview questions	None	Low	2 hrs.	2 hrs. committee work	High	On-going	Do immediately
Talking points and story of equity	1-2K	Low	10-20 hrs. of staff time	1-2 hrs. to review	Medium	Now!	Do immediately
Engage influentials	None	Low	Low	Low	High	On-going	2018 and beyond
Revise Advisory Council role	None	Medium	Low	3-5 hrs. committee work	Low	2017 discussions	2018
Revise Give and get pledge	None	Low	2-3 hrs.	2-3 hrs.-committee work	High	On-going	Do immediately

2. Policies

The goals of racial equity policies are threefold: to ensure that progress is not lost when leadership changes; to make a clear and direct commitment of intention to advance racial equity; and to establish lines of accountability for effective policy implementation.

Begin the process of adopting new policies by appointing a cross-departmental task force that would focus on organizational policies, hiring, interviewing, training, welcoming, orientation to equity work.

Training

- Continue to offer two all-staff and Trustee trainings per year. This will deepen learning and provide an organization-wide shared language and framework. Calendar these trainings now for 2017.
- Develop an orientation for new staff and Trustees that includes the history and value of this work.
- Racial equity training becomes mandatory. A total of 10 hours of training required from all staff and 10 hours of training required from all Trustees. These training hours can include attending talks, readings, and other activities centered on race and racism.
- Expand and enrich the base of the dialogue by holding monthly caucuses for white and POC staff. The goal is to increase organizational capacity so that these caucuses can be facilitated and run by staff.
- A monthly equity luncheon and discussion gathering. Films, speakers, dialogue about community issues occur in cross- race setting.

Workforce & Audience Composition

- Data collection and analysis:
 - Create a policy and implement a procedure on collecting race/ethnicity data for your audience, plays, artists, donors, Board, and staff. This is important in setting goals and milestones for the future. You can easily add this feature onto your database and collect this data from all your supporters when they make a gift and buy tickets.
 - Provide racial/ethnic choice categories that reflect the particular groups in your community and greater Seattle as a whole. Disaggregate your data as much as possible when collecting information: American Indian/Alaskan Native; Black, African, and African American; Asian; Pacific Islander; Hispanic/Latino; Middle Eastern.
 - Make it easy for individuals to self-identify race and ethnicity, select “other,” and select multiple races and ethnicities. People should have the complete freedom to self-identify. It is important to not push identity, labels or definitions onto others. Supervisors need some discussion and tools for conversation about this.
 - Once you have some accurate data, set goals for the future

Resource Allocation & Contracting Practices

- Engaging consultants and sub-contractors:
 - Review your contracting practices (and those of other organizations with whom you contract) to find if your organization can do more to engage with minority-owned businesses, women-owned businesses, and emerging small businesses.
 - Develop policies regarding the use of Women and Minority Business Enterprises.
 - Require your vendors and contractors to adhere to the same equity practices and policies by asking to review their policies.

- Integrate equity issues into the work of all consultants hired. Consider hiring from the amazing pool of consultants of color in Seattle who can support all aspects of the organization.

Organizational Climate, Culture & Communications

- Revise mission statement to include clear equity language.
- Support difficult conversations about race between individuals and in groups, in a safe, confidential, private space. Some of this content is included in new personnel policy drafts.

Recruitment & Retention of Staff

- Currently 10% of staff are people of color and 10% of Trustees are people of color. Develop plans for Board & staff recruitment that include benchmarks for where you want to be in 2 years. Collect these benchmarks in working with Trustees and the Management Team and once there has been agreement on these goals, incorporate in the strategic plan and set milestones against the 2-year goal. (Bookda's suggestion: increase by 10% per year).
- Develop simple procedures that help everyone in the organization understand the process of recruitment and allow everyone to follow the same steps. This includes posting jobs widely, asking 1-2 questions about equity of everyone, developing a process to minimize bias during resume review and interviews.
- Interviewing: everyone must be asked one question about their commitment to social justice. Post-interview, the panel should discuss with one another what they heard and their interpretation of the response. SRT can make a commitment to hire only people with a demonstrated commitment and experience with social justice, defining internally in a clear way what constitutes a "demonstrated commitment."
- Help foster a positive and friendly and welcoming environment for new staff and volunteers. Develop orientations, develop a buddy system, introduce people to one another.
- Build community and social opportunities so that staff from different departments can connect more than they currently do. People can tackle difficult conversations and situations better when they have trust and an existing warm relationship.
- Meet and greet parties with the cast of plays and orientation to the equity work.
- Develop simple job aids to help managers think through important talent decisions. Someone with equity expertise should support all managers to help make decisions about promotions and hiring. (Ideally, the new Equity and Inclusion Director or a consultant with this expertise can be used).

Performance Evaluations

- Performance appraisals/evaluations include progress on racial equity and social justice goals for all staff.
- Implement formal and informal complaint procedures for staff regarding race-related complaints.
- Write staff development plans that ensure that POC and all staff gain access to professional development opportunities.

Internship Program

- Outreach and relationship with universities who understand that you are recruiting for students of color and students committed to social justice.
- Screening tool and application process needs to be unified and shared across the organization.
- Orient interns to the organizational commitment to equity.
- Introduce interns to others in the organization and create opportunities for them to take on projects with more than just one team.

- Center equity and social justice in intern job descriptions
- Develop a survey to track data from interns during the application process

Action	Budgeting implications	Level of Effort / Difficulty: low, med, high	Estimated time requirement of staff	Estimated time requirement of Board	Impact: low, med, high	Timing: 2017, FY18, FY19+, on-going	Bookda's recommendation: Do immediately, 2017, future
Trainings	10K/yr.	Low	10-15 hrs./yr.	10-15 hrs./yr.	High	On-going	Annually
Caucuses	None	Low	2 hrs. monthly	Low	High	2017 & annually	In place
Orientations for new people	None	Medium	Low	High--committee work	High	2018	Future
Monthly brown bag	None	Medium	10-15 hrs.	10-15 hrs.	High	2017 & 2018	Future
Engaging consultants and sub-contractors	None	Low	Low	None	Low	2018	2018
Data collection and analysis	None	Low	5-10 hrs.	None	Med	2018	2018
Recruitment & Retention of Staff	2K/yr. advertising	Low	10 hrs. training for all staff	None	High	On-going	Do immediately
Performance evaluation	None	Low	Same as current	None	High	On-going	Do immediately
Internship Programs	None	Low	5-10 hrs.	None	High	On-going	Do immediately

3. People

Staff:

Add a leadership position to move the equity work forward.

Equity and Inclusion Community Director or Community & Equity Engagement Director. A leadership position with time divided between community-based work and time in the organization to oversee the implementation of the equity work. This person would engage with community partners and develop programs that focus and enhance our presence in all Seattle communities. This senior position would call for someone who has a lot of experience being the public face of an organization and comes to SRT with many existing and trusted relationships. This person also needs a lot of equity and social justice organizational experience.

External community work duties include:

- Build trusting, lasting, and rich relationships with communities of color. Go beyond “silo outreach” such as reaching out only to black people for *Raisin in the Sun*, to Vietnamese people for *Vietgone*, and so on. Get genuinely creative in carving out new pathways toward becoming a multicultural community.
- Identify community partners on an ongoing basis. Hold listening sessions in the community about how they can benefit from a partnership with SRT.
- Focus on building lasting audience diversity through community engagement and ongoing partnerships.
- Oversee development and management of public programs including pre- and post-show events, as well as community-based events and discussions that explore the programs and their themes. Facilitated conversations, dinners, and debates allow smaller groups to engage deeply in the programming. This work can be funded by a foundation.
- Create initiatives and ongoing strategies for engagement and audience development that goes beyond marketing the shows SRT produces.
- This position would implement many of our collective ideas around audience development, audience diversification, and implementing public programs that support these efforts.
- Oversee current Ambassador Program and expand the purpose and network

Internal organizational work duties include:

- Coordinate closely with the HR Director.
- Oversee the implementation of all HR policies suggested in the equity plan.
- Support the process of equity implementation in the organization and oversee progress toward goals.
- Support and coach managers to incorporate equity into their supervisory duties.
- Oversee the affinity groups and support the affinity group leaders.
- Oversee and coordinate trainings for Board and staff.
- Coordinate referrals for staff and board to receive additional community-based trainings and support.

Donors:

- Host a number of small group conversations with top donors and Trustees to share the story of this journey and to get their buy-in, support, and increased commitment. Your top donors will begin to see this as a critical process for the organization that is committing to improve outcomes and impact.

Artists:

- Forge relationships with artists who can help move this process forward. When visiting artists arrive at SRT, provide an orientation about this work and communicate the organizational commitment and the clear expectations around partnering for a social justice environment.

Artists:

- Continue to diversify pool of directors, playwrights, actors, and designers.

Trustees:

- The role of the Trustees in moving the organization forward is critical. They need to clearly understand why the organization is moving in this direction and see the positive outcomes and impact for all. For example, small group dinners can be organized to support these conversations.

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Hire a position	High	High			High	2017	Do immediately
Engage donors	None	Med	Med—during ongoing donor visits	High—systematic engagement of donors	Med	2018	Future
Engaging all artists	None	Med	Low	High-systematic engagement of donors	High	2018	On going
Engaging all Trustees	None	Med	Low	High-systematic engagement of Trustees	High	2018	Do immediately

4. Programs

Audience Voice & Influence

- Collect data on audience satisfaction with your organization regarding racial equity. There are tools you can use to survey the audience when they are in the theatre, including a few simple questions on their mobile devices. Easy-to-use platforms for mobile phones are available for audience use while in the theatre.

Community Outreach

- Community collaborations are essential for organizations in the progression towards racial justice. Through community collaboration, cultural values, needs, strengths and history are shared and potential impacts on programming are explored. Collaborations that are true partnerships require the organization to value and lift up community voice in assessment, planning, program delivery and evaluation. This means that relationships are developed early, are continuously maintained, and don't exist for the sake of only one program. These on-going conversations educate and inform your entire season planning. Change the current approach of connecting with communities of color only when the play has been introduced and publicized. Build relationships early, keep them, make them last, and build more. Many mainstream organizations tokenize people of color. Authentic, mutual relationships sustained over time are the opposite of tokenization: they are what real community collaboration looks like. They call for a new level of conscious engagement, and that takes work. These collaborations can bring deep joy, creativity, fresh energy, and vital resources. Ambassadors at SRT can be a significant key to this change in approach. Work with them actively through this process.
- Develop and activate a plan for integrating social justice framework into season planning
- Create a Listening Circle to hear and collect community input through focus groups, listening sessions, and one on one meetings. Set a goal to conduct 20 one-on-one meetings with POC leaders in 2017. Develop an understanding of who's who in communities where you don't have strong connections. Ask Ambassadors to take a lead on this and to collect the data and give to the leadership. Ask Trustees to attend these meetings.
- Develop a framework for Ambassadors Council to support and participate in this plan.
- Does your organization allocate resources for engagement and outreach in communities of color? Add resources in the budget in 2017 to reimburse the Ambassadors with an honorarium to conduct these meetings. Also ask the Ambassadors to identify possible staff and Trustees from these meetings.
- Hire consultants to help connect you to communities of color and to bridge the relationships.
- Develop a process of incorporating suggestions and recommendations from the community into the organization.
- Develop performance-based outcomes that hold the organization and its representatives accountable to the community.
- Show up as an ally at events and activities important to organizations and leaders of color.

Building the Equity Narrative and Revising Marketing Materials

- Make a public commitment to racial equity. Link equity and social justice with the commitment you have to high quality programming.
- Build the narrative of why you are doing this work, lessons learned, the process you are committing to, and begin to share this publicly.
- Create visible signs of your organization's commitment to racial equity in your primary physical location. I envision a board/poster in the lobby that shares the story, a half page statement in the

programs, photos and images, and presence at events in the community about the intersection of arts and equity.

- Assess all organizational materials through a racial justice lens. Review invitations and both internal and external communication materials to scan for language that might be insensitive, erasing or devaluing a group (ideally, the new Equity and Inclusion Director or a consultant with this expertise can be used).
- The enclosed Equity Statement should be edited, finalized, and shared in all your materials: website; every program; and, ideally, a small exhibit of a few posters in the lobby telling the story of the organizational commitment. Develop strong talking points and story lines that explain why racial justice is a central organizational value. Share these talking points with staff, Trustees, and volunteers regarding the organization’s work for racial justice and get feedback.
- Assess organizational materials to evaluate how POC’s are portrayed in publications. Continue this assessment as an on-going process.
- Communications should consistently name race, racism, and racial equity in current and historical context.

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Audience feedback	2-3K	Low	3-5 hrs.	None	Med	2018	Future
Season planning	None	High	??	??	High	2018	Do immediately
Engage community leaders	None	Med	40-60 hrs. annually	20-30 hrs. annually	High	On-going	Do immediately
Budget for outreach for plays and on-going	2-3K per play	Low	Low	None	High	On-going	Do immediately
Ambassadors Council	None	Low	Low	None	High	On-going	Do immediately
Building the equity narrative and revising marketing materials	2-5K	Low	20-40 hrs.	10-20 hrs.	High	2017	Do immediately

5. Culture

Shifting organizational culture is challenging and takes time. While culture is a challenging element to modify, it can be directed by a set of policies, vision, and practices that promote inclusion and acceptance of change. I interviewed a lot of people to gather their input and observed a lot of interest in the equity and inclusion work moving forward. At the same time, some staff expressed frustration that processes beyond training are not further advanced. Many staff expressed doubts that this commitment to equity would have a meaningful, lasting impact. In this climate, it is important to set clear goals and milestones and report frequently and fully on activities and progress toward these goals. There also seems to be some lack of trust in some organizational processes.

It is also important to note that many of the staff framed equity and inclusion in terms of a warm and welcoming environment. Staff expressed their desire to be heard, seen, valued, and deeply engaged.

- SRT commits to: two annual trainings for all staff and volunteers; an annual retreat for Trustees and top donors; monthly caucuses for people of color and white allies; and a monthly lunch hosted by the Equity Team with speakers (some examples can include: Black Lives Matter, Sanctuary Movement for immigrants, and other groups, exploring changes in Seattle, issues related to a play you are producing, or watching a film to discuss as a group). This monthly gathering is a fun and educational space that helps advance the conversations. Trainings are mandatory and everything else is optional.
- Educate staff in a positive way that supports their success and does not frame advancing equity and inclusion as focused on punishment or wrongdoing.
- Fundraise for this work specifically for the first 2-3 years to assure continuity: build a package of the essentials of equity (a staff salary, community conversations with donors, leaders, etc.), hiring outreach specialists that connect you with communities of color on each play, a stipend for Ambassadors to support this work, and pitch this to some local foundations.
- Develop a series of community dinners and conversations hosted by your top donors, Ambassadors, and Trustees to talk about the programs, as well as the equity work.
- New staff, Trustees, volunteers: A monthly (or as needed) orientation that helps bring on new people and helps them understand the commitment and history. Orient all actors and seasonal staff as they arrive for programs.

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New team member orientation	None	Low	3-5 hrs.	3-5 hrs.per cohort	Medium	On-going	2018
Fundraise for this work	None	High	??	??	High		Begin process now
Board leadership dinners	None	Medium	10-15 hrs.	3 dinners in 2018?	Medium	Future	2018