

Roadmap for Addressing Your Organizational Legacy

THINGS YOU CAN CONTROL

PRE-WORK

Intentional Awareness

Does your organization accurately understand your legacy? What has been done thus far and how effective was it? Are these conversations happening in silos?

Consider:

- A reputation study or facilitated conversation

Caution:

- Focusing on history can lead to blaming an outside issue rather than doing the important work yourself

Personal Preparation

As you, as a leader and/or leadership team, personally prepared to embark on this journey with authenticity?

Consider:

- What organizations or individuals in your network can counsel you?

Caution:

- Empty commitments and lip service will not serve you when the road gets rocky

Current State

Have you already made strategic changes in response to the legacy (i.e. shifts in grant making or program development)?

Necessary Support

Do you have the in-house expertise to manage this conversation and its outcomes, or do you need to engage external experts?

ACKNOWLEDGE

Identify Boundaries of What Reconciliation and Repair Can Look Like

Consider:

- Should you prioritize addressing the past or building a more inclusive future? What is within your sphere of influence?

Internal Staff Conversations



Conversations with Other Key Internal Stakeholders

Consider:

- Timing, in-person vs. virtual for awareness of power dynamics, signs of conflict

Caution:

- What pre-conversations do you need to have? How do you set boundaries so people don't feel attacked? What stereotypes are in place?

Information Gathering with Key Stakeholders



Cooling-off Period

- Research
- Process
- Develop framework for public stance



RECONCILE

- Communicate with key stakeholders
- Identify triggers for proactive outreach to peers, media, and the public



“Focus Group” Messaging with Key Stakeholders via Individual Conversations

REPAIR

Enacting Changes

- Adjusting Strategy
- Enacting New Programs
- Expanding Definitions



Developing Frameworks for Continued Conversations

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THINGS YOU **CAN'T** CONTROL



Principles

- Be transparent about your journey
- Be intentional in the face of change
- Expect the unexpected

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External/internal calls for change

- Can happen at any time and will most likely be at the least convenient time
- Be transparent about your journey:
 - Prioritize communicating with key audiences, and remember your staff and trustees are one of them. Make sure internal stakeholders don't hear about your response in the media first
 - Lean into the process you're undertaking as the basis for content for any reactive statements (internal or external)
- Be intentional in the face of change:
 - Do you need to course-correct? Or do these calls further validate the path you are on?



Organizational changes

- Examples: new staff or new trustees, new regulations, new funding sources that require shifts in strategy or operations that bring you closer to or further away from reconciling your legacy
- Be transparent about your journey:
 - During the hiring or selection process for new staff/trustees
 - With internal stakeholders if new regulations or funding sources necessitate changes in operations
- Be intentional in the face of change:
 - Provide resources or frameworks during the onboarding process to help new members explore their personal stance on issues related to the legacy
 - Outline updated processes if organizational changes force shifts in your legacy journey



Societal changes

- Examples: new national or international movements
- Be transparent about your journey:
 - Take the opportunity to define the boundaries of your engagement. How much of this movement can you credibly address or influence?
- Be intentional in the face of change:
 - Do you need to course-correct? Or do the principles of this societal change further validate the path you are on?