Culturally Responsive Strategic Planning for Black, Indigenous, and Other People of Color-Led and Serving Community-Based Organizations©

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POLICY BRIEF

Executive Summary

Community-Based Organizations (CBOs) are critical institutions in any community's organizational landscape. CBOs administer government financed goods and social services to meet the needs of the community. They also play important roles in building community capacity and delivering critical services to individuals, families, and community members. CBOs led by Black, Indigenous and Other People of Color (BIPOC) often have additional duties as first responders. They address social and health crises as well as ongoing inequities in communities that are experiencing marginalization and disinvestment.

While CBOs are crucial for the longevity of communities in the US, they often lack the time, resources, and staffing to successfully carry out organizational development or capacity building activities needed to enhance efficiency (operational and program) and effectiveness. These activities include: program planning and implementation; goal setting, professional and talent development; and evaluation. Despite their unique and vital contribution to the CBO landscape, BIPOC-led and serving CBOs typically receive less funding and have fewer opportunities for organizational development assistance than predominantly or historically white CBOs.

Through culturally grounded organizational development and empowerment, BIPOC-led and serving CBOs can become more efficient and effective. In the CBO space, enhancing operational functioning and financial stability for BIPOC CBOs would improve the overall impact of these organizations, while supporting their capacity to address social and health equity crises, including systematic racism in the social sector. To achieve this end, BIPOC CBOs must be developed and properly funded in ways that allow them to keep their own organizational culture and the cultural norms of the community they serve.

Background

Black, Indigenous and Other People of Color (BIPOC) serving and led community-based organizations (CBOs) often serve as first responders in addressing social and health crises, anti-racism initiatives, and addressing ongoing inequities. However these organizations typically receive less funding and have fewer opportunities for organizational development assistance (Baboolall et al., 2022; Taylor, 2021; Terrana, 2017). More specifically, despite the importance of BIPOC CBOs in the fight against social and health inequities, these organizations are often subject to the same patterns of geographical segregation as the communities they serve. BIPOC CBOs also tend to be excluded from social and financial networks that can increase their capacity to serve their communities. BIPOC-led or serving CBOs are less likely to be high-capacity organizations in terms of funding, staffing, and socio-political network size.

These factors contribute to the exclusion of the interests of BIPOC communities in favor of the interests of high-capacity and typically white-led organizations (Danley and Blesset, 2022). An illustration of this phenomena

is the Jamaa birthing center (a Black lead/serving CBO) and Mercy Health System (a large white-led healthcare system) partnership. After learning culturally responsive pre-natal care from Jamaa, [Mercy](#) intended to open a competing facility neighboring Jamaa as opposed to supporting Jamaa's mission. However, the efforts were stopped by Jamaa and other community activists.

Building capacity in BIPOC CBOs requires dismantling of systemic racism that underlies organizational segregation. Furthermore, BIPOC CBOs must be developed and properly funded to address social and health equity issues in a manner that allows these CBOs to keep their organizational culture and the cultural expectations and norms of the community they serve. For example, culturally grounded programming starts with culturally grounded business strategy that embraces the shared values and beliefs of the CBO and their clients. Successful organizations approach decision-making using activities, measures, and tools that are aligned with their organizational identity, culture, and strategy. Providing culturally responsive organizational development support to BIPOC-led and serving CBOs helps support these organizations, which directly provide services to communities affected by systematic racism.

Methodology and Data Collection

To illustrate the need and opportunity for culturally responsive strategic planning for BIPOC CBOs, this paper presents a case study that focuses on strategic planning activities related to establishing organizational vision, the first step of a Hoshin planning process. Hoshin planning is an organization-wide process that helps connect your organization's vision or 'North Star' with day-to-day activities (Zairi, 2006). The Hoshin planning process involves Identifying future goals (your organizations ideal future state); defining goals; identifying steps to take to execute goals; coordinate teams in your organization to execute the goals; implement and monitor regularly; and assess annually.

This initial step was chosen as the area of focus because culturally grounding a strategic planning process must start from the outset. Understanding how organizational, client, and community cultures influence an organization's vision can help an organization develop goals and objectives that honor these cultures and create meaningful collaborations over time. At the outset, the strategic planning process was designed to be participatory and representative of all BIPOC CBO departments and levels of staff.

Two key factors motivated the decision to design a participatory and inclusive planning process. First, employee participation in organizational decision-making increases engagement, buy-in, performance and sustainability of strategies. In this case, we focus on performance in terms of executing the strategic plan (Jha & Kumar, 2016). Second, the BIPOC CBO in this study seeks to help their clients ameliorate intergenerational poverty. The majority of the staff are from the CBO service area and represent historically marginalized communities that have traditionally been excluded from societal power structures and decision-making (Reid et al., 2022). As such, implementing organizational development processes that are exclusionary in nature would be the antithesis of the CBO's mission. The study merges a Black-cultural thinking tool called the PEN3 Model

(Airhihenbuwa 1990) with a traditional Strengthens, Weaknesses, Opportunities, and Threat (SWOT) analysis. The new, culturally grounded SWOT analysis, entitled PEN3-SWOT, aims to facilitate the development of more sustainable and strategic CBO goals by deliberately incorporating aspects of organizational, service area, and employee culture that, if ignored, may undercut goals and/or miss opportunities for enhancement.

The three PEN3-SWOT prompts were:

1. Please describe how CBO's organizational cultural identity is a strength, weakness, opportunity, and threat;

2. Please describe how your own cultural identity contributes to CBO's organizational culture and mission;

3. Please describe how CBO's clients contribute to your organizational culture and mission.

Results

Findings from the case study show that when querying the CBO about the role of organizational, community, and client culture, additional themes emerge related to CBO identity and relationships with stakeholders. For example, the PEN3-SWOT analysis facilitated reflection on how an organization grounded in Black culture could share their knowledge with other organizations that are seeking assistance with improving their diversity, equity, and inclusion (DEI) practice. DEI initiatives are often difficult to implement and measure, and they require 'skin in the game' to be successful (Foley 2020;Worley 2022). The CBO can become a valuable DEI learning partner to larger organizations that may offer support or exposure to funding new sources.

In addition, the PEN3-SWOT facilitated discourse on the CBO's identity as a Black organization and the potential barriers to funding, partnerships, and client satisfaction that are key elements of organizational viability. Organizations serving Black communities are already at a disadvantage when procuring government funding (Garrow, 2012). Strategizing how to partner with diverse stakeholders and present the CBO as an organization to invest in may increase funding.

Lastly, we note that strategic planning is not always financially accessible for non-profit CBOs due to the cost of facilitation. In addition, quantifying metrics and performance are challenging when the primary mission of the organization is to influence social change and deliver social services. The CBO for this project was provided financial assistance from a national organization that supports CBOs for their strategic planning activities. The CBO received financial support in 2018 and pro bono assistance in 2021. These are critical considerations when contemplating strategic planning especially for low resourced organizations.

Conclusion

Organizational development of BIPOC-led and serving CBOs is as a critical component in addressing social and health equity crises, including systematic racism in the social sector. BIPOC CBOs are often the first responders

and foot-soldiers in the battle to ameliorate systemic racism and help communities recover from the harmful and damaging effects of discrimination and institutional violence. Some major goals of this work include assuring that BIPOC CBOs receive the resources they need, are recognized for the power and trust they hold in the community, receive the support from industry and government, are not excluded from the financial and information stream, and are not 'outcompeted' by larger organizations.

Community and organizational developers must be keenly aware of the landscape they are building and how the partnerships they create and resources they accept may actually contribute to or reproduce systemic racism. Furthermore, larger organizations and entities that want to assist in undoing the effects of systemic racism on the community level should understand policy resistance, negative feedback, and how short-term solutions may lead to either positive growth or continued disenfranchisement in the community.

To address some of these issues, BIPOC CBOs must be developed and properly funded to address social and health equity issues in a manner that allows these CBOs to keep their organizational culture and the cultural expectations and norms of the community they serve.

Acknowledgements

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Recommended Websites, Infographics, and Links

1. Association of Black Foundation Executives

2. Movement Strategy Center: "Organization Development for Social Change: An Integrated Approach to Community Transformation"

3. Community Foundation of Northeast Iowa: BIPOC Led Nonprofit Directory

4. The BIPOC Project

5. Urban Institute: Place-Based Initiatives

6. Federal Reserve Bank of Atlanta: "The Role of Place-Based Initiatives in Community Development"

7. Joint Economic Committee Democrats: "The Economic Status of Black American: National and State Level Data, 2022 Edition"

8. The Center for American Progress

9. Community Commons: "BIPOC Health Equity Library"

10. Nonprofit Quarterly: "What it Looks Like to Build a Pro-Black Organization"