

Lake / Sumter AAUW  
Diversity & Inclusion Committee  
Report to the Board of Directors  
May 1, 2018

**Background**

At its February 2018 meeting, the Lake / Sumter AAUW Board of Directors created an ad hoc Diversity and Inclusion Committee and charged it to develop a diversity and inclusion plan for the branch. The initial committee consisted of Linda Carpenter (chair), Jacquie Latzer, Bonnie Marcoccia, Kathy Mason, Diane Reichert, Laurel Rowen, and Ginger Ryan. Subsequently, Diane Starr, Ellen Thompson, and Dorothy Dobbs joined the committee.

The committee met eight times between late February and early May. We followed a process AAUW National suggests for developing plans to strengthen branch diversity and inclusiveness. The process includes assessing the branch’s current stage, compared to the stages shown in Figure 1.

Figure 1  
Organizational Inclusiveness Stages \*

Stage 1	Stage 2	Stage 3	Stage 4
<b>Closed/Homogeneous</b>	<b>Neutral/Individualistic</b>	<b>Welcoming/Assimilative</b>	<b>Seeking/Inclusive</b>
People get into the established culture mostly by being groomed and invited. Like-minded people of similar backgrounds . . . are often chosen . . . because they are a comfortable “fit.”	The route into the established culture is open but not well-marked; individuals have to figure out for themselves how the established culture works and how to fit in.	Newcomers are welcomed, and current insiders readily help them learn the ropes, but fitting in with the established culture is key.	Established members actively recruit newcomers and value diversity. They are willing to change themselves and the culture to make room for new people and diverse perspectives, ideas, and ways of working together.

\* Adapted from AAUW Diversity Tool Kit (<https://www.aauw.org/resource/diversity-and-inclusion-tool-kit/>)

**Assessment Results**

The assessment process focused on six categories of branch function: recruitment of members, retention of members, programming, communication, leadership development and succession, decision making and planning. The six categories of branch function, and our assessment of Lake / Sumter’s progress, are as follows:

**Recruitment: Stage 3/2**

Our branch welcomes newcomers (3) but they have to figure out for themselves how the established culture works and how to fit in (2).

**Retention: Stage 3/2**

Our branch uses virtually every strategy recommended by National to welcome people to our branch (3). Although the route into the established culture is open, it is not well-marked (2).

**Programming: Stage 2/3+**

Predominantly we attract members through our programs (2), although there have been programs (such as Gene Klein's talk about the Holocaust and our April 2018 meeting about mental health) that drew numerous nonmembers (3). The branch received some free advertising for Gene's talk from an article in the *Daily Sun* about the Holocaust; it mentioned his upcoming talk to our branch although the article wasn't about AAUW and we didn't request that the newspaper print it. In contrast, most of the visitors for the mental health panel learned of the program through friends who are branch members (3).

We noted that the branch intends to plan more programs to be mission-driven, which is good for at least two reasons. First, our members will gain a broader knowledge of AAUW's mission, vision, goals, as well as a better sense of just why we exist, which should lead to greater retention of members. Second, mission-driven topics should be of interest to nonmembers as well, which could lead to greater recruitment. However, getting the word out is a challenge because of restrictions on free advertising and costs associated with paid notices.

All our meetings are held in locations that comply with the Americans with Disabilities Act, so they are accessible in that regard. Our general meetings are held on the second Saturday monthly during the program year. This conflicts with meetings of other clubs that may be good sources of members for our branch. We noted that the branch has resolved this scheduling issue as meetings will be held on the third Saturday monthly beginning in September 2018.

**Communication: Stage 2/3**

We communicate with our members face-to-face and by several electronic means, but we have no real way of determining who pays attention to electronic communications. Responses to requests for participation are most effective when requests are made face-to-face (2), although opportunities to participate are included in all communications (3).

A bigger challenge, however, is communicating about our branch and our mission and vision to nonmembers (2). As mentioned previously, issues surrounding advertising pose the greatest challenge to getting information to the general public.

**Leadership Development / Succession: Stage 1/2**

People join the established culture mostly by being invited (1). Leaders are chosen if they are a comfortable "fit" (1). The route into the established culture is open but not clearly marked (2).

The branch does not have an effective means of recruiting leaders and has no process for developing them. More often leaders are chosen because they say "yes" to a request to serve.

### **Decision-Making / Planning: Stage 1/2**

The Board of Directors conducts decision-making and planning; they are thus closed processes and are not transparent (1). Members who do not sit on the Board may attend Board meetings, but they are not permitted to participate in discussion, a fact that they may or may not know. The process of developing the agenda allows for contributions from the membership, another fact that they may or may not know. Both situations lead to a de facto closed process (1) that is not transparent (1). Even new Board members, who are welcomed warmly, need to figure out for themselves how the culture works and how to fit in (2).

### **Interpretation**

This assessment yielded information that applied to diversity and inclusion as well as information that seemed more applicable to general branch operations. We have shared information relevant to general branch operations with the co-Presidents and do not address those issues in our plan.

Results of the assessment suggest that the branch needs a permanent Diversity Committee. Accordingly, we recommend that the co-Presidents establish a permanent Diversity Committee and appoint a chair. Ideally, the chair will form the committee from members who express an interest in serving on it.

We focused on diversity and inclusiveness. Those two terms are often yoked, with the implication that they are inseparable. But “diversity” and “inclusiveness” refer to different, although related, aspects of our topic. Thus, we designed the proposed plan to address each aspect separately. We present the plan to the Board as a recommended course of action.

## **Diversity and Inclusion Plan**

### **Diversity Plan**

#### **Diversity Policy**

AAUW National’s Diversity Policy is printed in our branch membership directory.

“AAUW values and seeks a diverse membership. There shall be no barriers to full participation in this organization on the basis of sex, gender identity, race, creed, age, sexual orientation, national origin, disability, or class”  
(<https://www.aauw.org/resource/diversity-policy/>, accessed 4/20/18).

We recognized that this policy specifies an array of “diversities” and adopted this broad definition in our discussions. We also offer the following as an enhancement of our branch policy. It is drawn from the Diversity Policy of the MIT Alumni Association.

The Lake Sumter branch of AAUW is committed to a diverse community that stimulates a culture of learning and understanding and enhances a member’s experience. We aspire to create an inclusive and equitable branch that represents, supports, and celebrates diversity of all kinds.

*We recommend that the Board approve the enhancement to the branch Diversity Policy.*

## **Diversity Goals**

- A. **Goal:** Enhance members' awareness of diversity issues

**Objective 1:** Inform members about the branch policy on diversity

**Action 1:** The Diversity Committee Chair or her designee will forward the policy to the Newsletter Editor to be included monthly beginning with the September 2018 issue.

**Objective 2:** Educate members on the topic for each heritage month (such as Black History Month and Women's History Month).

**Action:** For each heritage month, the Diversity Committee Chair or her designee will forward information to the Newsletter Editor who will include it in the newsletters beginning in September 2018 and continuing as needed.

*While not a specific objective, we recommend that the branch continue to support the charge to the Programs Committee for mission-driven programs, which includes diversity issues.*

**Objective 3:** Ask the Diversity Book Club to select at least one book per year from the AAUW ¡Adelante! Book of the Month Club list (see <https://www.aauw.org/resource/adelante-book-of-the-month-club/>.)

**Action:** The Coordinator of the Diversity Book Club will lead the selection and incorporate it into the book list for each year beginning with the 2018-19 program year.

- B. **Goal:** Encourage members to participate in community events that highlight diversity (such as festivals, theater, art, or cultural events).

**Objective 1:** Beginning in September 2018, inform members about selected community events that highlight diversity.

**Action 1:** The Diversity Committee Chair or her designee will submit a list of community events that highlight diversity for publication in the monthly newsletter beginning with the September 2018 issue.

**Action 2:** The Diversity Committee will develop a plan for branch and individual member participation in a community event that highlights diversity once each year starting with January 2019.

C. **Goal:** Forge coalition partnerships for community projects and programs

**Objective 1:** Develop a list (such as African-American Club, Chinese-American Club, Democratic Women's Club, Republican Women's Club, Zonta, Retired Teachers Club, and faith groups outside The Villages) of potential coalition partnerships.

**Action 1:** By August 1, 2018, the Diversity Committee Chair will develop a list of clubs in The Villages and other community groups for use in outreach activities and will present the list to the Board at the August meeting for distribution to relevant committees.

**Action 2:** By October 1, 2018, the Email Distribution Chair will create an email distribution list or lists for use in outreach activities.

**Objective 2:** Use the branch Speaker's Bureau to reach out to diverse groups in the Lake/Sumter area

**Action 1:** By January 1, 2019, the Communications Committee will develop a PowerPoint pitch for use by presenters from the Speaker's Bureau, highlighting AAUW's mission and the initiatives we support and present it to the Board at the January meeting.

**Action 2:** During the 2019-2020 program year, presenters from our Speaker's Bureau will make at least two presentations to diverse groups in the Lake / Sumter area.

**Objective 3:** Publicize the monthly meeting programs to leaders of diverse groups in Lake and Sumter Counties.

**Action 1:** Beginning with the 2018-19 program year, the Communications Committee will obtain information from the Program Committee to create an announcement about each monthly meeting and send it to leaders of relevant clubs in The Villages. The Communications Committee will also track the number of responses, positive and negative, and the clubs that the responders represent.

**Objective 4:** Explore joint programs, co-sponsoring programs with other groups.

**Action 1:** During the 2018-19 program year, the Board of Directors will explore co-sponsoring at least one joint event with another group in The Villages or surrounding community.

**Action 2:** Co-Presidents of the Lake / Sumter AAUW will invite leaders of relevant clubs to attend the 40<sup>th</sup> Anniversary Celebration; they will also track responses, positive and negative, and the clubs that the responders represent.

## **Inclusiveness Plan**

### **Inclusiveness Definition**

AAUW National offers a definition of inclusiveness that we used in our discussions.

“Inclusion is the act of creating environments in which any individual or group can be and feel welcomed, respected, supported, and valued to fully participate. An inclusive and welcoming climate embraces differences and offers respect in words and actions for all people (University of California, Berkeley)” (AAUW *Diversity and Inclusion Toolkit 2015*, <https://www.aauw.org/resource/diversity-and-inclusion-tool-kit/>, accessed February 8, 2018).

Although clearly related to diversity, inclusiveness emphasizes the *process* of welcoming members to the organization and helping them become part of the established culture. The committee found our branch to be welcoming, with “current [members] readily welcoming [newcomers] and [helping] them learn the ropes, [but new members] have to figure out for themselves how the established culture works and how to fit in” (AAUW Organizational Inclusiveness Stages, <https://www.aauw.org/files/2015/11/Organizational-Inclusiveness-Stages-handout-nsa.pdf>, accessed February 24, 2018).

### **Inclusiveness Goals**

- A. **Goal:** Help new members learn about the mission of AAUW as well as the goals and activities of our branch.

**Action 1:** Beginning in September 2018, the Membership Committee will create guidelines for and implement a welcome system, pairing veteran members with newcomers.

**Action 2:** Each veteran will encourage and invite new members to participate in activities such as committees, interest groups, and special events.

- B. **Goal:** Welcome guests to branch events and follow up for interest in membership

**Action 1:** The Membership Committee will solicit email addresses and phone contact numbers for guests who sign in at monthly meetings and follow up with each one. The Membership Committee will report the responses to the Board every two months.

### **A Final Note**

We found this process to be informative and stimulating. We learned a great deal about the ways in which our branch operates, and we had far-reaching discussions that captured our values and our visions. We thank the Board for creating this opportunity and we hope this report is useful.