Advancing Racial Equity in Philanthropy Workshop

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2019 Forum Annual Conference

Racial Equity Workshop

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Workshop Purpose

Our Purpose Today Is To:

• Provide some depth of understanding of aspects, dimensions and levers of change in advancing organizational equity;
• Create space for individual and small group reflections on where you are, where you are going, and potential focal areas to move forward;
• Support identification and commitment to next steps; and
• Offer an overview of the upcoming Equity Peer Learning Communities program and related resources.
Workshop Agenda

Part One: Setting the Foundation  
(1:45-3:15pm)

• Welcome, Sessions Overview, Introductions & Working Agreements  
• Overview of Dimensions of Equity  
• Mini Self & Organizational Equity Assessment  
• Small Group Reflection and Learning  
• Full Group Discussion and Takeaways  
• Soft Close
Workshop Agenda

Part Two: *Putting it Into Practice*  
(3:45-5:15pm)

- Applying Dimension and Levers of Equity-Based Change  
  *(individually and in small groups)*
- Full Group Learnings and Applications
- Individual Commitments and PairShares
- Overview of Racial Equity PSO Member Learning Opportunities Moving Forward
Who’s In the Room?

Who is here alone?

Who is here with a few others from your organization?

Who is just getting started on an equity journey (e.g., no clear equity vision connected to values, strategy and programs)?

Who has formalized equity work and begun implementing changes (e.g., has an equity team, begun programmatic changes, etc.)?

Who has been involved in implementation for a few years (e.g. have cycles of reflections about what’s working, what’s not and why)?
Workshop Principles

1. Recognize and value the multiple perspectives in the room.
2. Commit to deep listening and learning from each other.
   - Seek to expand your growing edge
3. Notice your experience, emotions and feelings; lean into discomfort; speak from “I.”
4. Call on deep courage; hold each other in kindness and rigor; maintain confidentiality
5. Assume best intentions; acknowledge impact.
6. Surface fears, misgivings and hesitations, and develop capacity to work through them.
   - Thoughtful risk-taking
7. Call out the elephants / undiscussables.
   - Name / check assumptions
Principles/Agreements

Any questions, additions, changes?

How will we live into these principles?

Is there anything in particular you need to support your participation today?
Table Introductions

At your tables, please share three things about you (2mins):

• Your name, role and organization

• What about advancing your organization’s equity work is most exciting to you?

• What about advancing your organization’s equity work is most challenging to you?
Equity Overview: Setting the Foundation
Interaction Institute for Social Change (IISC) and
https://www.storybasedstrategy.org/the4thbox
Aspects of Equity

1. Intent, Beliefs & Will (conscious and unconscious)

2. Awareness, Sight & Perception

3. Knowledge, Skill & Action (inc. joint reflection, meaningful metrics, celebration & course-correction)

All Aspects Include Bravery

Adapted from http://www.racialequitytools.org/resourcefiles/petty.pdf
Dimensions of Equity

*Each of these dimensions of equity/inequity can manifest implicitly & explicitly (consciously & unconsciously)*

- **Individual**
- **Interpersonal**
- **Institutional**
- **Systemic/Structural/Societal**

Key aspects of pursuing equity at all levels includes feeling, connecting with emotions, and “un-numbing” ourselves & each other
**Individual & Interpersonal Dimensions**

- **Individual**: Internalized opinions, beliefs, perspectives, assumptions, stereotypes, etc. about one’s own cultural groups and others
- **Interpersonal**: How we relate to, treat, understand, interpret and interact with others; conscious and unconscious bias, based on attitudes and beliefs
- **Stages of Intercultural Awareness (from the IDI)**:*
  1. Denial (lack of awareness)
  2. Polarization (Defense/superiority, denigration; Reversal/exoticize)
  3. Minimization (“we’re all really the same”; “color-blind”; “melting pot”)
  4. Acceptance (deep understanding of sameness and difference; sight)
  5. Adaptation (ability to frame-shift and shift behaviors with clear values; action/skill)

Examples of Individual & Interpersonal

Conscious and unconscious perspectives, perceptions & choices about:

• Individual:
  ► What we read, movies we watch, etc.
  ► What we believe or assume about ourselves and our own cultures
  ► Where we live

• Interpersonal:
  ► Who we are friends with and spend time with
  ► What groups we choose to join
  ► What types of social or cultural events we attend
  ► How we communicate and how we listen/hear
  ► What we know, assume or believe about other cultures or groups

• Other?
Institutional Level

Adapted from [http://www.racialequitytools.org/resourcefiles/petty.pdf](http://www.racialequitytools.org/resourcefiles/petty.pdf)
Institutional: *Structural & Technical Dimensions*

**Policies & Practices:**

1. Mission, Vision & Values
2. Leadership, Planning & Policies
3. Program Structure
4. Operations
5. Communications (internal & external)
6. Human Resources & Performance Management
7. How Success Is Defined and Measured (research and evaluation)
8. Financial Management and Analysis
9. etc.

Adapted from [http://www.racialequitytools.org/resourcefiles/petty.pdf](http://www.racialequitytools.org/resourcefiles/petty.pdf)
Institutional: Social, Emotional, Cultural & Political Dimensions

(*often disconnected from Structural & Technical Dimensions)

**Norms & Relational:**

1. Organizational culture and climate (inc. assumptions, beliefs & trust)
2. Collaboration & communications structures, processes and relationships
3. Access, inclusion, opportunity and cultural responsiveness
4. Deep learning about and with non-dominant communities (asset- vs. deficit-based)
5. Robust partnerships with multi-identity communities; role of “ally”
6. Depth of analysis and focus on context, history, and power
7. Personal reflection, growth & mutual accountability

Adapted from [http://www.racialequitytools.org/resourcefiles/petty.pdf](http://www.racialequitytools.org/resourcefiles/petty.pdf)
Institutional Examples

Conscious and unconscious filters, policies and decisions on:

- What is considered “high quality” work
- What we think is “success” or “impact”
- Who we hire; who is (and is not) considered a “fit” with our organizational culture
- What is considered “competence” and the appropriate ways competence can be expressed (e.g., communication styles)
- What is considered “high” or “low” capacity
- Who we partner with
- Whose voice is considered valuable, prioritized and accommodated
- Other?

Adapted from [http://www.racialequitytools.org/resourcefiles/petty.pdf](http://www.racialequitytools.org/resourcefiles/petty.pdf)
from *Awake, Woke, Work: Building A Race Equity Culture* by Equity in the Center

At the **AWAKE** stage, organizations are focused on people and on building a workforce and boards comprised of individuals from different race backgrounds. The primary goal is representation, with efforts aimed at increasing the number of people of different race backgrounds.

At the **WORK** stage, organizations are focused on systems to improve race equity. The primary goal is integration of a race equity lens into all aspects of an organization. This involves internal and external systems change and regularly administering a race equity assessment to evaluate processes, programs, and operations.

Although an organization may identify overall with one stage of the Race Equity Cycle, on any given level it may be at a different stage. For example, an organization can be Woke overall, but may need to activate Managers in the Awake stage.
Structural / Systemic / Societal Dimensions

- Analysis and focus on context, history, power & privilege
- Neighborhood, city-wide, state-wide, regional, national, global
- Cross-sector (education, health, jobs, housing, environment, etc.)
- Historical patterns and practices over time; system of accumulated advantages & disadvantages
- Grassroots & grasstops relationships
- *Intersectional* lens (relationship between race, ethnicity, socioeconomics, gender, language, LGBTQ, etc.)
- Collaborative structures and joint partnerships for dialogue & lasting change
- Conscious and unconscious policies, actions & cumulative effects

Adapted from [http://www.racialequitytools.org/resourcefiles/petty.pdf](http://www.racialequitytools.org/resourcefiles/petty.pdf)
Inner and Outer Focus

• Social & emotional skills
• Presence, openness, centeredness
• Knowing when we're triggered & having skills and tools to stay engaged (& knowing how this may appear different in different cultures)
• Healing; capacity to process grief, trauma & release tension
• Courage and vulnerability; ok with “not knowing”
• Deep connection and compassion

Adapted from http://www.racialequitytools.org/resourcefiles/petty.pdf
Self and Organizational Mini-Assessment

Hand Out Assessment
Small Group Reflection Questions

Share some reflections from your assessment:

1. What are some areas where your spending significant effort?
2. Where do you feel things are going well?
3. Where are you or your organization struggling? What is causing or contributing to these challenges?
4. What are some areas where there is no current effort? What is preventing a focus on these areas for your or your organization?
5. How are you feeling about your and your organization’s journey at this time?
6. What may be next directions for you and/or your organization?
Full Group Discussion

Popcorn share out from each group
Soft Close

• We’d like to hear from someone at each table

What’s a new learning, an aha or epiphany, or a re-remembering that you are taking with you from this session?
Applied Equity: Putting it into Practice
Reminder of Workshop Purpose

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Applying Dimension and Levers of Equity Change: The Approach

Step 1: Identify one concrete equity change you are trying to advance.

Determine the dimension(s) associated with this change effort.

How does “Awake to Woke to Work” help inform this area(s) of focus?

Step 3: Identify a near (or longer term) goal/outcome associated with this equity change effort.

Step 4: Determine a concrete action or next step to help advance the effort.

OPTIONAL
Step 5: Define how you will know you’re on the right track and what feedback loops will support this knowledge.
Applying Aspects, Dimension and Levers of Equity Change: *The Worksheet*

Hand Out Worksheet
Small Group Reflection Questions

• Share some of your approach/plan
• Reflect on some of the considerations and questions that are emerging for you related to applying equity dimensions and levers of change
• Use a coaching approach by asking each other open ended questions to help create more clarity, e.g.:
  ▶ What’s important about this to you?
  ▶ What impact might this have on you and/or your organization?
  ▶ How might you get support in doing this work? (deepening equity capacity can be challenging!)
Full Group Discussion

Popcorn Sharing &
Insights / Ah-hah’s / Takeaways?
Individual Commitments and Pair Shares

Coming out of this session, I am committing to

__________________________________________________________________________

in order to create ________________________________
Overview of Racial Equity Member Learning and Practice Resources

• Racial Equity Peer Learning Cohort
  ▶ Up to 40 participants from 20—25 organizations who will be engaged in a two year program that will include coaching, online learning sessions, and in person, half-day convenings at the 2020 and 2021 Forum Conference.

• Curated Racial Equity Listserv with monthly readings, reflections and practices

• 2020 Webinar on Advancing Racial Equity in Your Organizations

• Member Grants to support equity efforts
Share Your Feedback

- Please take a couple of minutes and share what you thought of today’s session. We want to hear from you!
- Session surveys are available in the conference app.
- Navigate to the session and click on “Session Survey” underneath the session description & speakers.
Thank You

What’s Next?
- 5:30 - 7:00 pm, Clips, Conversation & Cocktails, Orchid Ballroom (6th Floor)
- 6:00 - 9:00 pm, Outings and Activities (Pre-registration is required)
  - Corner Alley Bowling (6:00 - 9:00 pm)
  - Brewery Tour (6:00 - 9:00 pm)
  - Cleveland Creameries Tour (6:00 - 8:00 pm)
  - Walking History Tour (6:00 - 9:00 pm)