



Workbook for Organizational Equity and Cultural Responsiveness

ABSTRACT

To build capacity with racial equity and cultural responsiveness, practice can be important. These activities provide content and structure to develop practice ideas for implementing nine elements of racial equity in an organization. A pretend organization is used to ground the activities.

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Introducing the Organization

For all tasks, the group is to imagine that they are developing an equity intervention plan for this organization: Youth Success Incorporated (YSI). YSI is an imaginary organization that has the features of being a community based organization that has a board of directors and is located in Santa Cruz. Its features are that it serves youth who are struggling at school, and who are involved with the youth justice system, with diversion programs or probation or who have been released from custody. The goal of the organization is to provide wraparound supports to keep youth out of (a) further involvement with the justice system, and (b) drug and alcohol addictions. Its measures of success are these, as well as successful completion of school, meaningful community engagement, family connection and positive mental health.

Youth Success Incorporated (YSI) holds characteristics of the composite measures of the 43 people who responded to the pre-session survey done to prepare for this training.

Here is a summary of these characteristics (mostly repeating content covered earlier):

- YSI is at the start of their equity journey, with these elements showing their readiness for deeper work:
 - Top leadership supports (ED and Board of Directors) doing racial equity work, both for clients and for staff
 - Anti-racism mostly understood in the organization
 - The organization consults once or twice a year with clients and the community to get input on new directions, but sometimes ignores this input
 - Funders value doing equity work
 - Little resistance exists in the organization for doing racial equity work
 - YSI has enough Spanish speakers to ensure that someone is at the organization who can interpret for Spanish-only speakers
 - YSI collects data on the racial identity of its clients and staff (but not its volunteers, including the Board). It uses the federal data standards to collect data. It reports out on who is served by race/ethnicity, and who is on staff by race/ethnicity. No outcomes are reported by race. For the purpose of some tasks in this session, some disparities information is needed, so we will presume that the following exist at YSI:
 - Staff diversity is at 25% Latinx, while the Santa Cruz demographics are 33.5% Latinx;
 - At management levels, staff diversity is at 15% Latinx;
 - The client population is 50% Latinx which reflects the composition of students who are struggling academically and involved with the juvenile justice system;
 - Other clients are not represented at YSI, despite making up 9% of the Santa Cruz population. Of this 9%, let's assume that half are struggling academically.
- YSI is involved in advocacy work, with two activities held in 2018:
 - YSI held a forum for its clients on immigrant rights to ensure they had information on how to limit their likelihood of being deported
 - The organization recently advocated with the federal government to preserve funding for after-school programs which would have (a) cut their budget, and (b) caused students to lose needed supports
- YSI has done these equity initiatives in place:
 - Considering doing an equity assessment, but has not yet selected the team or the tool

- Has an equity committee in place, made up of the ED, three managers and two line staff who are outreach workers. Two members are Latinx. The ED attends occasionally. Its role has been to do outreach for new hiring, to sit on the hiring committee, and to organize the community sessions when the organization has asked for input. It also organizes brown bag lunches with guest speakers four times a year. Given the ED sits on the committee, it does not report anywhere except to them.
- Does not have an equity staff position

When you are asked to complete the task, imagine yourself providing advice for this organization and that you are on staff within the organization. At the close of your time on each task, you will be asked to speak with the members of your own organization and discuss the modifications that you would make for the task to occur in your own organization.

Summary of Tasks in each Domain

Domain	Standards (serves to synthesize literature and community knowledge)	Task Please don't assume that your colleagues know how your ideas connect to equity... explain when making suggestions
1: Commitment, governance and leadership	An Equity Team is responsible for providing leadership of the organization's work on racial equity and cultural responsiveness, while the Board/governance body is responsible for assuring the caliber and usefulness of its services. Ideally a staff with these responsibilities (full time or part time) resources this committee.	TASK: What specific roles do you think an Equity Team should take on in your organization?
2: Racial equity policies & implementation practices	The [racial equity] policy clearly identifies the rationale for cultural responsiveness and for racial equity, allowing all staff and volunteers to understand the benefits to service users, the community, the organization and to wider society that can emerge	TASK: What language will you include in a Racial Equity policy?
3: Organizational climate, culture and communications	The organization views the knowledge and experiences of service users as essential to the wellbeing of the organization. Their perceptions of services, culture, respect and quality are given primacy in the assessment of the organization's cultural responsiveness. <ul style="list-style-type: none"> Method for this task is to build system for service user feedback through client satisfaction surveys, suggestion box, small group discussions (etc), collected regularly, analyzed and used for planning and training. 	TASK: Design a service user feedback process that could be used in your organization to gather input regularly on the quality of your organization's services.
4: Service-based equity	Staff engage in continuous learning about their own biases, assumptions and stereotypes that limit their ability to be culturally responsive, and to understand how these biases affect their work with service users. <ul style="list-style-type: none"> Method for this task is embedding roles into job descriptions. Supervision, evaluation and training reinforces the importance of this critical self-learning 	TASK: Craft a segment of a job description that identifies equity skills, defining them in measurable ways. The assigned job description is "Wraparound Client Advocate" whose main role is to support clients as they navigate your own organization's wraparound services as well as coordinating and engaging with external service providers in education, justice and mental health services.
5: Service user voice and influence	Input from service users is gathered to confirm the relevance of programs and services. The organization responds to shortcomings. <ul style="list-style-type: none"> Method for this task is to ensure that client input can be disaggregated by race, refugee status, language and for first and second generation immigrants Aim to ensure that CAB (or relevant community members) endorses the approach 	TASK: What racial and cultural identities are important for you to capture in a client satisfaction survey? How do you want to be able to disaggregate your findings?
6: Workforce composition and quality	The organization retains, promotes and integrates workers who share the racial identity of service users. <ul style="list-style-type: none"> Method for this task includes hiring former service users as staff 	TASK: Hiring former users of services is valued in some sectors such as addictions, gang violence reduction, and consumer-led mental health programs. The task is to explore your own and your organization's beliefs about the assets such hiring brings to practice as well as the potential risks.

7: Community collaboration	<p>The organization actively supports the policy issues of importance to communities of color.</p> <ul style="list-style-type: none"> • Method is listening to local communities who are served or potentially served by the organization regarding desired improvements to services and advocacy 	<p><i>TASK: Develop a plan for a one-day listening session/s with key communities that you serve, or that rely on the clients who you support. Your goal is to gather input on two things: cultural relevance of services, and the advocacy priorities that they hold and would value your efforts to address.</i></p>
8: Resource allocation and contracting practices	<p>The organization has a minority contracting and subcontracting policy, and collects appropriate disaggregated data to assess effectiveness of the policy.</p>	<p><i>TASK: Identify the minority owned businesses that you know of and services they can provide to your organization. Additionally, identify how you would find the following minority contractors: bookkeeping, stationary supplies, and strategic planning facilitators.</i></p>
9: Data, metrics and quality improvement	<p>Racial disparities are assessed across the organization at each point of service, and updated annually.</p>	<p><i>Task: What disparities should be tracked in the organization? These are typically access, retention and outcome measures. Identify 1 that is immediate and 1 to be added next year.</i></p>

1: Commitment, governance and leadership

TASK: What specific roles do you think an Equity Team should take on in your organization?

You have decided that YSI needs to strengthen its Equity Committee which serves as the “driver” to move equity forward in the organization.

From the literature, we have learned the following information about successful equity committees:

- They are the body for shouldering the role of creating and implementing an equity plan, but this does not remove responsibility for results from the ED and the Board, as well as the relevant department leaders;
- They work best when they are supported by a staff person whose job description is about equity expertise. Sometimes this can be a part-time role for a full-time staff, making it less expensive than a full time hire;
- An equity committee needs some budget to implement its priorities;
- The organization needs to resist making progress on equity the responsibility of the one equity staff. This is one reason the equity committee exists, because it roots responsibility in a larger group of people, with significant participation from upper management;
- Equity committees are stronger when they include community members and service users (or former service users) because these people are not beholden to the organization so are more willing to “rock the boat” and they typically hold greater urgency to create good results;
- Equity committees need to work collaboratively with staff to increase the “buy in” that staff have. That said, consensus does not need to exist for interventions to move forward. Trying to get consensus will thwart progress and sometimes deflate the energies of the equity committee;
- Equity committees (and equity staffers) should not report to Human Resources, but rather to the ED and Board.

Procedures for this task:

1. Brainstorm the activities and roles you think are important for the Equity Committee at YSI.
Remember, brainstorming is to generate a broad reach of ideas, and to get everyone to participate. Someone needs to record these ideas on paper so they can be visible to the group to reflect on later. Do not debate the importance or relevance of the ideas, just capture them on paper. Also, recognize that your group will have different levels of familiarity with equity ideas and action, so please take a minute to explain any ideas that might not obviously be connected to equity.
2. Divide this list into four categories
 - a. Really important ideas, and less important ideas
 - b. Ideas you can implement, and ideas that you will need to rely on others to implement
 - c. Things that are really important to do in Year 1 of the Equity Committee
 - d. Things that are longer term in nature, and should wait for Year 2 (or later)
3. Look over your list of activities, and now “morph” these activities into what you think are important roles for the equity committee.

4. Prepare a 3-minute report-out to the group on what you would identify as
 - a. The roles of the Equity Committee (that could be written into its terms of reference)
 - b. The activities that should be done in the first year

5. If you have time, break into your organizations, and discuss the adaptations to these roles and activities that you think would be needed for the Equity Committee to be successful in your organization.

2: Racial equity policies & implementation practices

TASK: What language will you use to include in a Racial Equity Policy?

The Portland region has deep experience of many organizations developing Racial Equity policies. These have been deemed essential to embed good intentions into organizational and institutional policy. As more organizations began this work, we did a literature review of such policies around North America and consolidated what were emerging as “best practices” for this work. The following were identified as key elements in the work:

1. Provide a vision of racial equity
2. Justify the need for the policy
3. Lead with race
4. Recognize the role of partnerships
5. Recognize the role of resource allocation
6. Offer concrete next steps and accountability mechanisms
7. Provide definitions
8. Add ratification date

Here is the advice provided in the Protocol about the first three items in the policy:

- 1. PROVIDE A VISION OF RACIAL EQUITY.** Begin the Policy with a positive strengths-based vision of what your organization is trying to achieve and what successful advancement of racial equity will mean. Include a connectivity to the community or communities targeted by your organization. Ensure a specific focus on racial equity while highlighting that improved outcomes for communities of color improves outcomes for all. Here is an example:

“The Portland Plan declares a vision for Portland where: all Portlanders have access to a high-quality education, living wage jobs, safe neighborhoods, a healthy natural environment, efficient public transit, parks and green spaces, decent housing and healthy food; the benefits of growth and change are equitably shared across our communities, and no one community is overly burdened by our region’s growth; all Portlanders and communities fully participate in and influence public decision-making; and Portland is a place where your future is not limited by your race, ethnicity, gender, sexual orientation, disability, age, income, where you were born or where you live.” (from City of Portland)

- 2. JUSTIFY THE NEED FOR THE POLICY.** Outline current and/or historical racial, ethnic and linguistic inequities related to the populations that your organization serves or engages. List specific communities experiencing inequities. Utilize culturally-appropriate data and research and cite the research. Use the most local and specific data available to you. Ensure that discussion of inequities is not solely broad-based, but includes specific inequities in the organization or entity adopting the policy. Connect inequities with organization and system structures. Here is an example:

“Oregon faces two growing opportunity gaps that threaten our economic competitiveness and our capacity to innovate. The first is the persistent achievement gap between our growing populations of communities of color, immigrants, migrants and low income rural students with our more affluent white students. While students of color make up over 30% of our state – and are growing at an inspiring rate – our achievement gap has continued to persist. As our diversity grows and our ability to meet the needs of these students remains stagnant or declines – we limit the opportunity of everyone in Oregon. The persistent education disparities have cost Oregon billions of dollars in lost economic output and these losses are compounded every year we choose not to properly

address these inequalities.” (from Oregon Education Investment Board and Department of Education)

6. OFFER CONCRETE NEXT STEPS AND ACCOUNTABILITY MECHANISMS.

Typically, this section includes the creation of a timeline (including yearly reporting requirements), as well as the mandatory creation of an Equity Plan (or its equivalent), alongside who is responsible for developing it, and the manner in which it is to be submitted for approval (typically to organization’s governance body). Here is an example:

“The Board will hold the Superintendent and central and school leadership staff accountable for making measurable progress in meeting the goals. Every Portland Public Schools employee is responsible for the success and achievement of all students. The Board recognizes that these are long term goals that require significant work and resources to implement across all schools. As such, the Board directs the Superintendent to develop action plans with clear accountability and metrics, and including prioritizing staffing and budget allocations, which will result in measurable results on a yearly basis towards achieving the above goals. Such action plans shall identify specific staff leads on all key work, and include clear procedures for district schools and staff. The Superintendent will present the Board with a plan to implement goals A through F within three months of adoption of this policy. Thereafter, the Superintendent will report on progress towards these goals at least twice a year, and will provide the Board with updated action plans each year.”
(from Portland Public Schools).

For this task, items 1, 2 and 6 will be prepared by the group. We know it is difficult to craft language together as a group, but a set of bullet points will be sufficient to share with the larger group.

Procedures for this task:

1. Create a list of ideas to include to answer items 1, 2 and 6 for YSI. Do this via brainstorming. Remember, brainstorming is to generate a broad reach of ideas, and to get everyone to participate. Someone needs to record these ideas on paper so they can be visible to the group to reflect on later. Do not debate the importance or relevance of the ideas, just capture them on paper. Also, recognize that your group will have different levels of familiarity with equity ideas and action, so please take a minute to explain any ideas that might not obviously be connected to equity.
2. Discuss these three lists, and cross-check them against the advice provided in the Protocol (listed above). See how the ideas can be shaped into “vision,” “need” and “accountability” statements. Note: In the section on “need,” you don’t have much information to identify specific disparities that YSI has created in terms of how well it is serving Latinx clients (its outcome data is not disaggregated as yet). We do know that there are some staffing disparities and some difficulty in accessing services for non-Latinx youth of color. Your policy might focus more on gathering the equity data, and requiring the organization to address it if disparities are found.
3. Prepare a 3-minute report-out to the group on what you would identify as the statements for YSI for sections 1, 2 and 6 of the policy.
4. If you have time, break into your organizations, and discuss the adaptations to this policy for your own organization.

3: Organizational climate, culture and communications

TASK: Design a service user feedback process that could be used in your organization to gather input regularly on the quality of your organization's services.

Few organizations routinely gather service user feedback about their experiences with the organization, and few seemingly act on it. Over the last 8 years, in Ann's experience, about 20% of students in social work settings have found that their organization gathers client feedback. It is mostly through a complaint box, and secondly through a survey administered once a year. When a survey is done, less than ¼ of students say that the survey results are shared with staff of the organization. While this is not a scientific process, it is certainly a missed opportunity to hear how services are experienced by clients, and an opportunity for empowerment within the organization is missed as well.

Feedback methods typically include the following:

- Client satisfaction surveys
- Suggestion box
- Complaint box
- Small group discussions and focus groups
- Program evaluations that have evaluators meeting with clients

It is important that these data are collected regularly, analyzed and used for planning and training.

Process Note: An increasing trend is for clients and community groups to press for accountability back to them once they have given their input. With community engagement becoming a standard practice in many organizations, it has often become a "check the box" approach where doing it gives the organization status and profile as an engaging organization. But all too often, input is ignored. At best, input does inform the organization, but the way that community wisdom and insight strengthens the organization is not publicly recognized, nor even shared back with those with who were consulted.

Content Expansion Note: A second trend is for issues of inclusion, welcoming and respect to be a focus for equity practice. While "climate" is a central feature, the relationally-based welcome experienced by clients is receiving high attention. Dr. John Powell (long-time racial equity advocate in California) has launched an initiative called "blueprint for belonging" and the importance of remedying the "outsider" experience is beginning to be seen in research. Outsider experiences and "othering" maintains the cultural dimensions of exclusion and marginalization, which can be resisted by a focus on inclusion and belonging.

Procedures for this task:

1. Create a list of ideas to gather client feedback for YSI. Include both methods and process ideas. Do this via brainstorming.

Remember, brainstorming is to generate a broad reach of ideas, and to get everyone to participate. Someone needs to record these ideas on paper so they can be visible to the group to reflect on later. Do not debate the importance or relevance of the ideas, just capture them on paper. Also, recognize that your group will have different levels of familiarity with equity ideas and action, so please take a minute to explain any ideas that might not obviously be connected to equity.

2. Review this list with a lens of “pros” and “cons” for each method. Consider how authentically clients will respond in different environments.
3. Select a method that you agree would be beneficial for learning about client experiences, particularly as they relate to racial equity in the organization.
4. Now identify several key questions to ask in each method you have selected.
5. Prepare a 3-minute report-out to the group on what you would identify as
 - a. The method you select
 - b. Key content you would gather insights about
6. If you have time, break into your organizations, and discuss the adaptations to these activities that you think would be needed for the client input gathering to be successful in your organization.

4. Service-Based Equity

TASK: Craft a segment of a job description that identifies equity skills, defining them in measurable ways. The assigned job description is “Wraparound Client Advocate” whose main role is to support clients as they navigate your own organization’s wraparound services as well as coordinating and engaging with external service providers in education, justice and mental health services.

“Hiring for equity” is much more than “hiring for diversity.” Employers are looking for key attributes that ensure they are able to do things such as:

- Work effectively with range of colleagues
- Support and contribute to an equity initiative at the organization
- Bring equity-specific skills into one’s specific job
- Bring an equity frame-of-reference into thinking about oneself, one’s services, and the organization. This can range from understanding the history of the community to understanding how policies influence the lives of clients being served, and from understanding how issues of white frailty impedes anti-racism progress to how to lead difficult conversations around race
- Critical self-reflection to support staff to notice their missteps and correct them before damage is done to clients and colleagues

A more elegant way of saying some of these is given below:

- Demonstrated commitment to racial equity, with experience in racially diverse settings or working with diverse communities.
- Deep understanding the culture, history and current disparities that certain communities of service users may face more broadly in society and within the organization.
- Experience in collaborating with community partners to identify shortcoming in the organization and in building partnerships to improve outcomes.

This is just a sample of how equity can and should appear in the capacities of staff in the organization. The organization might also opt to have several elements that are relevant for all job descriptions in the organization, becoming a standard to which all are held accountable.

Note that the job description is different than the language that might be in a job posting. A posting holds potential to achieve three goals: (a) explicitly invite the participation of candidates of color, (2) name equity as a service goal, and (3) name equity as a concrete organizational objective. Here are examples of each:

- Candidates of color are encouraged to apply. The organization is committed to building a culturally diverse and inclusive environment.
- Successful candidates must be committed to working effectively with diverse community populations, and expected to strengthen such capacity if hired.
- The organization is committed to racial equity across the organization: in its services to clients, in our workforce composition and practices, and in our organizational culture. While still seeking to improve our demonstration of this commitment, candidates should know that racial equity is a cornerstone of our commitment to all communities in the region.

For this task, we ask you to focus on the job description, which is highly performance based, meaning it lays out the expectations for what the candidate is responsible for in their work life at the organization.

Procedures for this task:

1. Create a list of ideas (related to racial equity and cultural responsiveness) to include as a job description for the YSI job opening: “Wraparound Client Advocate.” Do this via brainstorming. Remember, brainstorming is to generate a broad reach of ideas, and to get everyone to participate. Someone needs to record these ideas on paper so they can be visible to the group to reflect on later. Do not debate the importance or relevance of the ideas, just capture them on paper. Also, recognize that your group will have different levels of familiarity with equity ideas and action, so please take a minute to explain any ideas that might not obviously be connected to equity.
2. Review the list and select at least one in each of these areas:
 - a. Work with colleagues
 - b. Support the organization’s equity initiative
 - c. Equity and cultural responsiveness related to what one does as a “wraparound client advocate” roles (just imagine what these are)
 - d. Have equity capacity to bring to various roles
 - e. Critical self-reflection
 - f. Any others that you feel are important
3. Refine your wording for these elements making them observable and measurable if possible. This helps make assessment of how well the staff achieves them possible.
4. Prepare a 3-minute report-out to the group on what you would identify as the core elements of the job description for this position, as related to racial equity and cultural responsiveness.
5. If you have time, break into your organizations, and discuss the adaptations to these activities that you think would be needed for language around hiring a related position in your organization.

6. What is this person's race? Mark one or more boxes.

White

Black, African Am., or Negro

American Indian or Alaska Native — *Print name of enrolled or principal tribe.* ↴

Asian Indian Japanese Native Hawaiian

Chinese Korean Guamanian or Chamorro

Filipino Vietnamese Samoan

Other Asian — *Print race, for example, Hmong, Laotian, Thai, Pakistani, Cambodian, and so on.* ↴

Other Pacific Islander — *Print race, for example, Fijian, Tongan, and so on.* ↴

Some other race — *Print race.* ↴

An alternative framework has been established by the Coalition of Communities of Color in Oregon and subsequently written into policy by the State of Oregon, applying these to Departments of Health and of Human Services. It is likely forthcoming in the Oregon Department of Education. Something similar is already being used in Portland Public Schools.

1. Please share your origin, ethnicity, ancestry, country of origin, race, and/or Tribal affiliations in whatever way you wish.

2. What is your race or ethnicity? (You can choose more than one.)

American Indian or Alaska Native

- American Indian
- Alaska Native
- Canadian Inuit, Metis or First Nation
- Indigenous Mexican, Central American or South American

Hispanic or Latino

- Hispanic or Latino Mexican
- Hispanic or Latino Central American
- Hispanic or Latino South American
- Other Hispanic or Latino

African/African American

- African American
- African
- Caribbean
- Other Black

Pacific Islander

- Native Hawaiian
- Guamanian or Chamorro
- Samoan
- Other Pacific Islander

Asian

- Chinese
- Vietnamese
- Korean
- Laotian
- Filipino/a
- Japanese
- South Asian
- Asian Indian
- Other Asian
- White**
- Slavic (from the former Soviet Union)**
- Middle Eastern**
- North African**
- Unknown (if self or family not present)**
- Decline to answer**

Procedures for this task:

1. Create a list of ideas of the race and ethnicity identifiers that are important to you from an equity perspective to collect in a client satisfaction survey. Do this via brainstorming.
Remember, brainstorming is to generate a broad reach of ideas, and to get everyone to participate. Someone needs to record these ideas on paper so they can be visible to the group to reflect on later. Do not debate the importance or relevance of the ideas, just capture them on paper. Also, recognize that your group will have different levels of familiarity with equity ideas and action, so please take a minute to explain any ideas that might not obviously be connected to equity.
2. What additional identifiers do you think are important for YSI to know about different group experiences? Think about LGBTQ, income, disability and others that you believe are important.
3. Identify the language you would use for asking the race and ethnicity questions and one of the additional identifiers.
4. Prepare a 3-minute report-out to the group on what you would identify as the core elements of identifiers you will ask.
5. If you have time, break into your organizations, and discuss the adaptations that would likely be required if this were to be done in your organization.

6: Workforce composition and quality

TASK: Hiring former users of services is valued in some sectors such as addictions, gang violence reduction, and consumer-led mental health programs. The task is to explore your own and your organization's beliefs about the assets such hiring brings to practice as well as the potential risks.

There is minimal research on this practice. In theory and from the perspective of both the fields that use these staff and that of culturally specific organizations, there is considerable value in such hires:

- They the background of current clients (in terms of having whatever “conditions” are held, such as struggling at school, or having experience in addictions), thus understanding clients better and making it easier to engage;
- They also share what it is like to navigate the services used, and the range of services that may have been helpful and those that one might want to avoid. They tend to have well-developed sensitivity to helpful and unhelpful service providers, and will advocate more frequently;
- Less defended about the negative characteristics of the organization making it easier to understand client critique of the organization;
- More likely to share the cultural background of service users and be more effective at understanding their lived experiences.

Procedures for this task:

6. Surface the range of thoughts you each hold about hiring former service users for YSI. If it is a little tough, think about why the three sectors mentioned in the task are committed to such hires. Do this via brainstorming.
Remember, brainstorming is to generate a broad reach of ideas, and to get everyone to participate. Someone needs to record these ideas on paper so they can be visible to the group to reflect on later. Do not debate the importance or relevance of the ideas, just capture them on paper.
7. Categorize them into these four groups:
 - a. Highly positive
 - b. Somewhat positive
 - c. Somewhat negative
 - d. A big risk for the clients and/or the organization
8. Review your lists for (c) and (d). Select two that seem insurmountable and identify possible ways to move these concerns into more positive categories. Here's an example: you are concerned staff who share this experience might over-identify with clients and lose their professional edge. Spend time unpacking what “over-identifying” means to you and see if this might actually be an asset to the clients. If over-identifying means losing objectivity, perhaps objectivity serves to keep distance with clients in ways that protects staff but is likely to be harmful to clients.
9. Next, if you conclude that hiring former clients holds potential to contribute to the organization's clients in positive ways, identify three things you could do to make your organization more welcoming to such staff.

10. Prepare a 3-minute report-out to the group on the following:
 - e. The benefits of such hires for YSI
 - f. Two negative features of such hires, and how you can shift practice/perspective to reduce the potential harms
 - g. How to improve the organization's culture to be more inclusive of such hires

11. If you have time, break into your organizations, and discuss the similarities and differences in how your organization might perceive this issue.

7: Community collaboration

TASK: Develop a plan for a one-day listening session (or set of sessions) with key communities that YSI serves. Your goal is to gather input on two things: cultural relevance of services, and the advocacy priorities that they hold and would value your efforts to address.

Community consultations are a key element of most organizations' practices with those they serve. They are a good way to ensure the organization touches base with its constituents and that its operations are as relevant as possible to the lives of those it serves.

Procedures for this task:

1. A framework for planning this event has been created, identifying decisions that will help you to plan a useful day. Work through this plan, making modifications if you want/need. Imagine that you are planning this event for YSI. Please aim to listen to everyone in your group.
2. Once you have completed this, prepare a 3-minute presentation for the group that highlights key parts of your process and your content. Please don't try to fit all your ideas into this presentation!
3. If you have time, break into your organizations, and discuss the adaptations that would likely be required if this were to be done in your organization.

Planning Framework

Here are the decisions you likely need to make to achieve this:

1. What communities are served by YSI? If you need to imagine more details about YSI, please pretend and make them up!
2. Which are most important to hear from? Who are most dependent on the success of your programs?
3. What will be the best method to engage them to share information on the quality of our services? Which methods are best suited for which group? For example, if you want to hear from youth, parents, employers, other service providers and community leaders, you might want different methods to reach each group. You might prioritize youth, and decide that you need to attend each program site to ensure you reach the most numbers, but that engaging with employers needs to be done with a survey.
4. Now, let's assume that you are doing this as a one-day, single-site event, and are going to do what is possible to recruit your priority groups. What are the benefits these community members will get from participating? Will that be enough to get them to attend? What else might we need to do to get them to participate? Consider things like payment, meals, child care, gifts and public recognition for their roles (such as a certificate of participation or notice in your annual report).
5. Where should these sessions be hosted? How will community members get to the event?
6. What should we do to maximize the welcome they feel when they walk into the setting?
7. Now, to key issues. What are the specific questions you will ask them to get the information you need for:

- a. What they think of the cultural relevance of your services? Here are a few ideas to get you started:
 - i. Do you learn about things that are important to you?
 - ii. Is there anything in how we practice that is offensive to you?
 - iii. If you could add elements that you'd like us to cover, what would you like most?
- b. What advocacy priorities they have and what type of supports they want from you?
 - i. What blocks you from getting your child to school every day?
 - ii. What gets in the way of paying your bills?
 - iii. What types of racism and discrimination do you face most often?
 - iv. If you could change one thing about how others treat you, what would it be?
8. How will you maximize participation with those who attend? What are some good facilitation ideas to increase their engagement?
9. What type of reporting back to the participants should you do? YSI needs to ensure it responds to those who it asks for advice: what did you hear? What was done with this advice?

8: Resource allocation and contracting practices

TASK: Finding minority owned businesses can be difficult. Identify the minority owned businesses that you know of and services they can provide to your organization. Additionally, identify how you would find the following minority contractors: bookkeeping, stationary supplies, and strategic planning facilitators.

Minority owned businesses (as they are called in government policy in this sector) have been actively supported by most levels of government. Standard practices, without explicit equity criteria, has resulted in governments contracts being awarded to larger white-owned businesses, which means that public dollars (as these are government funds) are being invested in ways that widen racial disparities in income and wealth. Every dollar that becomes a profit for a white-owned business widens inequality both for who it directly enriches, and who it indirectly benefits. White people tend to do business with other white businesses, and even their household spending is segregated, because white people tend to live in neighborhoods that are segregated from people of color and businesses of color.

All organizations spend money. Most human service organizations spend most of their money on staff, but all (to varying degrees) spend money on contracts and subcontracts with a range of services. These might include office cleaning, office supplies, translation of documents, live interpretation for clients, ordering in meals, office repairs, consultants, printing publications, payroll services, accountants, auditors, hotels for putting up guests, courier services and more.

While getting such practices into policy is important (requiring a certain amount of spending to go to minority contractors, or requiring minority contractors be outreached to and considered for contracts), simply becoming familiar with such suppliers is a good place to start.

Procedures for this task:

1. Brainstorm all of the minority contractors that you know of in the Santa Cruz area.
Remember, brainstorming is to generate a broad reach of ideas, and to get everyone to participate. Someone needs to record these ideas on paper so they can be visible to the group to reflect on later. Do not debate the importance or relevance of the ideas, just capture them on paper.
2. Identify methods to find additional minority contractors, expanding your list
 - a. Who might have additional knowledge?
 - b. What information is available online?
 - c. What information does the local and state government have about minority contractors? (hint: they license firms to be registered as minority contractors!)
3. Identify how to share this information with YSI. How can you increase the likelihood that those who contract for services and supplies might use this list?
4. Now, a specific discovery task: Identify at least two minority contractors in each of the following three areas:
 - a. Bookkeeping
 - b. Stationary supplies
 - c. Strategic planning facilitators

5. Once you have completed this, prepare a 3-minute presentation for the group that highlights your methods, your sharing ideas, and those you identified as providers (for part 4)
6. If you have time, break into your organizations, and discuss the adaptations that would likely be required if this were to be done in your organization.

9: Data, metrics and quality improvement

Task: What disparities should be tracked in the organization? These are typically access, retention and outcome measures. Identify one that is immediate and one to be added next year.

A core feature of racial equity work is to understand one's own racial disparities. These disparities are typically not known by an organization. Here are some of the reasons:

- Most organizations have not been required by their funders to report out their data in disaggregated formats
- Organizations that are involved in this work typically only report out on the range of people served by the organization, and do not use these data (alongside other data from the Census Bureau or other institutions such as child welfare) to see if they have barriers to who is getting served by the organization
- Many think that calculating disparities is too complicated and that economists or advanced statisticians are needed... this is not the case. The formulas for these calculations are easy
- Those working on equity in the organization often think about culture, training and hiring. They don't think about the evidence base needed to see one's own disparities
- General resistance to this idea about knowing one's own situation and how the organization contributes to disparities... this is the 'head in the sand' response to inequity

The types of disparities that are assessed in organizations doing this work include the following:

- Workforce
 - Who works at the organization and does it reflect (a) the community being served, (b) the community that should be served, and (c) the population in the region?
 - Who is present at different levels of the organization, addressing whether the profile of line staff is the same as that of managers and executives? Conventionally, organizations get whiter at higher levels of the organization.
 - Who is present in different departments?
 - Who holds what type of paid work in the organization? Consider full time, part time, contracts with benefits, and contracts without benefits. Conventionally, the best jobs (full time permanent) are held by more white people.
- Volunteers
 - Who leads the organization, and does it reflect (a) the community being served, (b) the community that should be served, and (c) the population in the region?
 - Volunteers (particularly interns) might provide direct services and thus need to be added to workforce data, so the measure for "workforce" gets repeated with direct service volunteers added to the measure.
- Clients
 - Who gets into the various services provided by the organization? Sometimes entry into services is a benefit (higher education, treatment services) and sometimes entry into services is harmful (incarceration, child welfare).
 - Does the entry data differ from the general population? Does it differ from one's catchment population?
 - Who is involved at different sites in the organization? Often called "decision point analysis," this refers to the idea that certain communities tend to get deeper into a harmful service, or

less deep into a beneficial service. Disparities in client participation is thus measured in different parts of the organization's services. The comparison group would be who is in the service just before the decision is made to funnel some in and others out of the next level of service.

- Who stays in the service to complete the program? Are different groups dropping out at different rates?
- Who benefits from the services? Every organization has its own success metrics, such as students going into higher education, or diversion programs keeping youth from being charged again, or counseling reducing client's experiences of depression. New measures are not needed for this type of disparity measure – just that the results are disaggregated to ensure that communities are benefiting equivalently.

Procedures for your task:

1. Brainstorm the types of disparities that could be relevant for YSI.

Remember, brainstorming is to generate a broad reach of ideas, and to get everyone to participate. Someone needs to record these ideas on paper so they can be visible to the group to reflect on later. Do not debate the importance or relevance of the ideas, just capture them on paper.

Remember that YSI measures its success as:

- i. Reduce further involvement with the justice system
- ii. Reduce drug and alcohol addiction
- iii. Successful completion of school
- iv. Meaningful community engagement
- v. Family connection
- vi. Positive mental health

2. Now categorize each idea in these areas:

- a. Workforce
- b. Volunteers
- c. Client access to services
- d. Client retention
- e. Client outcomes

3. Discuss and identify priority measures that you would want to implement at YSI in:

- a. Year 1
- b. Year 2 or later

4. Once you have completed this, prepare a 3-minute presentation for the group that highlights the disparities you want to collect in Y1 and those for Y2 and beyond.

5. If you have time, break into your organizations, and discuss the adaptations that would likely be required if this were to be done in your organization.