

Deploying Casey's REI Framework



Lessons
from the
civic sites

About the Annie E. Casey Foundation

The Annie E. Casey Foundation is a private philanthropy that creates a brighter future for the nation's children by developing solutions to strengthen families, build paths to economic opportunity and transform struggling communities into safer and healthier places to live, work and grow.

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INTRODUCTION

The Annie E. Casey Foundation is committed to incorporating race equity and inclusion (REI) into every facet of its work. That commitment means race equity strategies should be present in every unit of the Foundation and every work plan should include REI performance measures. The Foundation sees this work as necessary to truly make a difference in the lives of the children and communities at the heart of its mission.

Discussions about race equity and inclusion among Casey staff have happened for many years. But the advent of the Foundation's REI focus has brought an intentional, specific effort to find and acknowledge where race-based gaps in equity of opportunity exist — both within communities and within the Foundation's own walls — and to make a concerted effort to infuse race equity and inclusion throughout the systems that affect the lives of so many children in our country.

Of course, that's a strategy that feels 100-percent right in theory, but how do you embrace it 100-percent in practice? To do so means not only to embrace the theories and apply the tools, but also to look inward to explore one's own perceptions, biases and assumptions. For most people, regardless of skin color, embracing a race equity framework is somewhat uncomfortable. It can get messy. And it can be confusing, especially when an entire organization is working together to figure out what, how and why to do this work. It's rather like building the proverbial plane while flying it.

To help Casey “build the plane,” the Baltimore Civic Site and Atlanta Civic Site — programmatic units dedicated to long-term investment in high-poverty communities of color in the Foundation's hometowns — volunteered to dive into REI as pilot units. They agreed to undergo trainings, conduct deep team discussions, study data, engage external partners, identify equity gaps and develop strategies to address gaps. This document shares the story of their foray into Casey's new REI landscape. Their experiences, successes, challenges and 10 key lessons learned can help other units within the Foundation and others in the broader field of philanthropy find their own paths for consciously incorporating race equity and inclusion into the work.

HOW WE GOT THIS FAR

Casey's Path and Investments in Race Equity and Inclusion

Race equity, which has long been part of Casey's DNA, has become the issue of our time. As a funder intent on ensuring all children have a brighter future, Casey cannot ignore the fact that children of color experience more than their share of hurdles in reaching that goal. As a data-driven organization, the Foundation cannot ignore the wide gaps that the data show when disaggregated by race. Moreover, as a funder motivated to have a life-changing impact through its work, the Foundation acknowledges the very real part that race plays in our society, our social and governmental systems and our field.

Casey can trace threads of race equity thought and discussion as far back as its inception. In 1995, staff within Casey created the RESPECT affinity group to discuss issues of racial equity, class, culture and power and to exchange ideas and concerns within the context of the Foundation's work in underserved communities. Grant-making initiatives such as *Making Connections* (launched in 1999) targeted neighborhoods where opportunities were hard to come by. Throughout it all, conversations about race equity were also taking place between Casey staff and the Board of Trustees.

In 2003, Casey began to explore the issue of race equity and inclusion more directly, creating or joining several

philanthropic organizations focused on advancing equity both internally as well as through their grantmaking. It also supported the development of the Race Matters Toolkit and Race Matters Institute, designed to help individuals and organizations directly define and address equity issues. Led by then-Senior Associate Nonet Sykes, Casey staff created a new REI framework in 2013, which has become a guiding beacon for all its work. Since then, Casey has continued to build a collection of tools and resources to help staff gain a deeper understanding of what race equity is, and how the Foundation might address it internally and externally. These resources are available to everyone via Casey's website.

Along with the creation of the REI framework, Casey released a groundbreaking report, *Race for Results*, in March 2014. This report reinforced the Foundation's commitment to race equity and inclusion and fueled further discussion and action in the broader field of philanthropy.

Casey's President and CEO Patrick McCarthy made race equity a priority in 2014 when he announced that staff would be responsible for incorporating race equity strategies, goals and metrics into their 2015 work plans. He and the Casey Board of Trustees also created a new position, director of Race Equity and Inclusion, now held by Sykes.

What We Mean by "Race", "Equity" and "Inclusion"

Race is a socially constructed system of categorizing humans largely based on observable physical features (phenotypes) such as skin color and on ancestry. There is no scientific basis for or discernible distinction between racial categories. The ideology of race has become embedded in our identities, institutions and culture and is used as a basis for discrimination and domination.¹

Equity is defined as "the state, quality or ideal of being just, impartial and fair."² The concept of equity is synonymous with fairness and justice. It is helpful to think of equity as not simply a desired state of affairs or a lofty value. To be achieved and sustained, equity needs to be thought of as a structural and systemic concept.

Inclusion is the action or state of including or of being included within a group or structure. More than simply diversity and numerical representation, inclusion involves authentic and empowered participation and a true sense of belonging.



Casey's REI Framework

Vision/Long-Term Result: All children are able to reach their full potential in life regardless of race, ethnicity or community of residence.

The Approach:

- Create the necessary culture internally to sustain race equity and inclusion efforts
- Externally generate a sense of movement building, galvanize the philanthropic sector and position Casey as a bold leader of this work
- Develop explicit results and strategies, collect and track data to measure the impact of investments and hold ourselves accountable

The Strategies:

- Educate and equip leaders with racially disaggregated data products to strengthen decision making and measure progress regarding equitable opportunities and outcomes
- Provide tools and share best practices that support the application of race equity and inclusion strategies
- Promote the implementation of race equity-focused policy and practice changes that increase equitable opportunities and outcomes for all children

The Programmatic Result: Casey staff, grantees and partners implement policy and practice changes that increase equitable opportunities and outcomes for children and families.

Casey's Atlanta Civic Site (ACS) and Baltimore Civic Site (BCS) volunteered to serve as pilot units for adopting and implementing the new REI framework. Civic sites are locations where Casey teams work directly in the community to build and invest in public, private and community partnerships that aim to improve education, job opportunities, health and neighborhood assets for kids and families living in these low-income communities. In Atlanta, the ACS team focuses on the city's Neighborhood Planning Unit V (NPU-V) that includes six neighborhoods just south of the downtown central business district. The BCS team focuses primarily on East Baltimore, but also takes part in citywide strategies.

The civic sites were ideal locations for piloting the REI framework. The place-based work helped with examining data from specific communities and designing pinpointed strategies to address identified needs. Also, the strong relationships the staff have with on-the-ground partners (potential allies in moving the REI agenda) can help to explore disruptions that might arise from race equity work.

The teams in the civic sites approached their REI work very differently, based on their histories, partnerships and staff experiences. This document explores those different experiences and illustrates how each team made REI most relevant to its work. It also shares the 10 lessons learned so far, although each team has just begun to scratch the surface of possibilities.

STORIES FROM THE FIELD

How the REI Framework and Approach Worked at Casey's Civic Sites

No two units within Casey are identical, so the Foundation's approach is fluid when it comes to supporting teams as they work to incorporate the REI framework. Casey has created — and continues to add to — a wealth of resources for staff to learn about race equity and explore ways to deploy the REI framework in their day-to-day operations. The Foundation retains consultants and experts who are available to provide tailored training and research. Casey also expects teams to incorporate race equity and inclusion measures into unit work plans. Teams are encouraged to find the paths that work best for them and to share what they learn along the way with the rest of the Foundation.

A Shared Springboard

Staff at both civic sites used most or all of the available Foundation resources — particularly Race Matters trainings and Casey's *Race Equity and Inclusion Action Guide* — to embed a race equity lens in their work.

The Race Matters training introduces participants to race equity concepts and tools and lays the groundwork for staff learning. In addition to helping staff understand the importance of REI to the Foundation's mission and learn about what constitutes institutional and

systemic racism, the training provides participants with hands-on tools to practice and apply what they've learned.

The Race Matters training was particularly eye-opening for staff at both sites. Participants noted several specific exercises that were especially useful, including organizational assessments, back mapping, journey mapping and exploring perceptions.

The organizational self-assessment helps teams determine how well they currently incorporate equity into their daily operations and how comfortable they are in discussing equity issues. "When we did the assessment for the team, lots of individual things were lifted up, and using that tool forced us to start to do some individual work," says Leah Austin, a former Atlanta-based senior associate who is now with the Southern Education Foundation. For example, one question in the assessment about the staff's own comfort level with discussing racial disparities resulted in very different answers between white and black colleagues. (Whites rated the organization's comfort level much higher than blacks did.) According to Austin, "It caused us to engage in a conversation about the fact that individuals make up an organization, and they come to the table with their own experience that then feeds into

the group experience. That was a new conversation for us.”

Back mapping is the systematic process used to identify the drivers of any given racial inequity that data show. For example, if the scores of one racial group of children differ significantly on a reading assessment compared with another racial group, it is important to look for institutional and structural drivers of this inequity. A back map draws upon race-informed research, the insights and perspectives of those affected by an issue and practitioner insights to identify the factors contributing to inequitable outcomes.

“Back mapping is the one exercise that stands out for me,” says Kweku Forstall, director of ACS. “It’s a tool that helps you to see very clearly how the causal factors of any issue might be related to race.” For example, he says, when the group was addressing high school graduation rates, they found data that showed boys of color, largely African American, were performing poorly. Through further back mapping, they could see that one of the issues that might be leading to this underperformance was not having enough culturally competent male teachers of color in the classroom. “So now one of the things that we want to think about,” says Forstall, “is how do we get more teachers who are men of color and culturally competent in the classrooms.”

In **journey mapping**, another part of the training, participants study their own lives through a structural lens to identify the policies and related factors that have shaped their experiences and perceptions related to race, and discuss them one-on-one with others or in

small groups. In another exercise, staff study news clippings to understand how things are presented in the culture, and what the subtext can reveal. During that exercise Senior Associate Janelle Williams talked about a news broadcast that focused on a homicide. A portion of a comment from an African-American boy stating that he wanted to have a gun when he grew up was included in the story. However, his complete statement was: “When I grow up, I want to have a gun because I want to be a police officer.” Williams says that caused her to question her own assumptions and perceptions, based on what she had read in (and read into) the story.

“Activities like the journey-mapping exercise, those personal activities; it’s really a different type of learning. It’s a revelation,” she says.

In addition to the training, both teams found Casey’s seven-step Race Equity and Inclusion Action Guide — a resource to help organizations adopt a race equity lens — to be helpful as they considered how to approach their work. “I find it particularly useful in the way it talks about and depicts REI not just in words, but visually,” says Sophie Dagenais, BCS director. “For us, it put more intense attention on the need to do a racial impact analysis and that really resonated with me.” She adds, “We need to ask questions about outcomes we’re interested in; we may get positive results, but are we really eliminating disparities?”

Different Approaches

Even though both sites had access to all of Casey’s consultants, trainings and tools, the very different characteristics

Definitions

Back Mapping: A back map begins with the identification of a racial disparity on a specific indicator (e.g., staff retention rate, program participation, health status, unemployment). From this, the user draws upon three key sources of information to identify drivers of inequity on the indicator: available research, the insight and perspective of those most affected by the issue and practitioner perspectives. The back map drives toward development of overall strategies for change on given indicators.

Journey Mapping or Racial Biography: In the racial biography, participants study their lives through a structural lens to identify the policies and related factors that have shaped their experiences and perceptions related to race.

Summary of Race Matters Training: At the introductory Race Matters training, organizations learn about key race concepts, develop a shared language for talking about racial equity and institutional and structural racism and are introduced to three core tools to help ensure that their work is race informed and broadly embraced.

and circumstances at each location have made the process of learning about and adopting the REI framework very different as well.

ATLANTA: FROM THE INSIDE OUT

For over a decade, the Atlanta Civic Site has worked in a set of neighborhoods that make up the city's NPU-V. Roughly half of the children in NPU-V live in poverty, and its residents earn about half of the city's median income and experience higher unemployment rates. The staff at the civic site focus on improving educational outcomes, reducing barriers to economic opportunities and strengthening the vitality of NPU-V neighborhoods.

Atlanta staff participated in their first Race Matters training in the fall of 2013, but then went through a significant shift in staffing and structure. In 2014, Kweku Forstall became director of the site and facilitated the team's transition and full integration as employees of the Casey Foundation. Until that time, team members had been employees of the Community Foundation of Greater Atlanta.

The focus was on making sure staff have a clear picture of what REI means to their team and exploring how strategies might play out in the community. "Our effort was to first say we need more training. To me, it was a priority," says Forstall. "I wanted to make sure staff here were as comfortable as possible with the framework." Together, the Atlanta team has examined the data to determine the ways in which race is a factor in their work, and have begun the process of deciding how to incorporate their new knowledge into REI-focused

strategies. In many ways, the Race Matters training helped the new ACS staff gel as a unit.

Atlanta staff used back mapping to view the data for NPU-V and compared them with the rest of the metro area. What they found was eye-opening. Levels of poverty, low educational attainment and low home values were highest in majority-black neighborhoods like NPU-V. The availability of jobs, access to transportation and new development that were so prevalent on Atlanta's mostly white north side were virtually nonexistent in NPU-V and other neighborhoods on the south side.

Armed with the new data, Forstall and his team agreed that the first step was to share it more broadly throughout Atlanta, using Casey's platform as a respected national grant maker to heighten awareness of the equity issues that exist in the city. Led by Senior Associate Janelle Williams, they produced *Changing the Odds: The Race for Results in Atlanta*, a local adaptation of the KIDS COUNT policy report released by the Foundation in 2014. The goal of the Atlanta report was to highlight the team's new REI approach and help other organizations and city leaders realize that to address entrenched problems in education, workforce development and poverty, they would have to address issues related to racial disparities and equity. The Atlanta team connected partners to training and technical assistance to support individual and shared outcomes.

"We used back mapping in this report in a way that brings a fresh perspective to some of the root causes of problems in Atlanta," says Williams.



“It’s different because we aren’t really reporting outcomes, but instead saying, ‘These are some contributing factors.’” She went on to explain that the Race Matters training had helped the team understand how to be strategic about their investments and how to identify areas where necessary changes should be made.

The Atlanta Civic Site has used its convening power, both with its close partners and in the broader community with the launch of its report, to help spread the training, language and intent of its REI work. Partner organizations have asked for more training, including the Atlanta Regional Commission, which oversees regional planning and intergovernmental coordination for the 10-county metro area. Since the launch of the report, civic site staff have made presentations to numerous organizations and key system leaders, including Atlanta Public Schools and the Atlanta Workforce Development Agency, about how to bring the REI approach into their systems. Staff also have engaged the Center for Social Inclusion to provide training to ACS grantees and partners.

The ACS staff have made significant shifts in the way they approach each of their grant-making portfolios as a result of their REI work:

- The team used the back-mapping technique to explore third-grade reading data and the impact of teachers of color on the performance of students of color (and students overall). As a result, the civic site is researching opportunities for identifying and addressing how implicit biases impact educational equity.
- ACS is exploring economic inclusion as a pillar of its family economic success grant making and its neighborhood transformation projects. “This is something we never looked at before,” says Williams, who leads the family economic success portfolio. “A racial equity focus compels us to do business differently. We convened our family economic success partners and they have identified key indicators they would like to collectively work on to change the odds for families and communities. Beyond the traditional grant making, we have to fortify and sustain the collective

capacity to increase access to family-sustaining careers, building an infrastructure of opportunity with residents and other partners.”

- In the neighborhood transformation strategy, the team is also working to ensure that local businesses and entrepreneurs have the opportunity to economically benefit from the changing local market. An assessment of these predominantly African-American operated businesses is being conducted in order to provide them with appropriate technical assistance and capital as the area gentrifies and attracts new businesses and customers.
- The team is exploring how to incorporate the REI approach into its two-generation strategy — which aims to simultaneously equip children and their parents with the tools for financial stability and economic success.
- Staff are thinking more critically and expansively about whom to engage in their local work and how to make those working relationships more equitable. “Given that our work is place based, we need to have an explicit focus to support the local community and grassroots organizations that can make a meaningful difference and disrupt current trends from a variety of diverse positions and perspectives,” says Williams.

BALTIMORE: FROM THE OUTSIDE IN

The Baltimore Civic Site team works with partners throughout the city, with a special focus on East Baltimore, where poverty levels and unemployment are disproportionately high and educational

attainment is disproportionately low compared with other parts of the metro area. The team has helped create a new community-based school, provided access to financial coaching and job training, worked to reduce infant mortality, built residents’ leadership abilities and supported commercial and residential development.

BCS staff have a long tradition of working within local communities, participating in community initiatives that often were created with an implied (if not explicit) focus on racial equity, such as B’more for Healthy Babies (which aims to reduce Baltimore’s infant mortality rate for African-American infants) or the Family Literacy Coalition’s efforts to ensure that youth are reading on grade level. Many of the tools included in the Casey REI framework (such as back mapping, which is also known as root cause analysis) were already in use among some of these groups. As a result, BCS staff have taken more of an outside-in approach to incorporating the framework.

“We’ve been focused on a community engagement strategy and emphasized resident engagement,” explains BCS Director Sophie Dagenais. “But we landed on a need to develop our own selves in this area, to think differently about how to embed REI in all our work, how we conduct ourselves, do our strategic planning, everything we do.” She explains that her team needed to look at disparities and inequities more conscientiously, and as that conversation evolved, the team decided to pursue a much broader strategy.

Staff added a specific line item dedicated to REI into its annual

budget and drilled down deep into existing relationships to determine how to structure that approach. The team realized the need to move beyond funding at the intermediary level, where organizations are typically larger, white-led and have longstanding relationships with Casey. The BCS team recognized that by focusing primarily on intermediaries, they were missing the chance to support more grassroots, resident-led initiatives — particularly those led by people of color.

In response, BCS staff focused on developing a community grants program, using a community-based intermediary, Fusion Partnerships, to serve as fiscal agent and provide technical assistance and coaching with a sensitivity to and value for cultural competence and community empowerment. Fusion Partnerships works with grassroots initiatives in East Baltimore to incubate them and help them grow.

“As we engaged folks in communities, we learned that we had a reputation of being inaccessible as a foundation,” says Danielle Torain, a senior associate with the Baltimore Civic Site. “So the process of designing our community grants platform was just as important as the platform itself. Residents and community stakeholders decided that the best starting point would include partnering to implement a community listening project as a way to cultivate new relationships, explore resident perspectives around a community grant-making concept and bring others into the fold.”

Torain and her team members see this process as an opportunity not only to get grant funds deeper into

the community, but also to serve as a pipeline to diversify their other core portfolios and bring community relationships into the Foundation more intentionally. “The time we spend in conversations with others about racial equity doesn’t relate to a particular metric, but it’s a really important element to what we do because we’re changing the dialogue and building the relationships necessary to make progress on our REI goals,” says Torain.

The Baltimore team now pushes its partners to be more explicit about how equity is incorporated into their work. “That doesn’t always require a financial investment, but asking the right question in the right context and with the influence of Casey makes all the difference,” Torain says.

The BCS team has made several investments of money, time and connections to underscore its REI agenda. In addition to the Fusion Partnerships community grants program mentioned above, other examples include the following:

- Infusing the work of the Baltimore Direct Services Grants (BDSG) program with a race equity lens in partnership with other funders. Started by Casey in 1995, the BDSG program funds community-based or community-serving nonprofits that offer summer enrichment opportunities for children and youth from low-income families in Baltimore City. The team developed a common RFP process that helped level the playing field to give smaller nonprofits equal access to funds, while making the application process easier.

- Sponsoring REI training for all the partners that support B'more for Healthy Babies, a citywide initiative led by the Baltimore City Health Department and supported by a diverse group of public and private implementation partners to ensure that babies are born full term, at a healthy weight and ready to thrive in healthy families.
- Co-creating the Baltimore Youth Leadership for Change Fund, in partnership with the Baltimore Community Foundation's Neighborhood Grants Program, to foster new and existing youth leaders and address the root causes of injustice and inequity in their lives and communities.
- Advising and coordinating a shared space-planning effort between Henderson-Hopkins school, the community-based school Casey helped to create, and the surrounding neighborhoods to provide the community access to portions of the facility, such as the gym, meeting spaces and auditorium.
- Managing and advising One Baltimore for Jobs (1BFJ), a federally funded initiative that targets unemployed residents between the ages of 16–29 in the city's predominantly African-American, low-income neighborhoods, with an emphasis on areas most impacted during the April 2015 unrest.
- Funding for the development and implementation of an REI framework for KIPP (Knowledge Is Power Program) in Baltimore — the first in the national KIPP network.

For the Baltimore team, the internal work of REI was perhaps more challenging than the external. As in Atlanta, the team also experienced some significant shifts in personnel before the race equity pilot and was building trust in light of that transition while tackling REI work.

Part of the challenge was the fact that REI was (and is) still being defined at Casey. “We were asking ‘What is this? What will it be? What are we trying to achieve?’ It felt like there were fits and starts,” says Dagenais.

For Gena O’Keefe, who has been working with equity issues through Casey’s partnerships with B’more for Healthy Babies and others, the team’s training seemed to discount the strides already made. “I think they could have started off by saying, ‘In terms of the way you all are doing your work, you’re actually pretty far ahead of a lot of people,’ which is actually true. Instead, people often get into a negative space and can miss the positive things we’ve done.”

Says Torain: “I feel we’ve been able to do a lot on the ground externally, but it’s been a bit harder to get the team to have a discussion, in terms of internal practice, about what this means. We started with a review of the work, making sure everybody on the team was on the same page. Part of the challenge is that while we are taking ownership for our bodies of work, we’re not getting beyond that to say as a team how it all works together. We need to explore more effective ways to approach REI collectively.”

COMMON THEMES AND LESSONS

While the experiences of teams in Baltimore and Atlanta are very different, they report a number of common themes and lessons from their race equity and inclusion work so far.

1. USE DATA TO FRAME THE ISSUES

In a data-driven organization like Casey, having numbers to support REI work provides a clearer focus and a way to present race issues in a non-threatening, non-judgmental way.

“One of the things that works well is that when we do Atlanta trainings we use Atlanta data,” says Atlanta’s Forstall. “Baltimore uses Baltimore data. It’s very tailored and customized; it should be. And it provides some very practical tools for figuring out how and where you start to tackle the proverbial elephant in the room.”

Learning how to present data — which is included in the Race Matters training — is also helpful. Explains Forstall: “It gives you confidence that you can go in and talk about a very difficult issue without just using anecdotes or emotion. You’re talking outcomes, you’re talking results, you’re talking reality and data back that up.”

2. CREATE EXPLICIT LANGUAGE

Both teams found the REI framework’s intentional use of language gives people a common language for talking to each other about race equity and inclusion,

especially internally. “For me, it felt just like a natural progression and that we were maturing and graduating from one-on-one conversations here and there to thinking about it more deeply,” says Leah Austin, a former Atlanta senior associate. “I think language matters. It helps to make a space feel safe.” Giving partners and others specific definitions of equity versus equality has advanced the work, she says. “When we did our launch, that was something a number of people talked about. They felt like there was real clarity around the differences between equity and equality. That is a huge win for us.”

The framework also gives staff a license to be more forward about the Foundation’s priorities. Says Torain: “We can now say that this is a priority of the Foundation and in order for us to invest, we actually have to see some type of an equity component. We can ask those questions, where before, we didn’t have that same opening to do that.”

3. THINK ABOUT WHOM TO ENGAGE OUTSIDE YOUR TEAM

It pays to spend time thinking about whether and how those most affected by race equity and inclusion in the community are involved in the work. In some cases, outside perspectives can help a team shape their understanding of race equity and inclusion in a community. In other cases, they can

provide a clearer picture of how grants or partnerships can be most effective. A high level of inclusion can also avert community skepticism that may exist about a funder's role, intent or efficacy when it comes to race equity.

"We're looking for opportunities to see how the conversations we're having and the tools we're using are showing up in our work," says Dagenais. "Have we talked to the right people? Are we making assumptions about how this will work? In doing that, all of a sudden we feel the presence of REI as a value rather than a transaction or a program."

4. MAKE SPACE FOR THE PERSONAL

With any shift in team dynamic or culture, many personal factors come into play, from different personality types to different levels of risk tolerance to different frames of reference. All of these factors apply to conversations about race and equity. In fact, although the tools incorporated by Casey are highly analytical, the very nature of racial equity is highly personal. All members of the Atlanta and Baltimore teams interviewed reported that they felt uncomfortable at some point talking about issues of race during their work to implement the REI framework. Yet each of them also emphasized how important it is to lean into that discomfort, rather than away from it.

This personal discomfort was not the purview of any particular skin tone. "Some people were feeling like it was all about white people understanding black people; that it is a one-way understanding," says O'Keefe. "But actually, staff of various races were saying it's a two-way thing. We're all here working together. We all need to meet each other where we are. I think

there is some normalizing about just having those conversations."

Team members say it's key that everyone in the group feels comfortable and "safe" discussing topics that are difficult or awkward. They need to know that they can speak their minds or ask questions without being ridiculed or criticized and without risking censure. They also need to understand that everyone on the team is taking a risk together, and that discomfort may be the rule rather than the exception.

"The role of leadership in setting this tone was really important," Torain notes. "Having the Foundation's president and chief executive officer name 'safe space' as a value and expectation was critical in helping staff feel comfortable enough to venture into these tough dialogues."

5. VALUE OUTSIDE FACILITATION

Taking advantage of Casey's consultants and facilitators made it easier for the teams to have necessary but difficult conversations. This was particularly true for the Atlanta team.

"Because they're outsiders and consultants, there's an ability to push an issue that an internal staff person may shy away from," says Austin. "That ability to push people's thinking, push people out of their comfort zones is a huge, huge benefit."

6. BE READY FOR A SHIFT IN VIEWPOINTS

Team members in both Baltimore and Atlanta report significant shifts in their own understanding and perspectives about race inside the Foundation and in the communities it serves. These range from subtle nuances to full-scale epiphanies.

“When I started Foundation work I was really focused on, ‘How do we help people beat the odds?’” says Williams. “Now I understand that the way we measure results, the way we reward results, cannot be focused on beating the odds, but on changing the odds.”

“I worked in education reform for several years, but I never looked at disparities based on race — probably because 99 percent of the kids at schools I was working with were African American,” says Forstall. “It didn’t occur to me to raise a question of equity in the way things were funded. I would say now, through this process, I am much better equipped to talk about race in the context of whatever I’m doing. Even though I’m a black man who’s lived in Atlanta for 30 years, I just feel better equipped now.”

7. AVOID THE COMPLIANCE MENTALITY

It may be tempting to engage in REI-related work on the surface because it’s expected, while not fully immersing oneself personally in the exploration of race and perception. It may also be easier for team leaders to present REI framework discussions in the spirit of compliance — therefore avoiding potential discomfort but also missing the deeper benefit of this work.

“Part of the risk taking is just giving people the room to experience this kind of training and these kinds of conversations internally and to feel it’s a safe place to do that,” says Forstall. “If you don’t, you’re not going to get half the people to participate except in a compliance manner — and that would be the worst outcome.”

8. MAKE TIME FOR UNDERSTANDING AND EMBRACING THE WORK

Several staff wished that they had been more purposeful about devoting time for themselves or their team to engage in REI-related discussions and activities. They say the payoff is worth the investment in terms of moving oneself and one’s team forward.

“If I could do it again, I would advocate for the team to have more time to reflect and to plan in a much more strategic way,” says Williams. “I would really push us to see REI as a way we do our work, not just another separate body of work.”

9. REMEMBER THAT THIS IS A TEAM EFFORT

Beware of making assumptions that employees of color should be the de facto leaders of REI work, or that one person can do the work on behalf of a team. “It needs to be a team-wide priority and not necessarily the responsibility of one staff person,” says Torain.

In addition, each unit should be aware of its team culture. “Staff have varying experiences at Casey relative to their particular work,” observes Williams. “Everyone will go through the training, but what comes out of it and how do people really advance the work? It’s important to really understand the culture you’re working in and have the flexibility to be strategic without compromising your results.”

10. RECOGNIZE PRIVILEGE

Several team members noted that anyone working at Casey, regardless of race, is working from a position of privilege. Staff pointed to this fact as motivation to explore an REI agenda. “We have to use that privilege to make a difference,” says Forstall. “How we use that position in allocating our resources is what it’s all about.”

CONCLUSION

Truly embedding race equity and inclusion into philanthropic work isn't easy. Even with an intentional program of training and engaged, committed staff leaders, the process can be uncomfortable and the way forward uncertain at times. But the potential reward is transformation not just of the results achieved, but also of the people achieving them. "When I think about what I'm learning at Casey, I know that if I ever return to the private sector, I'd return a very different person," says Dagenais. "I am so much richer and more informed and more sensitive, more human, because of these kinds of conversations. They are the greatest gift we can give ourselves."

To Learn More

The civic site staff members featured in this report are ready and willing to answer questions from other Casey units about their experiences in piloting the REI framework. You can contact them directly using the information below.

ATLANTA CIVIC SITE

Kweku Forstall, *director*
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To learn more about Casey's history with race equity and inclusion, or about the tools and resources available to help advance REI, please contact:

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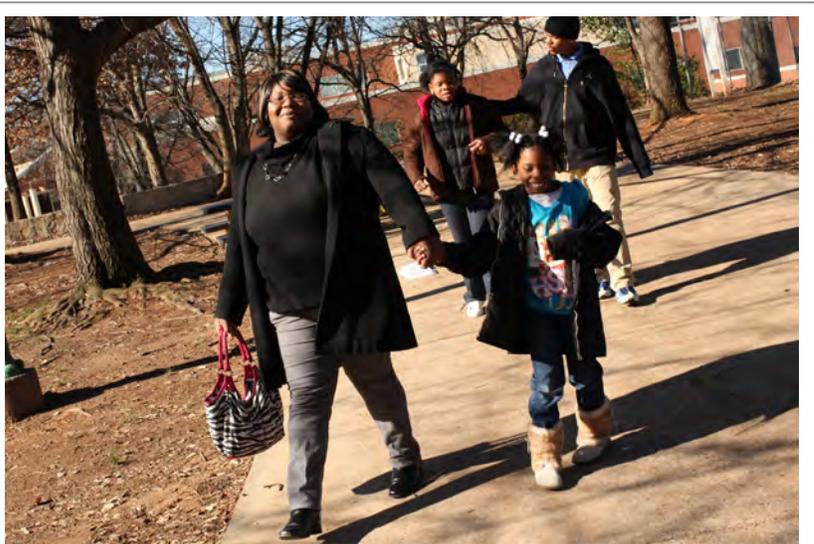
You may also visit our site:

www.aecf.org/blog/a-collection-of-key-race-equity-and-inclusion-resources

ENDNOTES

¹ Omi, M., & Winant, H. (1994). *Racial formation in the United States: From the 1960s to the 1990s*. New York and London: Routledge.

² The Free Dictionary is a website that is comprised of a collection of dictionaries by subject, including medical and legal together with free and subscription encyclopedias, in multiple languages (www.thefreedictionary.com/equity).





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