

## Consulting with a Racial Equity Lens Tool

*Consulting with a Racial Equity Lens* tool is developed for internal and external consultants to support their process in working with clients and sponsors. There are many resources which guide consultants through the consulting stages (e.g. Block's *Flawless Consulting*, Freedman and Zackrisson's *Finding Your Way in the Consulting Jungle: A Guidebook for Organization Development Practitioners*, and Wheatley, Tannenbaum, Griffin and Quade's *Organization Development at Work: Conversations on the Values, Applications and Future of OD*) as well as how to use action research for the assessment process (Coghlan and Brannick's *Doing Action Research in Your Own Organization*, Weisbord's *Organizational Diagnosis*, and Lewin's *Action Research*). This tool provides questions and tips for the consultants to unpack privilege, power, and oppression through the consulting stages.

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Beth Applegate, Applegate Consulting<sup>1</sup> suggests these action research questions to reflect on after each consulting stage:

- What was I paying attention to?
- What were my observations of the client? What did you learn about the power dynamics in the system? Who spoke up? Who appeared motivated? Whose opinions were valued? etc.
- What was the observable data? Reflect on your inferences, assumptions.
- What excited me about the client opportunity? How might that impact the interaction?
- Did I feel any triggers? What was I thinking and not necessarily sharing?
- What did my intuition tell me about this client and the issues present?
- What ladders of inference or assumptions did I make?

### A. Pre- Entry

1. Reflect on your different group identities (gender, race/ethnicity, class, sexual orientation etc.)
  - Assess your awareness, with others, of your privileges, as well as the stereotypes and biases of your different group identities.
  - Think about how your internalized racial superiority and/or internalized racism<sup>2</sup> may come up in your interactions with individuals, groups and this client.
2. Reflect on your awareness of different types of power and your skills to identify these dynamics on the individual, group, and community level.<sup>3</sup>
3. Reflect on your knowledge of structural racism and your skill level to identify how it manifests.<sup>4</sup>
4. Reflect on how you believe change evolves and how might people of different racial/ethnic group identities believe how change evolves.<sup>5</sup>
5. What type of support do you need in addressing racism, privilege, and power issues?
6. If working on a team with different racial/ethnic group identities for this consulting project, have there been discussions about: oppression, power and privilege issues? How to define the roles of team members to lessen the reinforcement of stereotypes? How to assess our process and give feedback regularly?

7. Reflect on how this possible contract may conflict and/or complement your core values: What was the process used to recruit consultants? What are the values of the organization? Have you identify a support network to discuss interventions if asked to collude? What are my bottom-line issues that I will walk-away from the contract? For this work, who are you accountable to?

## **B. Entry and Contracting**

1. What, if any, are the differences between how the presenting issues are being defined by different racial/ethnic identity groups within the organization? Are the differences between how the different groups define the problem known to each other? Have they discussed their differences in perceptions and experiences?<sup>6</sup>
2. Is the presenting issue(s) being defined on the intra-, inter-group and/or system level(s)? At what level is the client's expectation for change to occur?
3. Who is being impacted the most by the presenting issue? Are those most impacted defining the issue and identifying solutions?
4. Reflect on how ready (motivation, commitment, capacity of the client system etc.) the organization and the client are for the change process. *(While in a standard OD intervention, practitioners might decline work based on client commitment, readiness and capacity, it is important to have flexibility re: the level of readiness with the need to address the reality of any type of inequity and its impact on the individual, organizational, and community.)*
5. Reflect on how to build your or your team's relationship with the full group as well as with the different racial/ethnic identity groups. What might you need to modify in the process or be aware of based on your own different group identities?
6. Assess the type of gatekeeping<sup>7</sup> behavior with the people you are working on the project and/or being supervised by.
7. In terms of negotiating the contract, what power differentials (other than the sponsor/supervisor/consultant role) and privileges do you need to be aware of with the person or people who you will be reporting to and collaborating with?
8. Co-define and discuss with sponsor and supervisor how to develop a collaborative relationship for this project including transparent communication, process agreements, and reflection/evaluation processes.
9. What observations were made during this interaction regarding race, power and privilege? What is your assessment at this stage of the: organization's climate and culture regarding their support and commitment to an inclusive and equitable work environment? Their knowledge of power and privilege issues? Their confidence/comfort level talking about inequities, power and privilege issues? Openness to change?<sup>8</sup>
10. Based on what you learn through the entry and contracting process, is this a good fit based on your knowledge, skills and values?

11. Assess your interaction with the client: What were the privilege and power issues present? How did your different racial/ethnic group identities play out in the interaction? When did you collude? What were the barriers that stopped you from intervening? When did you intervene? Was it effective? How did you create transparency in the contracting process?

### **C. Data Gathering and Analysis**

1. How will data be gathered and reported back to the client system? Are the assessment tools culturally competent? Multilingual? How will the data gathering process address the privilege, inequities and power issues?
2. How are equity and power issues discussed by the full group? By identity groups? Between staff and board? With constituents? (patterns, process, climate)
3. What are the "under the table" issues not being discussed by the full group? Between race/ethnic identity groups?<sup>9</sup>
4. What are the patterns of responses when an individual or a group raises a difficult issue, especially one involving race, inequities, power and/or privilege? Are there different patterns of response by various staff groups? By race/ethnic identity groups?
5. What are the processes used for dissemination of organizational information (procedures, policy changes, public announcements) within the organization?
6. Within the formal decision-making process, who is included and excluded from the process? What are their roles within the organization and what are their racial/ethnic identities?
7. What are the consequences if the decision-making structure and process are not followed? Are there different consequences based on roles within the organization and/or racial/ethnic identities?
8. How are ideas and/or concerns given credibility within the organization? What are the racial/ethnic identities and staff roles of the individuals who may provide credibility to an idea or concern?
9. How do the different groups (staff and race/ethnicity groups) respond to conflict? Are there different responses based on the identity group or role of the persons involved in the conflict?
10. Learn more about a significant organizational change process completed by the organization in the past. How was the previous change process perceived by different groups (staff groups and racial/ethnic groups) within the organization? What type of resistance took place?
11. What are the opportunities for new leadership to emerge within the organization? What are the barriers for new leadership to emerge? What are the characteristics of leaders which are most affirmed?
12. How is the organization currently perceived by constituents? Are there different perceptions based on racial/ethnic identity groups? What is the process for determining resources and services for constituents?

13. Where on the spectrum do most constituents view the organization - as welcoming and open or exclusive and closed? Are there different perceptions based on racial/ethnic identity groups?
14. What is the level of involvement of constituents in the decision-making process of resources and services? Are constituents encouraged to provide input, insight, and/or direction? Are there opinions reflective in organization's decisions? Are there different levels of involvement based on racial/ethnic identity?
15. How do different groups (board, senior staff, and administrative staff) respond to concerns, ideas from constituents and their leadership? Are there different responses based on racial/ethnic identity groups?
16. Describe the organization's strengths, commitment, and skills to create an equitable inclusive organization through addressing privilege and power issues.
17. Describe the organization's challenges, patterns, and lessons to be learned to create an equitable inclusive organization through addressing privilege and power issues.
18. What are the perceptions of how change works within the organization? Do they expect change to happen through this process on the individual, group, organization or field/movement level?<sup>10</sup>

#### **D. Data Feedback Tips**

1. "People have different perspectives about how the world works and why things are as they are. Those different perspectives have to be included in the information you gather. In addition, existing data has to be considered with a critical eye, since it will reflect prevailing power dynamics (that is, who is counted, what is considered success, what missing data are considered important or unimportant, etc.) If you accept information at face value, your group may unintentionally end up drawing conclusions that reproduce a mindset that reinforces racial inequities and structural racism.  
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2. In sharing data, an important responsibility is making sure people who view the data understand an institutional/structural analysis of why these differences exist in the organization and how they might be corrected. The reason this is so important is that, without a context for viewing the data, people will create their own explanations. Those explanations may or may not be based on facts.
3. Ask different groups if "they see themselves" in your assessment findings – and take seriously their comments and recommendations for improving the accuracy of the picture your assessment draws, and its implications.
4. Observe reactions to your assessment when you present them to different groups. Share information in single race groups and in mixed race groups, and in multi-generational, multi-

racial/ethnic and multi-class groups – each reaction will tell you something important about what you have found, what’s missing and how to present information to various groups.”<sup>11</sup>

## **E. Action Planning and Implementation Stage**

1. Reflect, again, on your privileges, as well as the stereotypes and biases of your different group identities and on how it may come up as you move into action planning and implementation. To avoid a “father/mother knows best” scenario, what do you need to check regarding ego, process, power and privilege?
2. When creating the action plan, it is important to discuss again what a collaborative effort looks like and identify people’s roles and responsibilities. How will constituents be involved in creating the action plan and implementing the plan? Are those most impacted by the issue involved with equitable role and voice?
3. How will the action planning process address privilege, inequities, and power issues present in the organization?
4. What are some of the informal and formal organizational processes regarding: decision-making, dissemination of information, addressing difficult concerns, conflict etc. that will need to be changed or modified so they reflect an inclusive and equitable organization?
5. What discussions and skill-building modules need to occur with staff groups and race/ethnic identity groups to prepare for implementation which will include adopting new or modifying informal and formal organizational processes?
6. What type of resistance are you and others observing? What steps need to be taken to address resistance to change? (See Peter Block’s *Flawless Consulting* chapter on Dealing with Resistance)
7. How does the action plan and implementation process ensure there will be staff and organizational capacity building of the skills, knowledge and processes necessary to create and sustain an inclusive and equitable work environment?

## **F. Evaluation and Reflection**

1. Assess your interaction with the client: What were the privilege and power issues present? How did your different group identities play out in the interaction? When did you collude? What were the barriers that stopped you from intervening? When did you intervene? Was it effective? How did you create transparency in the contracting process?
2. If you worked on a team for this consulting project, discuss: What were the privilege and power issues present? How did your different group identities play out in the interaction with the client? With each other? When did you collude? What were the barriers that stopped you from

intervening? When did you intervene? Was it effective? How would you rate your transparency of communication within the group? With the client?

3. Reflect on the feedback from the client. What do you need to change next time? What worked well based on their perceptions? What are the areas do you need to grow and develop in increasing your knowledge and improving your skills to address privilege, power and oppression?

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<sup>1</sup> Thank you to Beth Applegate for reviewing this document and providing feedback. To learn more about Beth's work – [www.applegateonline.com](http://www.applegateonline.com)

<sup>2</sup> Definition Internalized Racial Superiority: *A complex multi-generational socialization process that teaches White people to believe, accept, and/or live out superior societal definitions of self and to fit into and live out superior societal roles. These behaviors define and normalize the race construct and its outcome: white supremacy.* From Racial Identity Caucusing: A Strategy for Building Anti-Racist Collectives –Crossroads Ministry. Internalized racism: Definition of Internalized Racism is the situation that occurs in a racist system when a racial group oppressed by racism supports the supremacy and dominance of the dominating group by maintaining or participating in the set of attitudes, behaviors, social structures and ideologies that undergird the dominating group's power. From Donna Bivens, "Internalized Racism: A Definition" –Women's Theological Center

<sup>3</sup> For more information, [www.racialequitytools.org/resourcefiles/veneklasen2.pdf](http://www.racialequitytools.org/resourcefiles/veneklasen2.pdf)

<sup>4</sup> For more information, <http://www.racialequitytools.org/ci-issues-sr.htm>

<sup>5</sup> For more information, <http://www.racialequitytools.org/tipsheets/tipsheet-ii-a-laying-out-your-assumptions.pdf>

<sup>6</sup> For more information, <http://www.racialequitytools.org/tipsheets/tipsheet-i-a-reasons-for-starting-implications.pdf>

<sup>7</sup> Gatekeeping definition: "Gatekeepers act as the buffers between institutions and communities. This is not necessarily negative, as communities often need gatekeepers. However, we need gatekeepers who are accountable to the communities and not the institutions they represent. Gatekeepers can keep people and resources in, or they can keep people and resources out. This does not mean that we are stupid or bad people. The socialization process that sometimes happens to us when we are immersed in White Institutional Culture ensures that we become so invested in the institution that our vision and values become one with the institution. Again, the challenge is to shift the incentives, values, status and rewards toward doing well on community terms..." From Barbara Major, Chapter 7, "How Does White Privilege Show Up In Foundation and Community Initiatives?" p. 76 – *Flipping the Script: White Privilege and Community Building* – Potapchuk, Leiderman, Bivens and Major.

<sup>8</sup> For more information, <http://www.racialequitytools.org/pi-ics-ocp.htm>

<sup>9</sup> "Under the table refers to those behaviors and beliefs seen as illegitimate or perceived as too risky to openly address." Marshak and Katz – *Keys to Unlocking Covert Processes*

<sup>10</sup> For more information, <http://www.racialequitytools.org/tipsheets/tipsheet-ii-a-laying-out-your-assumptions.pdf>

<sup>11</sup> From [www.racialequitytools.org](http://www.racialequitytools.org) TipSheet: II. C. Assessing your Community Part Two: Creating and Implementing an Assessment Process, created by Center for Assessment and Policy Development and MP Associates. <http://www.racialequitytools.org/tipsheets/tipsheet-ii-c-assessing-community-part-2.pdf>