



# CASE STUDY

- The Service Program

**Note:** *The following case study is fictional and solely for learning purposes.*

# The Service Program

A multi-racial non-profit was excited to use the Racial Equity Toolkit to better serve their clients. Even though they supported racial justice, they realized that their internal processes needed to change. Their staff members were making decisions *for* the community instead of *with* community, and they wanted to shift power to their BIPOC clients to promote racial equity.

In the summer, the non-profit conducted a series of listening sessions to better understand community perspective. The top issue for the Black and non-white Latino/a clients, was the inability to save for the future and continually being in a cycle of financial stress. At the time, the non-profit did not have an existing program to address this concern. To be responsive and work *with* community based on their stated needs, the staff agreed on creating a new program using the Racial Equity Tool to design it from start to finish.

Staff included one African American woman, one Asian American woman, one Latina woman, and one white woman. Together, the team dedicated their first meeting to start [Groundwork](#). The staff regularly talked about structural issues. The root cause analysis helped them to dig deeper into how their programming solved specific issues. After completing the [Root Cause Analysis](#) individually, they talked as a team to strengthen the final analysis. It was clear that the racial wealth divide – which started with Indigenous land removal and chattel slavery of African Americans – was the root cause. It also became clear that unresolved systemic racism that their Black and Brown clients experience across employment, education, housing, transportation, and immigration exacerbated this issue.

After completing the Power Distribution Roster, they noticed that the Brown and Black women on staff lacked decision making power. As a result, they empowered all staff to have equal decision-making power on all projects.

The team reviewed the BIPOC Engagement Spectrum and realized they had only previously "consulted" their clients. The team recognized the need to empower clients and agreed to engage with BIPOC stakeholders at the empower level.

The team identified potential alignment/intersections in Part 3 with the Community Health Improvement Plan, Children and Youth Master Plan, ACPS Equity for All Strategic Plan, several Small Area Plans and the non-

profit's Strategic Plan. They also found connections to at least three City priorities.

As homework, they each completed the Reflection Guide. They met two days later to share their answers and keep one another accountable to completing all the steps in the Groundwork section.

Now it was time for [Stage 1, "Align and Co-Design."](#) The team was slightly nervous but excited because this was their first time creating a program from scratch with their clients in a way that respected their power as equal decision makers – not just people with whom they "consulted" for feedback.

Completing the chart in [Stage 1's "Co-creating Terms of Engagement"](#) was relatively easy, because the team was connected to BIPOC with lived experience, and their BIPOC clients recommended that a program like this could better serve them. Staff directly connected with clients with whom they had existing relationships.

Staff struggled to complete the fourth question that asked about their budget to pay BIPOC communities for their time and engagement. They met with their director to discuss options that honored the time, expertise, and desired terms of engagement of BIPOC experts who were directly impacted. They were only able to reserve \$500 in their budget to start.

The team noted the need to request budget funding specifically for future engagement. Another person even recommended adding this as a standard line item in their grant proposals to funders. The director thought that both proposals were good ideas that the non-profit should implement.

They connected with a group of BIPOC clients to identify the needs of directly impacted BIPOC communities in Step 2. Asking these questions informed their formal meeting with BIPOC experts who would be joining the team in [Step 3, Initial Terms of Engagement](#). Staff used the input gathered in client calls during [Step 2](#) to determine the best time, location, child care option, and meeting format for the first meeting with the non-profit.

The client expert and the non-profit staff member welcomed everyone. They shared the goals of the meeting, which were to: (1) co-create the terms for engagement between the community and organization

## The Service Program (continued)

(2) agree on the topic that will eliminate current racial inequities, and (3) co-create the processes and structures for future stages. Each facilitator took turns speaking and they were mindful to hear from everyone in the room, especially from client experts. The non-profit shared that they only had a \$500 budget for stipends, meaning that each of the five client experts received a total of \$100. The client experts expressed that they would like more money to compensate them for their time because the staff were getting paid a lot more. They suggested a total of three 1-hour meetings (totaling \$33/hour), provided food, childcare, and transportation stipends for those who needed them. The staff agreed to those terms and apologized again for the low stipend.

Before ending the 2-hour meeting, the team (inclusive of the staff and client experts) had completed Stage 1 Parts 1-3 and spent time using the [Racial Equity Rubrics on Processes & Outcomes](#) to assess how well they promoted racial equity. They spoke about ways they could move closer to equity-driven/equity-centered processes and outcomes in the next stage. Clients and staff co-created the goals and agenda for the strategy meeting.

The co-facilitators worked together to send out meeting notes. A staff member completed all the administrative tasks and the client expert reviewed and approved everything before it went out to the team.

The team opened their second meeting with a reminder of the areas the team committed to growing and changing based on their Stage 1 Assessment of processes and outcomes. Staff and BIPOC experts took turns reviewing the meeting goals and agenda items. Since this meeting was dedicated to [Stage 2, "Co-strategize,"](#) they all worked to organize and describe which outcome measures and indicators they could access using the [disaggregated racial data chart](#). They realized they needed additional time before moving to the next section, "[Strategy Exploration](#)," so they agreed to dedicate the third meeting to completing Stage 2, Part 2 instead of *rushing*.

During the third meeting, the team (inclusive of BIPOC experts and non-profit staff) realized they needed an additional meeting to finalize the strategy in Stage 2 and assess how well each strategy promoted racial equity. Many client experts mentioned existing community-run programs that made a difference but were not *well funded*. These programs needed to be considered as a part of the team's final strategy before

moving forward in the decision-making process.

The team collectively decided to slow down the process and add an additional meeting. The non-profit was unable to pay clients for their time in the next two meetings. However, they still provided childcare, transportation stipends, and food. At the end of the next meeting, the team assessed their work.

The client experts and staff agreed to support a lesser known BIPOC initiative making culturally relevant efforts to build wealth in Black and Brown communities. The non-profit would fund the program and the BIPOC collective that created the strategy. In addition, funds would be provided to cover staff time for scaling up the strategy and seed money to pay \$5,000 to each client who participates in a four week Financial Freedom Cohort. The seed money could be used to invest in wealth building assets such as a business startup or toward the purchase of a home.

## Case Study Analysis

The research team used the [Racial Equity Toolkit](#) to assess how they applied racial equity in each stage. Staff empowered BIPOC stakeholders directly impacted by the racial wealth divide in each stage using a Power Respecting Model. Anti-racist group norms are not included in this RET. Consider: Despite thoroughly working through the RET there was still room to increase equity in both processes and outcomes. Compensation for BIPOC client experts was not paid at an expert rate like their staff counterparts. The terms of engagement that were co-created with client experts were violated multiple times by meeting longer than one hour at a time and having more than three meetings for the project without appropriate compensation. Correcting elements of the project could have yielded a higher equity rank.

**In the rubric on pg. 52-53, consider what actions were taken in the case study during each stage and ask the following questions:**

1. How did the team promote racial equity within their processes and outcomes?
2. How did the team in this case study NOT promote racial equity within their processes and outcomes?

# The Service Program: Rubrics

	Harmful	Maintains Current Inequities	Equity-Driven/ Equity-Centered
<b>Groundwork</b>			
<i>Process</i>			<p>The team used the Racial Equity Rubrics in each stage</p> <p>The internal team used the Racial Equity Tool from the beginning of the project</p> <p>The internal team was racially diverse</p> <p>BIPOC staff and those who have lived experience of the racial wealth divide had decision-making power in each stage</p>
<b>Stage 1: Align &amp; Co-Design</b>			
<i>Processes</i>			<p>The team used the Racial Equity Rubrics in each stage</p> <p>The internal team engaged with BIPOC experts to ensure they had equal decision-making power</p>
<i>Outcomes</i>			<p>The non-profit provided monetary and non-monetary forms of compensation to the BIPOC client experts</p> <p>BIPOC staff and those who have lived experience of the racial wealth divide had decision-making power in each stage</p>
<b>Stage 2: Co-Strategize</b>			
<i>Processes</i>		<p>Even though the team assessed themselves, they weren't responsive to honoring client experts' time, expertise, and requested rates of payment when the process changed to require more time</p>	<p>The team used the Racial Equity Rubrics in each stage</p> <p>The team was responsive to BIPOC clients in the co-creation of the program</p> <p>The team decided to slow down during Stage 2 and were flexible about extending their timeline</p> <p>BIPOC staff and those who have lived experience of the racial wealth divide had decision-making power in each stage</p>

<b>Stage 2: Co-Strategize (continued)</b>			
<u>Outcomes</u>			The non-profit provided monetary and non-monetary forms of compensation to the BIPOC client experts
<b>Stage 3: Co-Implement</b>			
<u>Processes</u>			The team used the Racial Equity Rubrics in each stage  The team worked with an existing BIPOC project to scale it up
<u>Outcomes</u>	The final program design is the same for all participants regardless of the unique history of racism each community of color experienced and the wealth inequities they experience relative to their white counterparts  The project outcomes (i.e. the amount of money each client was given to build wealth) are not proportional to the history of racism that has taken place	The non-profit only provided the client experts with \$33/hr, which is not an expert rate	The team worked with an existing BIPOC project to scale it up

