

A Preliminary Study of **Leadership Montgomery's Racial Equity Action Leadership Program**

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LEADERSHIP
MONTGOMERY
A Generation of Leadership

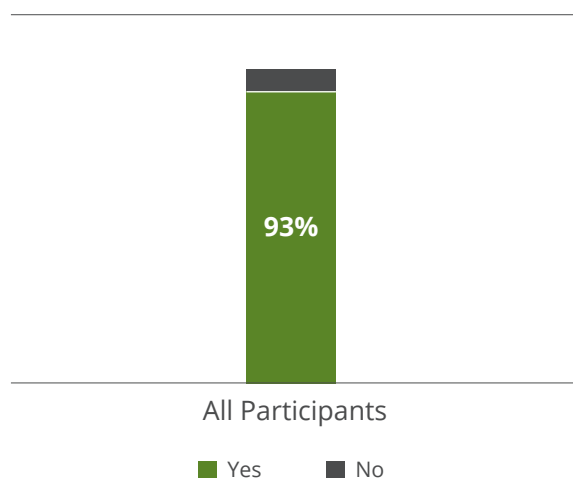


Executive Summary

Understanding the importance of equity within organizations, Leadership Montgomery (LM) created the Racial Equity Action Leadership (REAL) program in 2019. Recognizing the importance of this effort, LM contracted with Westat to design and implement a strategic study of the REAL program with the goal of sharing overarching outcomes of year 1 for the program, including identifying key takeaways. One overarching research question, how has the REAL program played a role in shaping racial equity mindsets, guided the study of the program. Critical race theory (CRT) was the most relevant conceptual framework chosen for the study because CRT places a problem in social, political, and historical contexts while considering issues of privilege, racism, and other forms of oppression. Drawing on both quantitative and qualitative methods, the study team conducted surveys, collected narratives, and embedded a participant observer for the entirety of the course. Additionally, individuals from one organization were case study participants with whom the study team conducted focus groups. Overall, race and racism and the knowledge and skills needed to implement change were foremost for the cohort. Understanding one's own identity and increased knowledge to foster communication

in the workplace were tools the cohort found useful. Next steps for the cohort include implementation of skills and tools provided with the understanding that effective change will take time, but the journey has begun.

Better understanding how racism operates has given me the tools to have discussions about race in my workplace.



Acknowledgement:

The study team would like to thank Leadership Montgomery and Wayfinding Partners for our partnership, as well as, Allison Henderson for introducing our organizations.



Introduction: Organizations Can Play a Role in Building Racial Equity

“No one is born hating another person because of the color of his skin, or his background, or his religion. People must learn to hate, and if they can learn to hate, they can be taught to love, for love comes more naturally to the human heart than its opposite.” — **Nelson Mandela**

Leadership Montgomery (LM) recognizes the vital role organizations and their people play in building equitable organizations, communities, and futures. With this recognition, LM created the Racial Equity Action Leadership (REAL) program to help organizations develop the necessary awareness, skills, and structures to identify and implement practices that lead to organizational changes that drive racially equitable outcomes (LM, 2020). The REAL program requires participants from organizations to participate in an 8-month course that includes eight sessions. At the end of the course, participants receive a certificate of completion.

Importantly, research magnifies the powerful role that racial equity training plays in helping organizations create more racially equitable cultures, as well as better overall organizational outcomes (Equity in the Center, 2018; Padamsee & Crowe, 2017; Suarez, 2018). Organizations that embed racial equity training show higher rates of employee satisfaction, retention, and innovation (Padamsee & Crowe, 2017). In addition, centering a race equity culture in an organization's ethos helps to dismantle racist structures to bridge opportunity gaps for People of Color (Equity in the Center, 2018). However, it is not easy for organizations to develop and implement a race equity culture; it takes strong commitment from organizational leadership that includes focused work, intent, and human and financial resources (Suarez, 2018).

With this understanding, LM intentionally designed its REAL program to engage participants in a uniquely structured series of courses that begins with helping participants develop a grounded historical understanding of racism. Throughout the course, participants learn to:

- Build relationships and empathy across race, culture, and power divides;
- Normalize conversations around race and how it impacts an organization's goals;
- Develop a vision for equity and create strategic messages to articulate the organization's equity values and goals;
- Use frameworks to identify and examine decisions, practices, and policies that are barriers to equitable outcomes;
- Develop a racial equity action plan; and
- Identify methods to evaluate success (LM, 2020).

Ultimately, the goal for participants completing the REAL program is for them to use those skills to help implement racially equitable practices in their organizations.

“[B]eing aware enables me to break the stereotypical definition of racism and stop the human behavior of ‘labeling’ of others.”
—**REAL participant**

Research Study: ▽

How Was REAL Implemented, and What Were the Outcomes?

To study the implementation and outcomes of the REAL program, LM teamed with Westat, a leading research and technical assistance (TA) organization, located in Rockville, Maryland. Westat worked in partnership with LM to design and implement a purposeful and strategic study of the REAL program, including providing key takeaways.

The study is framed using critical race theory (CRT), which centers the role of race and racism in interpreting the social world (Collins, 2000; Valdes, Culp, & Harris, 2002). CRT explains how the United States' social structure and institutions—including businesses, nonprofits, the school system, the legal system, the banking system, etc.—are rooted in a racist ideology that oppresses People of Color (Hooks, 1995; Matsuda, 1996; Solórzano & Yosso, 2001). CRT emphasizes the role of White privilege in the formation and day-to-day actions of U.S. institutions (Valdes et al., 2002). While CRT focuses on structural racism, it also connects macro structures to micro-level daily lived experiences (Collins, 2000). CRT emphasizes that people's lived experiences are central to understanding the social world. To understand how people experience the world, CRT suggests that researchers focus on the intersecting identities of people while recognizing that certain identities may play a larger role in people's daily experiences (Collins, 2000; Valdes et al., 2002). All identities, including racial identities, are socially constructed (Delgado & Stefancic, 2001). Therefore, race is not objective, inherent, or fixed, which allows for society to invent, manipulate, or retire various understandings of race when convenient (ibid). Importantly, CRT helps make sense of why, on average, People of Color experience lower social outcomes (education, health, career) than White people by magnifying the racism embedded in the U.S. structures and institutions (Hooks, 1995; Matsuda, 1996; Solórzano & Yosso, 2001).



With an understanding that LM's objective for the REAL course is to help participants gain the necessary awareness and skills to return to their organizations to implement practices that lead to racially equitable outcomes in their organizations, we framed an overarching research question, with sub-questions, to guide the study of the program:

- 1.** How has the REAL program played a role in shaping racial equity mindsets?
 - a.** How are participants operationalizing a racial equity mindset in their interpersonal lives?
 - b.** How are participants operationalizing a racial equity mindset in their community?
 - c.** How are participants operationalizing a racial equity mindset in their workplace?

Research Methods

With CRT as the framework, the study team made a conscious decision to frame the study using mixed methods—drawing on both quantitative and qualitative methods. Below we identify the specific methods. Our study began in October 2019 shortly after the course started and ended in May 2020 following the last class.

Quantitative Method

- Participant surveys

Qualitative Methods

- Personal narratives
- Case study focus groups
- Participant observations

The study team constructed the study instruments using CRT as the foundation. Participant surveys, personal narratives, and focus group questions explored race within contexts of personal, community, and workplace perspectives.

Cohort I

27 Participants

- 16 People of Color
- 11 White

Organizations range from health care to local government

- 11 case study participants from one organization

Following each of the eight sessions, participants were sent a short online survey linked to session objectives. Due to a scheduling conflict, participants completed the first survey later than anticipated but were able to complete that survey prior to the second session. The remaining online surveys were administered shortly after each corresponding session. In the last survey, participants answered additional questions to gauge how their participation in the program played a role in shaping their racial equity beliefs and future plans for incorporating what they learned in their organization. Participants were also given the opportunity to share short personal narratives regarding their racial equity mindset at the beginning and completion of the program.

Two additional methods offered the study team rich contextual information: (1) an organizational case study and (2) participant observation. The case study included individuals from a health organization, which had the largest number of participants in the cohort. Two members of the study team conducted focus groups with the organizational case study participants at two points in time—the beginning and end of the course—to gain an in-depth understanding of the REAL program from an organizational perspective. Case study participants were also asked to respond to short narrative prompts midway through the program to obtain their perspectives on racial equity within their communities and workplace, program expectations, and lessons learned to date. To lend authenticity to the overall study teams' interpretations, a study team member was a participant observer, participating in all sessions of the REAL program. Participants were made aware of the participant observer's role.

Analyses

Since the study used both quantitative and qualitative methods for data collection, the analyses reflected mixed-methods.

Quantitative analyses. Data were manually reviewed for errors, consistency, and usability prior to analyses. Given the limited number of participants (N=27), the study team found descriptive statistics most suitable. Survey analyses consisted of frequencies and cross-tabulations. Each survey was analyzed separately by calculating percentages for each question. Although the response rate for participants varied, the study team restricted analysis to when there were 10 or more participants responding. Data reflect the cohort, rather than individual participant journeys from the first to last session, but there are instances in which individual participant experiences are evident in the findings.

Qualitative analyses. For the qualitative analyses, placing value on participants' open-ended responses, narratives, and focus group contributions echoes tenets of CRT by providing context and lifting up participant voices. The study team developed a thematic code tree to code qualitative survey responses, narrative text, and focus groups. The study team coded the written text to further tell the story of how the program has shaped participants' racial equity mindsets. Through these methods, the study team's goal was to provide a rich picture and description of the cohort's journey through the course and the course's impact on their lives.

Participant Observer

The study team elected for a team member to be a participant observer for the REAL program. The team member participated in all sessions of the program and has provided a reflection below.

As a member of the evaluation team for the REAL program, I participated in all eight sessions.

The first six sessions provided an intense and memorable bonding experience for every participant. The relaxed and respectful environment made participants feel comfortable to open up about our identities and personal stories of racial discrimination. These stories made us realize that the path toward racial equity still has a long way to go, and that we are in this fight together.

Participants were aware of the racial diversity in the sessions and tried our best to sit next to people of difference race in small groups. While participants listened to other people's perspective respectfully during activities, we were unafraid to stir up disagreement and share our true thoughts. Even though sometimes the discussion became overly intense, I believe it is this sincere directness and passion for racial equity from participants of different races that made the experience at the REAL program truly memorable. I could feel a strong sense of community in our cohort.

Findings

A racial equity mindset allows people to understand patterns of inequity, critically reassess their lives personally, within their community, and in the workplace, and move toward solutions that encompass inclusive practices for People of Color who have been oppressed and under served. The findings below illustrate participants' personal opinions about their growth, and interactions within their workplace and communities at different points of time, throughout the REAL course. The findings

capture snapshots as participants obtained the skills needed to initiate racially equitable practices in their organizations. Session attendance and survey completion often varied. Survey findings represent responses when there are at least 10 participants. When possible, findings are presented by race when reporting criteria have been met. Otherwise, findings are provided in aggregate for all participants in the cohort.

Personal/Interpersonal

Race and racism were foremost on participants' minds, and they were eager to increase their knowledge and awareness to implement change.

Prior to beginning the REAL program, half of the participants had participated in racial equity training. Although the reasons for enrolling in this course were most often cited as being employer-directed (over 50 percent), participants overall wanted to learn skills to lead to organizational change. Participants expressed interest in:

- Learning more about race and power for themselves and their families,
- Learning ways to be anti-racist,
- Understanding how race and racial equity impacts their actions,
- Identifying inequitable practices, and
- Building awareness and to be transformative influences within their organizations and communities.

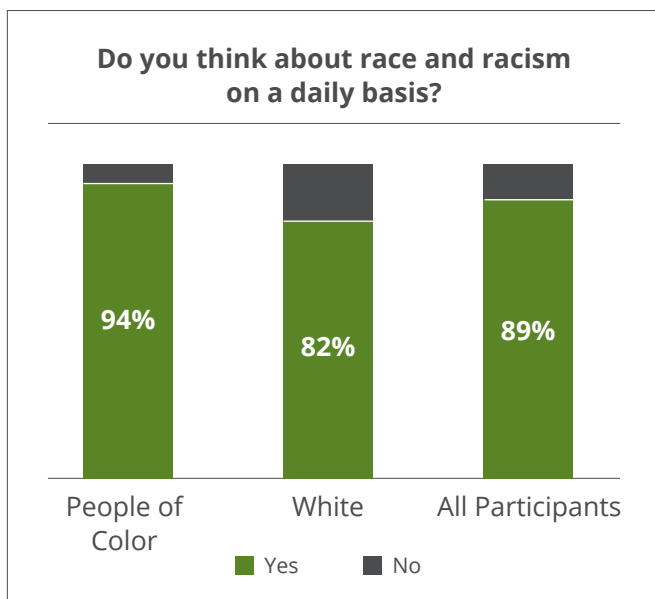
Close to 90 percent of participants indicated that they think about race and racism on a daily basis. When looking at this particular item by race, participants of color reported thinking about

race and racism more often. The importance of discussions and conversations about race and racism were evident from all participants, with over 96 percent of participants discussing race and racism with family and friends. Here again, participants of color reported a slightly larger percentage.

Racial Equity Definitions

Participants were asked to provide their definitions of racial equity. Prevalent themes were:

- Acknowledgment of the historical, institutional, and structural systems put in place to limit people based upon race;
- Societal conditions where race is not a determinant of success;
- Systems to advance all races; and
- Dismantlement of systemic racism.



As the sessions progressed, participants reported the REAL program increased their racial awareness. This awareness and increase in knowledge, they believe, will help them communicate better and improve the connection and support within their respective environments. Through their increased awareness, participants have been able to acknowledge privilege and biases and are willing to examine their own and others’ perspectives.

At the end of the program, participants mirrored early responses with high percentages of participants having conversations with their family and friends regarding racism.



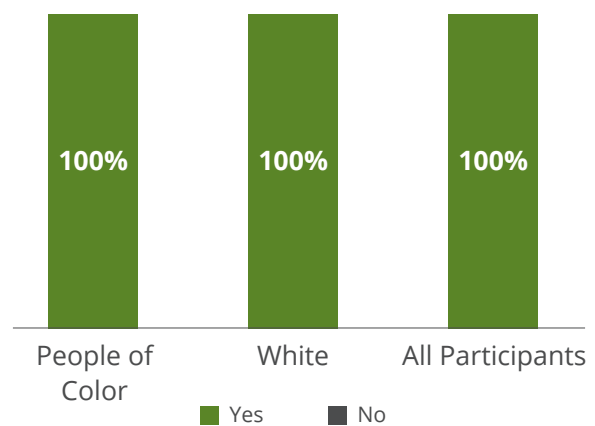
Community

Participants highlighted that racism contributes to social disparities in their own community and across communities, but also shared examples of racial inclusivity.

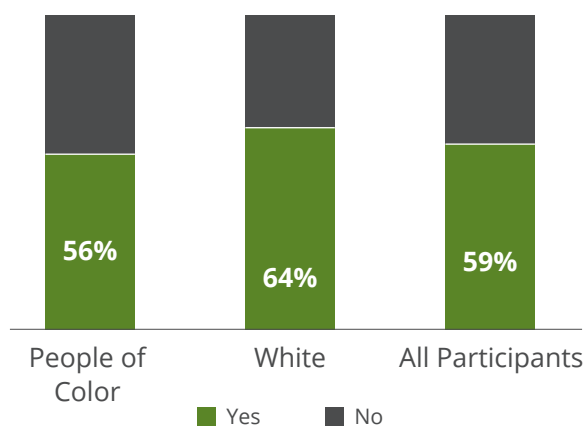
Community composition can at times shed light on racial equity. Participants believe racism serves as a major factor in the disparities on social outcomes (e.g., education, health, career) for People of Color. Within the communities in which they reside, participants' perceptions of cultural inclusivity for People of Color differed by race. Despite this, when asked, both racial groups responded similarly to the representation of People of Color in leadership positions in the communities in which they live.

"I plan to lift up the voices of the often marginalized and invisible constituents who have little access to the people in power."
-REAL participant

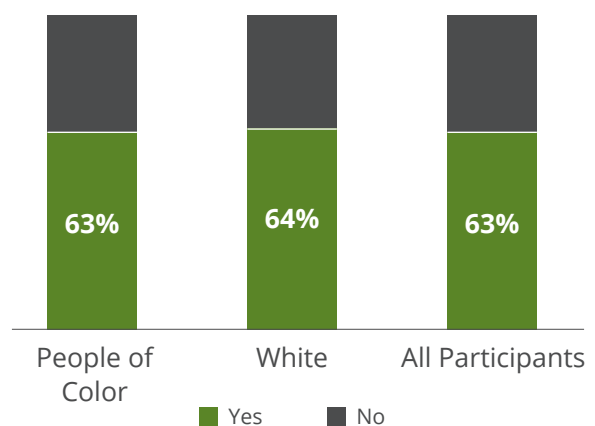
Do you think racism serves as a major factor in the disparities on social outcomes (e.g., education, health, career) for People of Color?



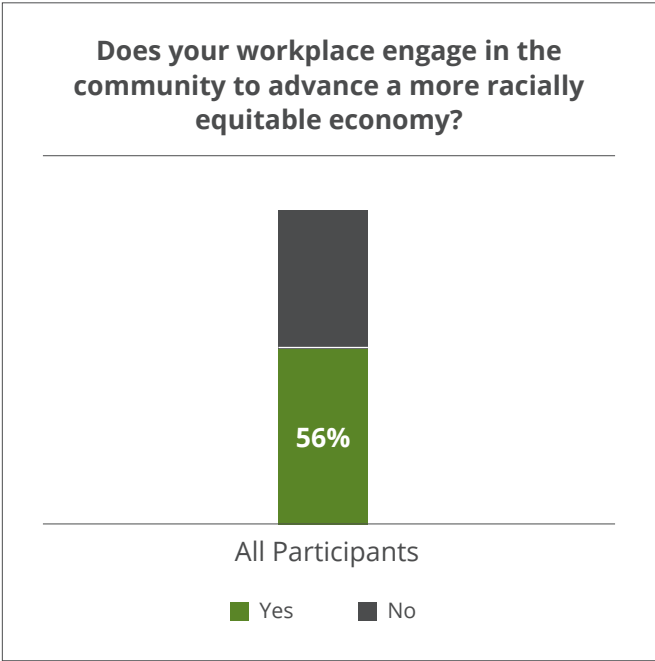
Do you think the community that you live in has an inclusive culture for People of Color?



Does the community you live in have People of Color represented in leadership positions?



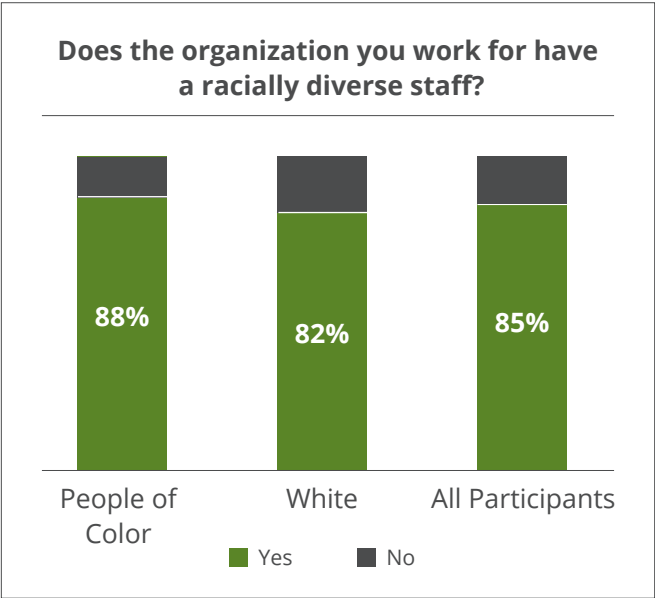
When it comes to workplace engagement with communities, 56 percent of participants revealed their workplace engaged in the community to advance a more racially equitable economy. When prompted for examples, participants cited donations, outreach activities, workshops, and advocacy most often.



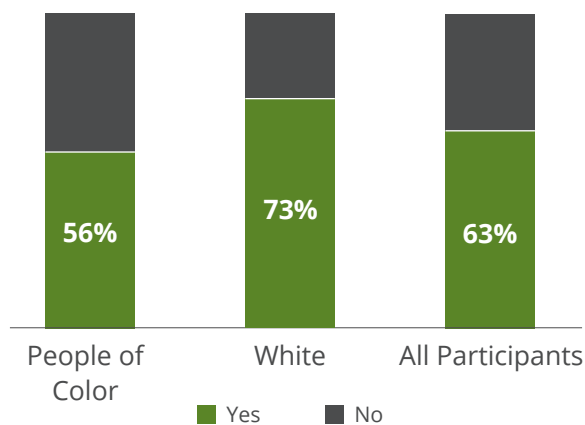
Workplace

Understanding one’s own identity and building an increased knowledge of racial equity better prepares participants to communicate in the workplace and creates systemic racial equity changes.

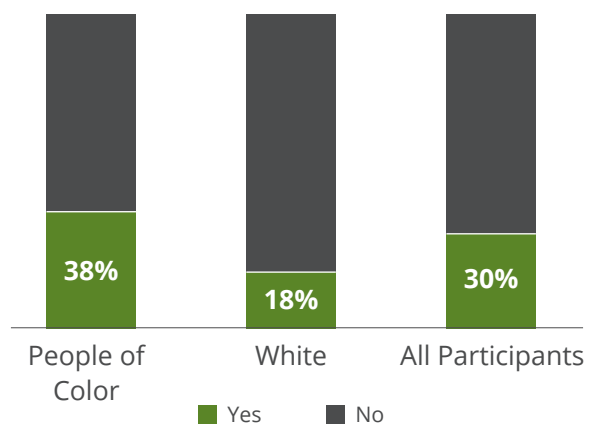
When it comes to fostering a racial equity mindset in the workplace, responses varied. Eighty-five percent of participants indicated their organizations have a racially diverse staff. In addition, 74 percent of participants indicated working in organizations with People of Color in leadership roles. Interestingly, only 63 percent of participants believe their organizations embrace cultural diversity. Notably, there is 15 percentage-point difference in perspective by race, with White participants agreeing to racial equity being embraced in the workplace. Possibly, the lack of racial equity training could offer some explanation as only 30 percent of participants indicated their workplace offers such training.



Does the organization you work for have a workplace culture that embraces racial equity?



Does the organization you work for require racial equity training for staff?

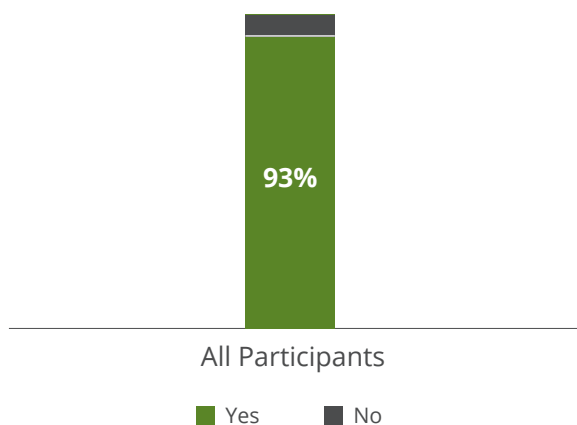


From an individual perspective, 92 percent of participants indicated that understanding their identity and better understanding how racism operates has given them the tools to communicate and have discussions about race within their workplace. Ninety-three percent of participants believe that by discussing how racism operates in the workplace, they are helping to create a more racially equitable environment at work. Participants plan to incorporate tools from the REAL program by engaging leadership, forming committees to

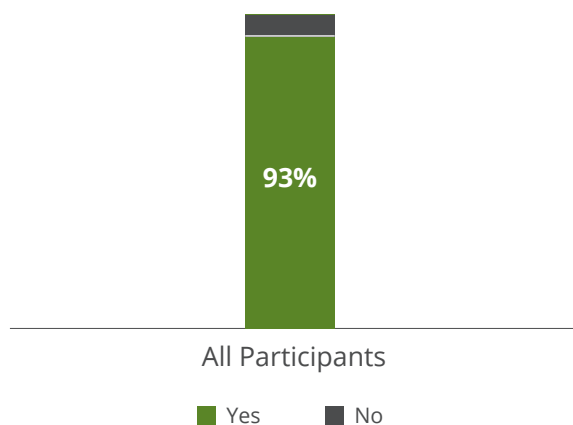
ensure fair practices, and addressing the presence of embedded racism in advocacy and community engagement.

**“The sessions helped me sharpen my ability to identify inequities.”
–REAL participant**

Understanding my identity helps me better communicate with my colleagues at work.



Better understanding how racism operates has given me the tools to have discussions about race in my workplace.



"This process has also enhanced my understanding of how each and every individual has the power to effectuate change within their respective work lives."

–REAL participant

By discussing how racism operates in the workplace I am helping to create a more racially equitable environment at work



All Participants

■ Yes ■ No

In terms of assessing the equity climate within their organizations, all participants indicated evaluation practices (surveys and focus groups) have yet to be conducted.

Does your organization survey its staff on the racial equity climate of the organization?



All Participants

■ Yes ■ No

Does your organization invite focus groups to better understand the racial equity climate of the organization?



All Participants

■ Yes ■ No

When considering efforts to apply what they learned, participants plan to suggest creation of an equity plan to reform policy, implementation of training and education, and creation of volunteer activities. Participants are also energized to facilitate conversations on racial equity and point out problematic practices within their organizations and bring about effective change.

Case Study: How the REAL Program Changed Participants' Outlooks on Systemic Racism

Eleven individuals from one organization agreed to be a part of a case study to examine the organizational impact of the REAL program.

Prior to participating in the REAL program, case study participants revealed that they previously viewed racism at an individualistic rather than systematic level. While they were aware of the phenomenon of racism happening in their lives, they attributed the cause of racism to individual “racist” persons rather than a problematic social and economic system.



Race and racism were agreed upon as sensitive topics at all levels, but the REAL program has “shaped” and “sharpened” the case study participants’ racial equity mindset. The program spurred case study participants to “question previous assumptions” and “take a different look” at communication patterns and policy implications within their organization.

With the onset of the pandemic, case study participants have become more aware of communities of color who are disproportionately affected and are in the process of garnering support for those who serve affected communities.

“I am also aware about the formidable task to make long-lasting change at the policy level for our organization.”
–Case study participant

When looking toward the future, participants are ready to be allies and champions with their senior leadership team and see the advantage of having a substantial number of organizational participants to help create organizational level change. They see their experience in the REAL program and benefit of the program as a mechanism to help their organization develop better programs to address racial equity issues within.

“Thinking about the ways we communicate using a racial equity lens has been really helpful.”
–Case study participant

Key Takeaways

The REAL program provided the cohort of participants an invaluable learning experience that helped shape their equity mindsets. In summary, the following themes emerge as key takeaways from the REAL program cohort 1 journey:

- Cohort participants were eager to obtain skills to improve racial equity within their organizations.
- It is important for cohort participants to understand who they are as individuals to feel grounded and initiate racial equity organizational change.
- Racial equity training may improve practices surrounding cultural inclusivity.
- To foster meaningful communication within organizations, it is important to have the right tools.
- Organizations' consideration of the racial equity climate can help inform planning and initiatives.
- Organizations must be committed to effectively making racial equity change over time to ensure sustainability.

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