REI Training & Consultation
Organizing and Hosting Racial Equity Institute Workshops

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Organizing and Hosting Racial Equity Institute Workshops

Following are important guidelines for organizations or communities that wish to engage racial equity training. REI Organizers are happy to assist in guiding you through the following process. Please read through the following and discuss with your team before emailing questions or requesting a call to discuss further.

Organizing and Hosting a Phase 1 Workshop

Step 1: Identify the Goals
- Consider why you want to bring a Racial Equity Workshop to your community / organization. What are your goals for the training?
- Though they can also serve as an early step towards building collaboration, workshops are most useful as an organizing tool or a piece of a larger commitment toward achieving racial equity in your organization.

Step 2: Identify Your Constituency - Who is the Workshop For?
- Would the workshop be specifically intended for members of your organization? If so, will participants be invited, urged, or required to attend?
- Would this workshop be a cooperative effort, involving two or more organizations, communities, agencies, etc.? If so, what segments of the community will you work to have represented? In most circumstances, REI recommends inclusion of a certain number of spaces for constituents or key partners.
- How will you ensure some racial diversity? Whenever possible, Racial Equity Workshops are done in racially mixed settings. Exceptions are made only in certain circumstances and with prior agreement with REI.

Step 3: Assessment of Interest
- Can you generate sufficient interest in the workshop in your organization or community? What is your strategy?
- Do you need to send a few members to a workshop in a different location to prepare them to help organize?

Step 4: Assess Organizational Finances and How You Register Your Participants
- Is your organization prepared to fund, raise funds, write a grant, or charge fees to cover costs associated with the workshop? Typically, organizations will cover costs with a combination of three funding sources: 1) the hosting organization covers all costs, 2) multiple groups come together to cover the costs, 3) community members are encouraged to register as individuals. Detailed workshop costs are below.
- Will you need to register participants? Collect and handle registration fees? Develop a plan for how you will do this?
**Workshop Costs**

**Workshop Fee:** The basic fee for a two-day Racial Equity Institute workshop is $12,000 plus travel expenses for 2-4 trainers for in person sessions. The in-person workshop can accommodate up to 40 participants, and the ideal size is 35-40. The virtual presentation is capped at a firm 30-35 participants with 2-3 trainers to maximize engagement.

**Training Site:** The in-person workshop requires a large meeting room that will hold 40-44 people comfortably seated in a circle. This includes the trainers.

**Meals:** We recommend that continental breakfasts, simple lunches, and snacks be provided at the site. Alternatively, participants may be given the opportunity to go out for lunch. Meal expenses can vary greatly depending upon the resources, needs and interests of the group. At a minimum, hosts should provide lots of water and perhaps some coffee and tea.

**Trainer Expenses:** A workshop requires a minimum of two, and preferably three trainers. REI will determine team composition based on the needs of your organization. Workshop hosts are responsible for covering trainer expenses including:

- Round-trip transportation to and from the workshop site: This includes airfare and ground transportation. We always work to keep this cost as low as possible.

- Lodging and other direct costs: Private hotel accommodations, food, and other reasonable expenses associated with travel. We will work within guidelines as required for state agencies, etc.

Typically, we make the arrangements for travel and hotel and ask the host to reimburse these costs (plus any meals and ground transportation) once the training is completed.

**Step 5: Set a Date**

- Request the dates you desire using the “Book REI Now” button on REI’s website. If you are requesting a 2-day workshop, you need to separately request both days. The second day is like a new appointment.
- In-person Workshops - Typical timing is 9:00AM – 5:00PM for two consecutive days.
  With a 9:00 start, we recommend that participants arrive between 8:30– 8:45AM for check in and any light breakfast or refreshment you want to provide. Our trainers also will arrive during this time and will want to connect with organizers around set-up for the workshop. The workshop starts at 9:00AM with breaks throughout the day. We usually break for lunch at approximately 12:30 PM each day. Lunch usually lasts an hour depending on your needs and the flow of the day. In addition, there is a mid-morning break and a mid-afternoon break.
- Virtual Workshops - Typical timing is 9:00AM – 5:00PM for two consecutive days with a one-hour lunch break and several short breaks to accommodate a pleasurable virtual experience. This workshop is conducted via Zoom with only one participant per registration. Multiple people cannot share a screen. REI will send the Zoom links to the training host 3-5 days before the training date.
Step 6: Contract and Cancellation Policy

- It is important that you read and refer to this document throughout your planning process. A confirmed workshop constitutes our contract with you according to the terms laid out in this Hosting Guide.
- Once we confirm a workshop, this date is reserved for you. If cancellation is a possibility, we ask that this occur more than three weeks before the scheduled workshop so that we will not have already booked trainers and incurred travel expenses. Workshops cancelled 14 days or less prior to your scheduled date will be invoiced for our expenses.

Step 7: Organize and Manage Registration

- Create a registration form, if needed. Please note that all announcements of the Racial Equity Workshop (press releases, ads, brochures, flyers, etc.) must be reviewed by REI staff *BEFORE* being released to the public.
- Supply REI with registration form, contact, and final location to post on REI website (optional).
- Invite and confirm participants. This is probably the most critical piece of hosting a workshop. REI can be available to provide limited coaching, support, and (if available) other local contacts as you and your team work to get financial and time commitments from potential participants.

Step 8: Complete the Workshop Checklist

Workshop Checklist- Two-day workshops

1) Be sure all participants are aware of the following:
   - The basic commitment they are making. All participants should be aware that we will be talking about how to address current day racial inequity and that *they are expected to stay for the entire workshop*.
   - The general workshop schedule (we don’t usually supply an agenda, just a general idea about start and stop times and that lunch and breaks will be provided.)
   - Participants should be prepared to be comfortable. Because room temperatures may vary, we advise people to always dress in layers. You may also want to let people know that may bring a cushion, a special chair, or any other items to facilitate their comfort or well-being during the two-days.
   - Participants should bring paper, pen, or other means to take notes.
   - Electronic devices are permitted for note taking and a brief “web search” activity. Otherwise we ask that people refrain from using such devices during the workshop. Breaks and lunch allow participants time for electronic communications.

2) For in-person sessions, prepare the space with the following:
   - Ability to set up ~40 chairs in a circle (as per your expected attendance), with an easel situated in between the trainers’ seats. There should be no desks or tables in front of the chairs. Workshop “alumni” (previous participants) are encouraged to come back. We ask that they be seated in an outer row, as listeners/observers and not active workshop participants (reserving this experience for first-timers).
   - Wheelchair accessibility
● Ability to maintain a comfortable temperature.
● Space to post a dozen or more newsprint sheets from the easel pad around the room (see below)
● Limited noise distractions (e.g., phones, fans, kitchens, traffic, music, other activities).
● Audio-visual capability: we need a projector with audio capability (and internet access) for a documentary clip

3) Have the following supplies on hand:
   ● Full-size (25” x 30”) Post-It Easel Pad (or non-sticky easel pad and a roll of masking tape).
   ● A sturdy easel (to hold the easel pad)
   ● Large markers in multiple colors including black, red, blue, and others. We prefer the chiseled type (like Sharpies/chiseled). Be sure to test that they work).
   ● Nametags.
   ● Sign-in sheet (optional, for your use only)

4) Prepare volunteers or staff to manage additional tasks and supplies (as needed). Other tasks might include:
   ● Representative from host site to introduce the workshop and trainers
   ● Registration and check-in
   ● Meal, coffee, and snack service
   ● Volunteer host(s) who can troubleshoot any problems that arise during the training
   ● Map/directions for participants and trainers
   ● Accommodations for participants who are traveling (including parking)
   ● Special needs accommodations
   ● Childcare (optional)

5) After the workshop
We will send you a copy of post-workshop materials at the same time we send the invoice. It is your responsibility to distribute these to your participants.

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Hosting a Groundwater Approach Presentation

**Step 1: Identify the Goals**

● Consider your goals in bringing a Groundwater presentation to your community / organization.

**Step 2: Identify the Format of the Presentation**

● Together with the Racial Equity Institute (REI), we will discuss how to format the presentation. How much time will you commit? Who will be present? Will it be part of a larger retreat or set of discussions?
● In this lively presentation, REI organizers use stories and data to present an argument that racism is fundamentally structural in nature. By examining characteristics of modern-day racial inequity, the presentation introduces participants to an analysis that most find immediately helpful and relevant. The Groundwater Presentation dovetails with REI’s phase I workshop and is recommended as an introduction or follow-up to a full two-day workshop.

● This workshop can be conducted in-person or virtually in one of the following formats:
  - **Groundwater Basic**
    - Half day presentation (3 hours) with several breaks
  - **Groundwater Plus**
    - One day presentation (4.5 -5.5 hours) with several breaks including an additional 1-hour break
    - Includes the Basic presentation information with an additional 1 ½ - 2 hours on system-related information as well as a facilitated dialogue
  - **Groundwater Plus Extended**
    - One and ½ day presentation
    - Includes the Groundwater Plus presentation information with additional time for in-depth case study reviews

The in-person workshop can be limited to a core group of participants or expanded to include many stakeholders and requires a projector and a screen for PowerPoint. The virtual workshop is conducted via Zoom, and participant count is capped at a firm 100 per presentation for maximum engagement. Only one participant per registration. Multiple people cannot share a screen. REI will send the Zoom links to the training host 3-5 days before the training date.

**Step 3: Confirm Pricing and Schedule**

**Workshop Fees:**
- **Groundwater Basic** - $5000 plus travel expenses for in-person workshops.
- **Groundwater Plus** - $6500 plus travel expenses for in-person workshops.
- **Groundwater Plus Extended** - $8000 plus travel expenses for in-person workshops.

A presentation requires a minimum of two trainers. REI will determine team composition based on the needs of your organization. Workshop hosts are responsible for covering trainer expenses.

**Step 4: Manage Registration and Finalize Logistics**

- Registration, logistics, and supplies needed will vary depending on the particular engagement.
- In the case that there is space for additional participants, please prepare to share relevant flyers and registration material with REI, and we will share with additional partners that might benefit from participating.

**Step 5: Complete the Workshop Checklist**

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**Workshop Checklist- Groundwater**

1) Be sure all participants are aware of the following:
   - The basic commitment they are making. All participants should be aware that we will be talking about
how to address current day racial inequity, and that they are expected to stay for the entire workshop.
● The workshop schedule.
● Participants should be prepared to be comfortable. Because room temperatures may vary, we advise people to dress in layers. You may also want to let people know that may bring a cushion, a special chair, or any other items to facilitate their comfort or well-being during the workshop. (Because the Groundwater is a shorter workshop, seat comfort is generally less of an issue.)
● Participants may want to bring paper, pen, or other means to take notes.

2) Prepare the space for in person workshops with the following:
   ● Groundwater trainings can accommodate a variety of seating arrangements, depending on the number of participants. Smaller numbers (45 or fewer) can be seated in a circle or at tables. Larger numbers can be seated theater-style or at tables in a large space.
   ● Participants need to be able to view a PowerPoint presentation.

3) Prepare the Following Equipment and Supplies
   ● Audio-visual: Presenters need a projector and screen for a slide presentation. Arrangements can be made ahead of time regarding laptop or thumb drive. Audio is not necessary.
   ● Registration and Check-in: Depending on your circumstances you may need check-in sheets, capability to receive participant payments, and name tags.
   ● Food: We will take a break in the middle of the presentation. Host may decide whether you want to offer refreshments for participants during the workshop.
Organizing and Hosting a Latino Challenges Workshop

Key items to consider when organizing and hosting a Latino Challenges workshop:

1. **Your Group’s Interest**
   a. Why does your group, organization or community **want or need** a *Latino Challenges* workshop? What specific issues, concerns, events or situations motivate your interest or drive your need at this given time?
   b. What do you hope to gain from this workshop?
   c. Can your group organize a team of people who will engage potential participants and mobilize resources needed for this workshop?

2. **The Participants**
   a. Who are the intended participants of this workshop: staff, community groups, agency gatekeepers, etc.? What is the link, relationship, common interest, or shared experience that would bring people together for this workshop?
   b. Is this workshop intended for an English-dominant multiracial audience; a Spanish-dominant Latinx-only group, or both, separately? [For our rationale for separate workshops, please read “The Oppressive Underpinnings of Language Interpretation.”]
   c. Is there adequate representation of the social identity diversity (race, gender, class, nationality, etc.) among anticipated workshop participants? If not, what would you need to do to ensure it?

3. **Estimate your costs**
   i. REI Workshop fee ($11,000) plus travel expenses for trainers’ travel expenses (air & ground), lodging [2 trainers; 2-3 nights], and meals
   ii. Costs of refreshments or meals provided to workshop participants
   iii. Possible space rental costs
   iv. Materials and supplies (flip chart, markers, masking tape, nametags, etc.)
   v. Other optional costs (childcare, flowers, etc.)

   a. **Consider your sources of income**
      i. Registration fees
      ii. Professional development funds
      iii. Gifts & Donations
      iv. Fundraising events [including participant-led activities]
      v. Grants

4. **Formal Agreement/Mutual Commitments**
   a. “Book REI Now” button
   b. Sign agreement
   c. Deposit (20% — due 8 weeks prior to workshop)
   d. Balance (due upon completion of workshop)
5. **Outreach/Organizing**
   a. Prepare and/or disseminate outreach materials that clearly describe the workshop’s purpose, content, process, and schedule. [Locally produced outreach materials will need to be previously approved by c-Integral.] Clearly convey the time commitment expected from participants.
   b. Strategically circulate within your professional networks, community circles, social media, and/or local press, as appropriate for your group and organizing purposes.
   c. Remember the power of personal relationships: direct phone calls, face-to-face meetings, group presentations. Trainer(s) may be available for group presentations and other outreach or fundraising activities as availability and resources allow.

6. **Training Site**
   *Space must be large enough to comfortably accommodate 30-40 people sitting in a single, unobstructed circle — no tables, desks, columns, etc., in the middle.*
   a. Comfortable seating. [May ask participants to bring cushions.]
   b. Environment free of external interruptions (noise, phones, traffic, music, other people, etc.)
   c. Wall space (or alternative vertical surfaces) to hang multiple newsprints.
   d. Other tables or spaces for resource sharing.
   e. Good lighting and mic-free acoustics; comfortable room temperature.
   f. Wheelchair accessible.
   g. Adequate number of bathrooms for group size.
   h. Childcare area (as necessary).
   i. General good vibes!!!

7. **Materials & Equipment**
   a. Projector (high resolution), screen and sound system – or large screen HDTV
   b. Easel
   c. Newsprint
   d. Markers
   e. Masking tape
   f. Name tags, paper, and pens (for participants)

8. **Other Logistics**
   a. Local contact person(s) — who(m) participants may reach
   b. Registration and payment
   c. Sign-in process (on-site)
   d. Meals, refreshments, and snacks — and plenty of water!
   e. Flowers and live plants are always nice!
   f. Trainer transportation to site
   g. Childcare, if desired
   h. Maps/directions and other communications with participants
   i. Site housekeeping
   j. Post-workshop feedback, de-brief & follow-up
Organizing and Hosting a Youth Workshop

Step 1: Identify the Goals
- Consider why you want to bring a Racial Equity Workshop to your community / organization. What are your goals for the training?
- Though they can also serve as an early step towards building collaboration, workshops are most useful as an organizing tool or a piece of a larger commitment toward achieving racial equity in your organization.

Step 2: Identify Your Constituency - Who is the Workshop For?
- Would the workshop be specifically intended for members of your organization? If so, will participants be invited, urged, or required to attend?
- Would this workshop be a cooperative effort, involving two or more organizations, communities, agencies, etc.? If so, what segments of the community will you work to have represented? In most circumstances, REI recommends inclusion of a certain number of spaces for constituents or key partners.
- How will you ensure some racial diversity? Whenever possible, Racial Equity Workshops are done in racially mixed settings. Exceptions are made only in certain circumstances and with prior agreement with REI.

Step 3: Assessment of Interest
- Can you generate sufficient interest in the workshop in your organization or community? What is your strategy?
- Do you need to send a few members to a workshop in a different location to prepare them to help organize?

Step 4: Assess Organizational Finances and How You Register Your Participants
- Is your organization prepared to fund, raise funds, write a grant, or charge fees to cover costs associated with the workshop? Typically, organizations will cover costs with a combination of three funding sources: 1) the hosting organization covers all costs, 2) multiple groups come together to cover the costs, 3) community members are encouraged to register as individuals. Detailed workshop costs are below.
- Will you need to register participants? Collect and handle registration fees? Develop a plan for how you will do this?

Workshop Costs

**Workshop Fee:** The basic fee for a two-day Racial Equity Institute workshop is $11,000 plus travel expenses for 2-3 trainers. The workshop can accommodate up to 40 participants. Ideal size is 35-40.

**Training Site:** This workshop requires a large meeting room that will hold 40-45 people comfortably seated in a circle. This includes the trainers.
Meals: We recommend that continental breakfasts, simple lunches, and snacks be provided at the site. Alternatively, participants may be given the opportunity to go out for lunch. Meal expenses can vary greatly depending upon the resources, needs and interests of the group. At a minimum, hosts should provide lots of water and perhaps some coffee and tea.

Trainer Expenses: A workshop requires a minimum of two, and preferably three trainers. REI will determine team composition based on the needs of your organization. Workshop hosts are responsible for covering trainer expenses including:

- Round-trip transportation to and from the workshop site: This includes airfare and ground transportation. We always work to keep this cost as low as possible.

- Lodging and other direct costs: Private hotel accommodations, food, and other reasonable expenses associated with travel. We will work within guidelines as required for state agencies, etc.

Typically, we make the arrangements for travel and hotel and ask the host to reimburse these costs (plus any meals and ground transportation) once the training is completed.

Step 5: Set a Date

- Request the dates you desire using the “Book REI Now” button on REI’s website. If you are requesting a 2-day workshop, you need to separately request both days. The second day is like a new appointment.
- Typical Timing is 9:00 – 5:00PM for two consecutive days.

With a 9:00 start, we recommend that participants arrive between 8:30AM – 8:45 for check in and any light breakfast or refreshment you want to provide. Our trainers also will arrive during this time and will want to connect with organizers around set-up for the workshop. The workshop starts at 9:00AM with breaks throughout the day. We usually break for lunch at approximately 12:30 PM each day. Lunch usually lasts an hour depending on your needs and the flow of the day. In addition, there is a mid-morning break and a mid-afternoon break.

Step 6: Contract and Cancellation Policy

- It is important that you read and refer to this document throughout your planning process. A confirmed workshop constitutes our contract with you according to the terms laid out in this Hosting Guide.
- Once we confirm a workshop, this date is reserved for you. If cancellation is a possibility, we ask that this occur more than two weeks before the scheduled workshop so that we will not have already booked trainers and incurred travel expenses. Workshops cancelled 14 days or less prior to your scheduled date will be invoiced for our expenses.

Step 7: Organize and Manage Registration

- Create a registration form, if needed. Please note that all announcements of the Racial Equity Workshop (press releases, ads, brochures, flyers, etc.) must be reviewed by REI staff BEFORE being released to the public.
● Supply REI with registration form, contact, and final location to post on REI website (optional).
● Invite and confirm participants. This is probably the most critical piece of hosting a workshop. REI can be available to provide limited coaching, support, and (if available) other local contacts as you and your team work to get financial and time commitments from potential participants.

Step 8: Complete the Workshop Checklist

Workshop Checklist- Two-day workshops

1) Be sure all participants are aware of the following:
   ● The basic commitment they are making. All participants should be aware that we will be talking about how to address current day racial inequity, and that they are expected to stay for the entire workshop.
   ● The general workshop schedule (we don’t supply an agenda, just a general idea about start and stop times and that lunch and breaks will be provided.)
   ● Participants should be prepared to be comfortable. Because room temperatures may vary, we advise people to always dress in layers. You may also want to let people know that may bring a cushion, a special chair, or any other items to facilitate their comfort or well-being during the two-days.
   ● Participants should bring paper, pen, or other means to take notes.
   ● Electronic devices are permitted for note taking and a brief “web search” activity. Otherwise we ask that people refrain from using such devices during the workshop. Breaks and lunch allow participants time for electronic communications.

2) Prepare the space with the following:
   ● Ability to set up ~40 chairs in a circle (as per your expected attendance), with an easel in between 2-3 trainer seats on either side of the easel. There should be no desks or tables in front of the chairs. Workshop “alumni” (previous participants) are encouraged to come back. We ask that they be seated in an outer row, as observers and not active workshop participants (reserving this experience for first timers).
   ● The space should be wheelchair accessible.
   ● Ability to maintain a comfortable temperature.
   ● Space to post a dozen or more newsprint sheets from the easel pad (see below)
   ● Limited noise distractions (e.g. phones, fans, kitchens, traffic, music, other activities).
   ● Audio-visual capability: the training requires ability to stream video and audio (i.e., we need a projector, audio, and internet access.)

3) Have the following supplies on hand:
   ● Full-size (25” x 30”) Post-It Easel Pad (or non-sticky easel pad and a roll of masking tape).
   ● A sturdy easel (to hold the easel pad)
   ● Large markers in multiple colors including black, red, blue, and others. We prefer the chiseled type (like Sharpies/chiseled). Be sure to test that they work.
   ● Nametags.
• Sign-in sheet (optional, for your use only)

4) Prepare volunteers or staff to manage additional tasks and supplies (as needed). Other tasks might include:
  • Representative from host site to introduce the workshop and trainers
  • Registration and check-in
  • Meal, coffee, and snack service
  • Volunteer host(s) who can troubleshoot any problems that arise during the training
  • Map/directions for participants and trainers
  • Accommodations for participants who are traveling (including parking)
  • Special needs accommodations
  • Childcare (optional)

5) After the workshop
We will send you a copy of post-workshop materials at the same time we send the invoice. It is your responsibility to distribute these to your participants.