



PORTLAND REVELS

INCLUSION DIVERSITY EQUITY AND ACCESSIBILITY (IDEA) CONSULTATION REPORT: INTENTIONAL ADDRESSING OF IMMEDIATE AND LONG-TERM (5-YEAR) IDEA COMMITMENTS

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Executive Summary



Portland Revels IDEA Consultation Report: Intentional Addressing of Immediate and Long-Term (5-Year) IDEA Commitments

Portland Revels is an organization deeply rooted in fostering cultural exploration, creating community connections, and honoring a multitude of cultural traditions. This report provides an overview of the organization's intentional inclusion, diversity, equity, and accessibility (IDEA) consultation journey to assess its internal climate and inform a short-term and long-term vision for Portland Revels.

Portland Revels contracted with Dr. Eleanor Gil-Kashiwabara (Luminosa Psychological Services) for consultation in response to priorities that emerged out of staff and Board discussion during the Spring 2022 Annual Staff and Board meeting, including discussion about the We See You White American Theatre (2020) document. The consulting scope of work was developed through extensive and thoughtful discussion between Dr. Gil-Kashiwabara and Portland Revels leadership around the goals for the consultation, existing organizational strengths and IDEA work. Important considerations included current areas of readiness within the organization as well as the external impact of doing this work internally as an arts organization.

Initial discussions with leadership identified the following areas of focus (deliverables) for the consultation:

1. Abbreviated-Scope Needs Assessment with a Short-Term and Long-Term (Five-Year) IDEA Plan.
2. IDEA Training Series for Portland Revels Board and Staff.

The Abbreviated-Scope Needs Assessment was designed to provide a high quality and efficient baseline assessment to inform the short- and long-term IDEA plan within the budget constraints of a smaller arts organization. This involved examining both existing data and documents and collecting new information via confidential interviews with Portland Revels community members as well as through pre- and post-training surveys from the IDEA Training Series. A crucial stakeholder in the project was the Portland Revels Consultative Resource Team (CRT), which provided feedback, insight, and collaboration to Dr. Gil-Kashiwabara regularly throughout each stage of the consultative process.

Executive Summary (cont.)



Analysis of existing data and documents was completed using a multi-tiered approach. The first level of analysis involved summarizing the data trends/themes for each individual data source. The second level involved looking at themes and trends across data sources to create an integrated picture of the IDEA baseline and identified priorities in order to create the recommended Portland Revels IDEA Plan. In both levels of data analysis, analysis that involved coding data into themes was conducted by two members of the consultation team in order to achieve consistency in theme development and interpretation, and to obtain a high level of accuracy. Use of multiple coders reduces subjectivity or bias and improves the reliability and trustworthiness of the data analysis.

Themes from the Needs Assessment highlighted the organization's existing strengths and values for community and inclusion, as well as the opportunity to examine existing programming and practices to take intentional steps toward the organization's identified IDEA priorities. These priorities emphasized an increased commitment to diversity and anti-racism, addressing structural barriers within its work, and fostering a safe and anti-oppressive environment for communities of color.

Four common themes across the data sources included:

1. Racial/Ethnic Diversity: A need for diverse audience and membership inclusivity related to race/ethnicity and the global majority.
2. Intentional Community Outreach: A need for community outreach to improve access for children and families, and those from low-income backgrounds and/or intersecting minoritized identities.
3. Existing Strengths: Important strengths that can benefit the Portland Revels IDEA work include the high-quality music, set, dance, and other performance aspects that blend the "new" with "traditional" Revels performance themes, and the felt sense of community strength and belonging.
4. Safe, Anti-Racist Environment for BIPOC: A need to create a safe, anti-racist environment for BIPOC (Black, Indigenous, People of Color) via the hiring and engagement of a diverse Board and staff, the establishment and enforcement of an accountability process for anti-racism principles (including the creation of a code of conduct) as well as ongoing IDEA education within the organization.

Executive Summary (cont.)



The Portland Revels Recommended IDEA Plan responds to these themes and is grounded in an anti-racist and trauma-informed lens, with an emphasis on dismantling white supremacy culture. This grounding will support ongoing IDEA work from an intersectional framework as well as future IDEA efforts focused on other systems of oppression. With this anchoring, the Recommended IDEA Plan includes steps that the Portland Revels can take over the next five years in support of the priorities identified in the Needs Assessment to build on the community's strengths in order to address gaps and opportunities that emerged through the overall IDEA consultation. The Recommended IDEA Plan is not a linear or static roadmap but rather a compass that will provide guidance for the Portland Revels as the organization continues to move forward in its IDEA journey.

The Recommended IDEA Plan outlined in this report includes key short-term and long-term priorities, context and important considerations for each priority, potential actions to be taken in support of the priority, and example indicators of progress. Key priorities included in the plan are outlined below.

Immediate and Short-Term Priorities (0-3 Years)

1. **Intentional Community Engagement Plan.** Develop and implement an intentional, culturally appropriate and collaborative plan to partner with a specific community (focus: children/families/school intersecting with race/ethnicity and low income)
2. **Diversify Inside the Organization and Develop a Safe and Inclusive Organizational Culture.** Cultivate a more diverse board, staff, and performers, and ensure that staff hire(s), contractors, volunteers, and vendors reflect a commitment to the IDEA mission.
3. **Yearly IDEA trainings for Board and staff.**

Long-Term Priorities and Goals (3-5 Years)

1. **Create an IDEA Sustainability plan.**

The one primary long-term priority outlined in the plan is multi-layered and involves attention to timeline, process, ongoing feedback, and reevaluation. Meaningful progress over time will require Portland Revels to apply a decolonial, anti-racist, and racial trauma-informed lens to continually evaluate what is working and what is not, and to adjust strategic plans in support of IDEA.

Finally, this report concludes with recommended resources to support the Portland Revels IDEA journey, including example tools for ongoing assessment of the organization's culture and progress toward IDEA goals.

INTRODUCTION

Portland Revels is one of eight organizations in North America affiliated contractually and artistically with Revels, Inc. Each Revels group has its own non-profit status. The origins and deep-rooted tradition of the Revels both nationwide and including Portland Revels is the Midwinter Revels, which is a holiday show that is intergenerational and heavily based in European traditions. While the Midwinter Revels is not faith-based, it is steeped in traditions of song, dance, poetry and performance that have historically been culturally Western. For example, most Midwinter Revels performances include a mummer's play, the performance of Dona Nobis Pacem (a short prayer for peace originally from Latin mass), the reciting of the poem The Shortest Day and the Abbots Bromley Horn Dance which originated in Staffordshire, England. These are elements that the Revels audience have come to expect in every Midwinter Revels production.

In addition to Midwinter Revels, Portland Revels has programming throughout the year, all with the aim of building community and connection between their performers and audiences through music, singing and storytelling. These additional programs are Spring Revels, Children's Revels and Pub Sings.

The core values of Revels nationwide¹ are:

- Practicing the art of participation. This refers to the artistic process that dissolves barriers between professionals, amateurs and audiences, highlighting an operational style that encourages volunteerism and inclusivity. People of all ages and abilities sing, dance and are part of the Revels experience together.
- Fostering cultural exploration. This refers to the curiosity and respect that is engaged during the search for diverse cultural global expressions. The intention is to affirm authentic rituals and traditions-and tradition bearers-while bringing together different cultures and genres in new ways.
- Creating connection. A sense of community emerges by connecting through art.
- Being stewards of tradition. The passing down of stories, dances and music from generation to generation hold collective wisdom that highlight the past and inform the future.
- Fulfilling the human need for celebration. Every season is celebrated with the annual progression of the calendar.

1. <https://revels.org/about/>

INTRODUCTION

With regard to all of the Portland Revels programming, the commitment to honor a multitude of cultures and backgrounds is maintained. The national Revels organization emphasizes a stated commitment to equity, diversity and inclusion, noting that Revels productions engage in honoring and upholding the differences that make individuals and cultures truly unique while reminding us of the shared humanity that connects us all.

Portland Revels has extended their stated commitment to include an anti-racist position, specifically ***“...being people who promote active anti-racist measures on interpersonal, societal, and institutional levels, within our organization and elsewhere.”***²

The commitment to diversity and anti-racism, as well as stated values such as fostering cultural exploration and creating connection, are important foundations for the IDEA journey of the Portland Revels organization. While these commitments are deeply valued, some members in the broader Portland Revels community, have wondered or expressed worry that a change in programming aligned with the IDEA journey will create distance from the Northern European roots of the Revels tradition, particularly pertaining to the Midwinter Revels. In response to this Portland Revels community tension, the IDEA consultation of Portland Revels, which is focused on creating an intentional path for the IDEA journey, includes the exploration of the question of how to open up the tradition of Revels to be more expansive while also maintaining the feel of ***“...what it has always been”*** and exploring the question of ***“Is there a balance?”***³ What does or could this mean and is this possible or necessary?

2. <https://portlandrevels.org/about/#community>

3. Excerpts of quote from a confidential communication between the consultant and a Portland Revels community member. Similar sentiments were expressed by multiple Portland Revels community members.



INTRODUCTION

Background: Portland Revels IDEA Consultation

In July 2022, Portland Revels Executive Director, Lauren Bloom Hanover, connected with Dr. Eleanor Gil-Kashiwabara of Luminosa Psychological Services to inquire about the possibility of providing Inclusion, Diversity, Equity and Accessibility (IDEA) consultation and training services to the organization. During their Annual Staff and Leadership meeting, a number of next steps had been identified based on the issues and themes raised, the first being to engage a consultant to support the Portland Revels IDEA journey. These next steps, along with selected demands from **We See You White American Theatre (2020)**⁴, comprise the intended basis of the Portland Revels IDEA plan. The Spring 2022 Annual Board and Staff Meeting notes highlighted the expectations for the plan, specifically to outline high level goals, create benchmarks for the shorter and longer term, along with specific tasks and actions to move Portland Revels towards achieving those goals and benchmarks.

Actions identified by Portland Revels staff during the Spring 2022 Annual Meeting as important next steps included:

- 1 Engage consultant for implicit bias training
- 2 Engage with folks in the community to get feedback on their experience
- 3 Engage folks in DEI work that will do the following:
 - Anti-Racist: definition for Revels
 - Develop anti-racist commitment statement
 - Develop land acknowledgement statement
 - Develop equity lens
 - Develop partnership evaluation tool
 - Set goals for reflecting PDX in 3-5 years while also aiming higher (global majority)



⁴ Refer to <https://www.weseeyouwat.com/> for the full letter and list of demands. For the remainder of this report, the aforementioned letter will be referred to as We See You W.A.T.

INTRODUCTION

In addition, during the 2022 Annual Board and Staff Meeting, Portland Revels staff and leadership reviewed the demands from **We See You W.A.T.** and identified four demands that Portland Revels could begin to work on immediately. The next steps noted on Page 8 were in part informed by the **We See You W.A.T.** demands. In addition to identifying the demands of focus, the Portland Revels staff and leadership identified action items for Portland Revels in order to meet each demand.

The selected four demands with identified example action items are:

- 1 **Create a safe/antiracist environment for BIPOC people**
 - Dismantle structural barriers
 - Define anti-racist for Revels
- 2 **Board/leadership should seek out those who are different from themselves & value their differences**
 - Be willing to modify cultural expectations of what board membership and service mean
 - Intentionally engage with folks to find out about their experience at Revels
- 3 **Enforce accountability to anti-racism**
 - Transparency about our commitment and our progress – on website, internal reporting
 - Apply equity lens to choices and program development
- 4 **Boards must overhaul their membership to be more inclusive and to better reflect the global majority**
 - Goal of reflecting Portland while aiming higher



INTRODUCTION

Lauren Bloom Hanover shared the next steps and selected demands of focus, along with the hope and intent for the IDEA consultation with Dr. Gil-Kashiwabara during their initial July 2022 meeting. During this preliminary meeting, the organization-consultant fit was explored with a focus on consultant approach and organizational needs and requests for the consultancy. Once the fit was determined, the idea of combining next steps #1 and #2 (training and obtaining feedback from the community) into the consultation scope was explored. The project scope (see next section) was developed out of extensive and thoughtful discussion between Dr. Gil-Kashiwabara and Portland Revels leadership around the goals for the consultation, the importance of building on existing organizational strengths and IDEA work that had already begun within the organization, as well as consideration of the current areas of readiness within the organization.

It is important to note that prior to establishing the consultation agreement, the Portland Revels had already embarked on a number of next step actions including the development of Land Acknowledgement and anti-racism commitment statements, as well as taking steps to develop a partnership evaluation tool. The momentum of work that was already underway, along with a stated commitment to anti-racism and values around connection and cultural exploration are all baseline strengths that support Portland Revels in their initial IDEA steps and ongoing journey.

Portland Revels Land Acknowledgement

Our community owes its existence and vitality to those who came before us, who stewarded the land through the changing seasons for millennia and whose lives created the story that has led us to this moment.

We recognize that the City of Portland sits on the unceded traditional village sites of the Multnomah, Kathlamet, Clackamas, Tumwater, Watlala bands of the Chinook, the Tualatin Kalapuya, Molalla and many others who made their homes along the Columbia River.

We offer our respect and appreciation to the generations of Indigenous people that came before and to those who continue to actively work to care for the land. Today, Portland's diverse and vibrant Native communities are 70,000 strong, descended from more than 380 Tribes, both local and distant. We invite you all to take a moment to consider the many legacies that bring us together in community.

PROJECT OVERVIEW

Scope of Project

The Portland Revels IDEA consultation was intended to assess at baseline-level the internal equity, diversity, and inclusion climate in order to inform short-term goals and long-term vision for the ongoing commitment to IDEA at Portland Revels. Consideration was given to the external impact of doing this work internally as an arts organization.

The scope of this project also included two trainings with the Board and staff around areas that support the stated IDEA commitment and the output of a short term and 5-year plan with recommendations for a sustained process that considers the context and considerations unique to Portland Revels. Initial discussions with leadership identified the following areas of focus (deliverables) for the consultation:

1. Abbreviated-Scope Needs Assessment with Short-Term and Five-Year IDEA Plan
2. IDEA Training Series for Board and Staff

The Abbreviated-Scope Needs Assessment was designed to provide a high quality and efficient baseline assessment to inform a short and long term IDEA plan within the budget constraints of a smaller arts organization. This involved examining both existing data and documents and designing an opportunity to collect new information using a complementary methodology. An additional and less formal opportunity for new data was built into the second deliverable (IDEA Training Series for Board and Staff) by examining the pre- and post-training knowledge related to the learning objectives for each training. These additional surveys helped confirm the baseline IDEA knowledge and commitment within the organization that was being determined through the analysis of the formal Needs Assessment data sources.

It is worth noting that the areas of focus/deliverables of the consultation did have some overlap, informing and/or confirming each other. For example, the pre- and post-training surveys (as noted above) provided some confirmation to what was emerging from examination of the needs assessment data while the information being learned over the course of the needs assessment helped inform the training topics. For the purposes of this report, these deliverables and their process and learnings are described in separate sections but any critical points of overlap are referenced as needed.



PROJECT OVERVIEW

Consultative Resource Team (CRT)⁵

Crucial to the needs assessment process was the establishment and engagement of the Portland Revels “IDEA Consultative Resource Team” (IDEA CRT), which was comprised of a small group of key members of the Portland Revels community representing various roles within the organization. The role of the CRT was to provide feedback and insight to Dr. Gil-Kashiwabara regularly throughout the consultation process (especially during the needs assessment) in order to weigh-in on aspects of the project, provide feedback and collaborate. Leadership intentionally identified who to invite/nominate to be part of the CRT in order to bring together a group that would provide a well-rounded and multi-perspective lens to the consultation. The establishment of a Portland Revels IDEA Consultative Resource Team (IDEA CRT) promoted a collaborative approach in that regular check-in meetings were utilized to provide guidance on certain aspects of the project (e.g., verifying that interview protocol items were covering all needed areas), thus assuring that the methods being used were optimal and accurately reflecting the Portland Revels staff/board/internal community.



Overview of Deliverable 1: Abbreviated-Scope Needs Assessment with Short-Term and Five-Year IDEA Plan

As noted above, the Needs Assessment served as a way to obtain a baseline of the IDEA climate at Portland Revels, which in turn informed the short-term and five-year Recommended IDEA Plan. Because the Needs Assessment was abbreviated in scope, and the Portland Revels had already begun initial work in the IDEA space, the consultant was able to review existing Portland Revels IDEA-related data and documentation (“Existing Data and Documents”) to identify themes / conduct an analysis related to IDEA strengths and areas for growth. As well, there was a need to obtain new information beyond what was available in the existing data and documentation provided, and this new data was collected by the consultant via key informant interviews and incorporated into the overall Needs Assessment analysis. The Needs Assessment data sources are described on the following page.



5. Portland Revels IDEA Consultative Resource Team members included: Sharron Gargosky, Shuhe Hawkins, Olivia Leap, Robert Lockwood, and Nancy Molina.

PROJECT OVERVIEW

Deliverable 1 Information and Data Sources

The following diagram describes information and data sources that were reviewed and analyzed in order to inform and complete the Abbreviated-Scope Needs Assessment.

Diagram 1



PROJECT OVERVIEW

Overview of Deliverable 2: IDEA Training Series for Portland Revels Staff and Board

Dr. Eleanor Gil-Kashiwabara facilitated two in-person trainings for the Portland Revels Board and staff in Fall 2023. Training topics were determined based on the identified action items from the Spring 2022 Board and Staff meeting, as well as preliminary themes from the Needs Assessment conducted by the consultant. As well, feedback from the pre-and post surveys from Training 1 helped to guide the topic and structure for Training 2. The training topics were as follows:

Training 1 - *Uncovering Implicit Biases and Areas of Resistance: Self-reflection in Support of a Meaningful IDEA Journey (September 25, 2023)*

Learning objectives focused on individual self-reflection related to privilege, marginalization, implicit biases and resistance to IDEA work. The importance of self-reflection as an enhancement to the IDEA work was emphasized as well.

Training 2 - *Culturally Responsible and Intentional Community Engagement: Identifying and Understanding Good Practices, Potential Pitfalls, and Opportunities for Repair (October 19, 2023)*

Learning objectives focused on identifying effective approaches for culturally responsible and intentional community engagement to employ along the Portland Revels IDEA journey, including identification of potential pitfalls and approaches for repair that minimize/eliminate harm. The training also provided an opportunity to practice applying the presented approaches through analysis and discussion of vignettes depicting various community engagement scenarios.

Deliverable 2 Data Sources

With regard to each training, pre- and post-training surveys were conducted to obtain information about baseline understanding and acquisition of the learning objectives before and after each training. Narrative feedback was also obtained from these surveys. These training surveys helped to confirm findings from the primary sources in the Abbreviated-Scope Needs Assessment as well as inform potential areas to be aware of, both with regard to organizational strengths and areas for growth, while creating the Recommended IDEA Plan. In addition, the surveys from Training 1 helped to inform the Training 2 topic while the surveys from both trainings provided information around the baseline IDEA readiness and commitment within the organization.

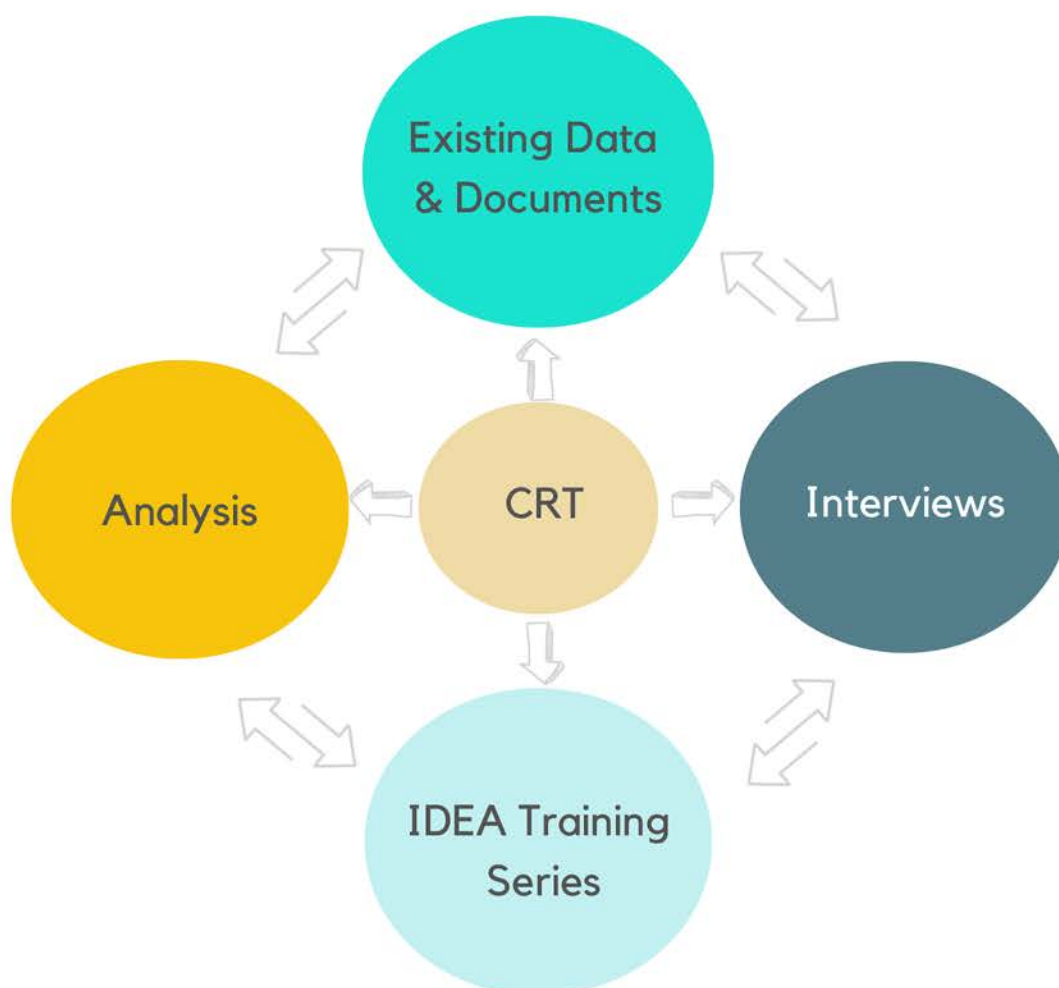
PROJECT OVERVIEW

Methodology

The following section provides an overview of the overall project methodology as well as methodological details for each of the primary stages in the information gathering process.

The Needs Assessment and overall consultation process is iterative and some phases mutually inform each other. For example, the consultant developed the IDEA Trainings in response to preliminary themes from the Needs Assessment. Feedback from the IDEA Trainings then informed the Recommended IDEA Plan. Additionally, feedback from the CRT was informative throughout the consultation process. Diagram 2 visually represents this iterative process.

Diagram 2



PROJECT OVERVIEW

Methodology

1 Review of existing, relevant Portland Revels IDEA data and documentation.

- a. Existing *data* that was reviewed was survey data gathered through the 2022 Audience Survey via Survey Monkey following the 2022 Midwinter Revels Production. The survey link was emailed to audience members after the performance for online completion. The survey asked about demographics, aspects of their Portland Revels experience, and likelihood of returning to a performance. The survey included a narrative question as well, asking audience members what they enjoyed most about the production. 185 audience members completed the survey.
- b. Existing *documentation* that was reviewed included the following: Notes from the 2022 Annual Meeting DEI Summary and Next Steps, the approved Portland Revels Land Acknowledgement, the Portland Revels Anti-racist Statement, and the Partnership Evaluation Tool. These forms were reviewed by two members of the consultation team to have some organizational context of what had been done already in the IDEA space, to look at readiness factors for the work ahead (in order to inform the nature of the plan), and to identify some themes from the existing IDEA documents to incorporate into the larger thematic analysis of the Needs Assessment.

2 Review of other related Portland Revels documentation.

- a. The materials reviewed in this category included Board documents, such as background information about Board leadership, policies, and bylaws. This information was not incorporated into the broader thematic analysis but served as a reference and provided organizational context to the consultant and her team.

3 Review of new data collected by the consultant.

- a. Key informant interviews.
 - i. Conducted with five key informants, each representing a distinct role in the organization and diverse representation. The roles represented by the key informants were: (1) Volunteer, (2) Board member/staff/contractor, (3) Chorus, (4) Audience, and (5) Special someone else.
 - ii. With the advisement of leadership and the CRT, multiple individuals per role category were recommended. Consultant invited from this broader list in order to preserve some confidentiality for the final five participants.

PROJECT OVERVIEW

Methodology

3 Review of new data collected by the consultant (continued)

- iii. Consultant sent email invitations to potential interviewees (one in each category to obtain a total of five participants).
 - iv. Interview protocol questions were developed and revised by Luminosa in collaboration with Portland Revels leaders and the CRT.
 - v. The five interviews were conducted over zoom, recorded for transcription purposes, transcribed, then uploaded into a web-based qualitative analysis software program (Taguette). Once in Taguette, interviews were ready to be sorted thematically and analyzed.
 - vi. Each of the interviews were coded by two members of the research team in order to increase accuracy of themes by comparing analyses and confirming agreement on content interpretation.
 - vii. Recordings were destroyed after transcriptions were completed. It is important to note that any data from interviews (quotes) in this report have been de-identified for confidentiality and quotes selected were those unlikely to identify the participant.
- b. Pre- and post-training participant survey data from Board and Staff IDEA Trainings Series (trainings were part of Deliverable 2)
- i. As noted above, two IDEA trainings were conducted with the Portland Revels board and staff as part of the consultative scope of work. Pre- and post-training surveys were conducted before and after each training in order to obtain information about baseline understanding of learning objectives (pre-training) and acquisition of the learning objectives (post-training). Narrative feedback was also obtained from these surveys.
 - ii. The trainings were held in-person but there was a hybrid option for some individuals who were not able to attend in-person. The in-person participants completed paper versions of the surveys on-site immediately before and after each training while the hybrid participants were emailed the surveys and asked to send the surveys back within one day of the training.
 - iii. For Training 1, nine respondents completed the pre- and post- surveys; For Training 2, thirteen participants completed the pre-training survey and twelve participants completed the post-training survey.
 - iv. Pre- and post-training survey responses were entered into Qualtrics and downloaded into Excel for analysis of basic response trends. Narrative feedback was also reviewed and incorporated into the overall thematic analysis. Survey data was more heavily used to confirm preliminary findings from the other sources of the needs assessment and to get a pulse on organizational readiness factors to consider in creating the IDEA plan.

PROJECT OVERVIEW

Analysis

The analysis was completed using a multi-tiered approach. The first level of analysis involved summarizing the data trends or themes for each individual data source. The second level involved looking at themes and trends across data sources to create an integrated picture of the IDEA baseline and identified priorities in order to create the Portland Revels IDEA Plan.

Below is a high-level overview of the analysis approach used for looking at each of the separate information gathering components, followed by a description of the analysis approach for examining and summarizing common themes across data sources.

First Level/Tier Analysis

1 Review of existing, relevant Portland Revels IDEA data and documentation.

A 2022 Midwinter Revel's Audience Survey. As noted above, the survey was administered via Survey Monkey. Using Survey Monkey, the consultation team completed basic descriptive analyses and examined frequencies. Narrative responses were reviewed by two consultation team members and coded⁶ into themes, which were later incorporated into the broader thematic analysis across data sources.

i. Highlights from results for participant descriptives from the survey include:

1. Age of respondents ranged from mid-30s to 80+, with the majority of respondents being in their 60s and 70s
2. 91% of respondents were European American/White
3. Demographics: 28% Living in a rural area, 26% religious minority, 19% member of the LGBTQIA+ community, 17% living with disability, 16% low income, 10% immigrant or refugee
4. 10% of respondents said they experienced challenges in learning about the production, purchasing tickets, or traveling to/accessing the venue
5. Attendance history and commitment: 23% had attended 7-10 Revels productions; About 15% of respondents attended 16+ shows. Over 70% of respondents said they were very likely to attend a future Revels production.

6. In both levels of data analysis, analysis involving coding data into themes was always conducted by two members of the consultation team in order to achieve consistency in theme development and interpretation and obtain higher level of accuracy. Consultation team members involved in coding the data are trained in qualitative data analysis.

PROJECT OVERVIEW

First Level/Tier Analysis

1 Review of existing, relevant Portland Revels IDEA data and documentation. (continued)

ii. The consultant reviewed qualitative/narrative result highlights from the audience survey and sorted responses into themes. Common reasons shared by audience members as what they loved most about the show fit into the following thematic categories:

Music and special acts

*"...exceptional acting with the usual great choral, orchestral music; the flamenco music was superb."
"The music was beautiful, and the singers were incredible."*

Blending of traditional with new

"The traditional parts of the show, like Lord of the dance, plus the varied international themes that Portland Revels does so well."

The set

"Set and lighting, as usual, were top notch. The panels with the projections depicting travel or action were terrific."

Sense of community (includes audience participation)

*"The community spirit of it."
"The 'family' feeling."*



PROJECT OVERVIEW

First Level/Tier Analysis

1 Review of existing, relevant Portland Revels IDEA data and documentation.

B Existing Documentation. The forms in this category were reviewed by two members of the consultation team. These forms included the Notes from the 2022 Annual Board and Staff Meeting DEI Summary and Next Steps, the approved Portland Revels Land Acknowledgement, the Portland Revels Anti-racist Statement, and the Partnership Evaluation Tool. Results/thematic takeaways from the review of existing documentation include the following:

- Portland Revels staff and leadership have demonstrated a desire to address IDEA via the identification of IDEA goals.
- Portland Revels has demonstrated initial commitment to IDEA by establishing and approving an Anti-Racist Statement, Land Acknowledgement, and implementing an early version of the Partnership Evaluation Tool.
- Portland Revels’ intention for long-term commitment to IDEA is demonstrated by the engagement of an IDEA consultant as well as a desire to seek community feedback (for example via the Partnership Evaluation Sheet and the activities of the Needs Assessment). The Partnership Evaluation Tool was developed in 2022 as a tool to track IDEA work and other things, both with new and long-time partners, professional members of the creative team, and volunteer performers.

The demands of focus that came out of the 2022 Annual Board and Staff Meeting are also in alignment with thematic categories from the review of existing documentation. These are:

| Demand of Focus | Maps to Thematic Category |
|--|--|
| Create a safe/antiracist environment for BIPOC people | Safety in the organization- <u>need for accountability</u> to align with IDEA and representation |
| Board/leadership should seek out those who are different from themselves and value their differences | <u>IDEA trainings/education</u> with staff and board |
| Enforce accountability to antiracism | <u>Safety</u> in the organization |
| Boards must overhaul their membership to be more inclusive and to better reflect the global majority | <u>Representation, inclusion and outreach</u> |

PROJECT OVERVIEW

First Level/Tier Analysis

2 Review of new data collected by the consultant.

A Key informant interviews. As noted above, interviews were double coded for accuracy and verification purposes. The analysis of the interviews in terms of organization structure and corresponding themes that emerged was as follows.

| 1. Current Climate and Environment (Strengths and Areas for Improvement) | 2. IDEA Priorities (Immediate and Long-Term) |
|---|---|
| <p><i>Climate/Environment strengths included themes:</i></p> <ul style="list-style-type: none"> • Feeling of community • Feeling of inclusion • Programming (music, quality) • (Good) Intention | <p><i>Immediate IDEA priorities included these themes:</i></p> <ul style="list-style-type: none"> • Community outreach • Increase participant and audience diversity • Financial support/access for low-income community members • Protocol for accountability or management of IDEA missteps (e.g., code of conduct) • Specific trainings (history, outreach, inclusive organization) |
| <p><i>Climate/Environment areas for Improvement included themes:</i></p> <ul style="list-style-type: none"> • Inclusion related to race/ethnicity (casting, audience) • Lack of representation in programming, barriers to participation (neurodiversity, children and families with intersecting identities) • Need for outreach, overall financial barriers (high ticket prices, unpaid positions) | <p><i>Long-term IDEA Priorities included this theme:</i></p> <ul style="list-style-type: none"> • Sustainability plan for the immediate goals |

PROJECT OVERVIEW

First Level/Tier Analysis

2 Review of new data collected by the consultant.

B *Pre- and post-training participant survey data from Board and Staff IDEA Trainings Series (completed as part of Deliverable 2).* As noted in the Methodology section, the IDEA trainings created another opportunity to collect information from within the organization (board, staff and leadership) this time to ascertain baseline understanding of topics to be covered and level of acquisition of concepts following the training. Information from the trainings also provided preliminary insight around organization readiness, ideas for future training topics and direction for the plan. Finally, but not least, the information helped to confirm the findings emerging from the other (primary) data sources used in the Needs Assessment. Data highlights (quantitative and qualitative) emerging from the surveys are shown below.

Training 1

- The training particularly increased respondents' ability to describe one fear or area of resistance about the Portland Revels IDEA work, followed by their ability to describe how resistance might show up in their body.
- Participants identified that the process of hearing from others about their backgrounds was the most helpful aspect of the training as well as the opportunity for self-introspection related to biases.
- Participants expressed an intention to learn more about how to move toward responsible and ethical outreach and engagement with communities given the role of community outreach as part of the Portland Revels IDEA Plan in progress.

Training 2

- This training particularly increased respondents' ability to demonstrate awareness about navigating IDEA missteps in a culturally responsible manner that reduces harm through the discussion of community engagement vignettes.
- Discussion and analysis of vignettes were mentioned as the most helpful aspects of the training, and this modality was identified as useful for future training and education experiences within the organization.
- Another helpful aspect of the training was the presentation of community engagement pitfalls.
- Appreciation was expressed for clarification of terms, concepts, and perspectives, including micro and macro lenses, individual and systemic, paternalism and white saviorism, and corporate and organizational perspectives.

PROJECT OVERVIEW

First Level/Tier Analysis

2 Review of new data collected by the consultant. (continued)

B *Pre-and-post-training participant survey data from Board and Staff IDEA Trainings Series (completed as part of Deliverable 2).* Data highlights (quantitative and qualitative) emerging from the surveys are as follows:

Key Takeaways from Both Trainings

- Portland Revels Leadership, staff and board are willing to engage in the self and organizational reflection needed to engage in and sustain IDEA work over time. This maps on to the theme in other data sources around ongoing training and education within the organization, which will ultimately aid in the successful implementation of the plan and sustain the work of the longer Revels IDEA journey.
- Resistance (fear) about the changes the IDEA journey may bring is real and awareness of areas of resistance was identified as an important aspect of the work both individually among team members and at the organizational level. At the same time, awareness of resistance areas is also accessible to the team and there is a commitment to exploring and addressing resistance in order to support ethical and responsible approaches to community outreach and engagement.



PROJECT OVERVIEW

Second Level/Tier Analysis: Common Themes Across Data Sources

The IDEA Consultation Phase 1 (Abbreviated-Scope Needs Assessment) also involved analysis across multiple data sources, not solely the new data from the key informant interviews. All of the information and data sources described above and the resulting themes from review/analysis within each data source were ultimately brought together for an additional level of review to find the commonality across the themes. This was also a consultation team process where multiple team members looked across the themes to identify commonalities and then the team came together to discuss, collapse and refine the common themes into four key areas. These four key areas/major themes are shown in the table below:

| | |
|----------------|---|
| Theme 1 | A need for diverse audience and membership inclusivity related to race/ethnicity and the global majority. |
| Theme 2 | A need for community outreach in order to improve access for children and families and those from low-income backgrounds and/or intersecting minoritized identities. |
| Theme 3 | There are important strengths that can benefit the Portland Revels IDEA work. These include the high-quality music, set, dance and other performance aspects that blend the “new” with “traditional” Revels performance themes, and the felt sense of community strength and belonging. |
| Theme 4 | A need to create a safe, antiracist environment for BIPOC via the hiring and engagement of a diverse Board and staff, the establishment and enforcement of an accountability process for being antiracist (including the creation of a code of conduct) and ongoing IDEA education within the organization. |

Quotes that exemplify these key themes have been shared on the following pages and sprinkled throughout the report to provide additional context. In the IDEA Plan section, these common themes across data sources are the drivers of all of the recommendations, both for the immediate and long-term.

PROJECT OVERVIEW

Excerpts from Needs Assessment Interviews

"The climate is good. I think it's very welcoming. I think it's very caring."

- Portland Revels interviewee

"I loved the way everybody was so inclusive, and everybody really, they took care of me. Everybody took care of each other. I really liked the family aspect of it."

- Portland Revels interviewee

"I think the Revels reflect a certain segment of the Portland community and overall has not been a very inclusive organization. I think there are a lot of good intentions, but the structure of rehearsals and performance preparation, the amount of time leads to a pretty elitist organization."

- Portland Revels interviewee

"I don't think it's enough to say, well, we don't, we can't pay everyone, so we're not going to pay these kids. I just, you're not going to get them if you don't pay them. Because families can't afford that."

- Portland Revels interviewee

"I think they're they seem to be headed in the right direction and... getting the kids is good and including kids allows you to get I think different, different differences."

- Portland Revels interviewee

PROJECT OVERVIEW

Presentation of Preliminary Findings to CRT for Verification, Discussion and Feedback

Dr. Gil-Kashiwabara presented the preliminary findings to the CRT on July 13, 2023. The purpose of the meeting with the CRT was to present preliminary findings (across data sources) of the Needs Assessment in order to hear the CRT's thoughts/impressions about these findings to help guide the short and long-term plan/planning process as well as obtain input on the training topics for Phase 2.

The guiding questions for the CRT discussion were as follows:

- Based on your impressions of the preliminary findings, are there any strong goals that should guide the IDEA plan?
- What do you feel are the priority areas for the short and long-term plan?
- Based on your impressions of the preliminary findings, what topics of focus should be prioritized for the Phase 2 staff and board trainings?

The discussion with the CRT allowed for a deeper examination around the priority focus for the IDEA work based on the analysis themes. A major priority area in the Recommended IDEA Plan based on the findings and CRT discussion is in the area of outreach, especially related to children and families with intersecting identities (race/ethnicity and low-income).

Ideas for an intentional and focused approach were discussed and some ideas and questions that were considered related to this priority included:

- Intentional outreach takes time and is relationship focused.
- Who (which community) do we want to prioritize first and what do we do to engage that community? This is the first step.
- Different cultures have different ideas about what is entertaining.
- Collaborating with a school, making music available to a school ahead of time.
- Possibly splitting off the kids show; A challenge is the programming of the show itself.
- How can we change the traditional structure of how theatre happens?
- We need to think outside the box about how to engage.

A focus on outreach as a priority in the Recommended IDEA Plan will have the effect of at least partially addressing theme/finding 1 (need to diversify around race/ethnicity) and will incorporate a building on the identified organizational strengths of Portland Revels (theme/finding 3). Sustainability is a longer-term priority featured in the plan. CRT discussions also highlighted the importance of having a sustainability plan for the outreach and engagement taking place as part of the IDEA goals and actions.

RECOMMENDED PLAN

The Portland Revels Recommended IDEA Plan is grounded in anti-racism with an emphasis on dismantling white supremacy culture. An understanding of the decolonization framework, as well as the importance of being trauma-informed (and racial trauma-informed) is advised as an important foundation to guide the work in the IDEA Recommended Plan. This grounding in antiracism will support ongoing IDEA work from an intersectional framework as well as future IDEA efforts focused on other systems of oppression.

For the purpose of a shared understanding of this document, these terms are defined as follows:

Definitions

Antiracism: A system of equity based on race that is created and maintained by a dynamic interplay between psychological factors (i.e., equitable thoughts, feelings, and actions) and sociopolitical factors (i.e., equitable laws, policies, and institutions; APA, 2023; Roberts & Rizzo, 2021).

Decolonization: The process of “undoing the impacts of historical domination on subordinated populations by powerful outsiders” (APA, 2023; Gone, 2021, p. 259). The legacy of settler colonialism is dislocation, dispossession, and displacement (Liu et al., 2023) as well as discrimination, oppression, and White privilege. Decolonization is a process of examining and undoing the epistemological injustice, harm, and exclusion that resulted from these historical and present-day processes (Silva & Students for Diversity Now, 2018) and a demand for “land-back” and other forms of economic and cultural justice (APA, 2023).



RECOMMENDED PLAN

Definitions (cont.)

Dismantle: To dismantle a system means to cause it to stop functioning by gradually reducing its power or purpose (Collinsdictionary.com).

Racial/Racialized/Race-based Trauma: A form of race-based stress, referring to people of color and Indigenous individuals' reactions to dangerous events and experiences of racial discrimination. Such experiences may include threats of harm and injury, humiliating and shaming events, and witnessing racial discrimination toward other people of color. Although similar to posttraumatic stress disorder, racial trauma is unique in that it involves ongoing individual and collective injuries due to exposure and reexposure to race-based stress (APA, 2023).

White Supremacy Culture: A form of racism centered on the belief that biological and cultural Whiteness is superior to people of other racial backgrounds and that whites should politically, economically, and socially dominate non-whites. This is a pervasive ideology that continues to polarize the United States and undergird racism (APA, 2023; NEA Center for Social Justice, 2020).

Trauma-Informed: To recognize the pervasiveness of trauma in the world and seek to be responsive to this unfortunate reality. Becoming aware of trauma's many personal and societal consequences, anticipating how trauma survivors may respond to our words and actions, and working to create a world that does not cause further harm. Being trauma-informed also means helping to create a world that can foster growth, resiliency, and healing. Guiding principles of being trauma informed include safety, trustworthiness and transparency, collaboration and mutuality, empowerment/voice and choice and understanding cultural, historical and gender issues as potential contributions to the trauma experience (SAMHSA, 2014). Being trauma-informed supports (self and organizational) reflection and provides momentum to take action within anti-racist and anti-discriminatory organizational practices.



RECOMMENDED PLAN

Some examples of how this grounding will be visible in the IDEA Recommended Plan include the following:

Employing the lens of “measuring differently.” The practice of measuring progress through benchmarks, for example, is a linear model/practice of measuring success that is rooted in white supremacy. An overfocus on such approaches does not necessarily lead to the desired outcome. In this document, the emphasis is instead placed on *example indicators of progress*, which are intentionally broad and fluid with the intention of pushing away the linear models of success. By taking this approach, we challenge our self-appointed authority in choosing what outcomes to pursue (yes, even with a community-based approach, there is a risk of this still happening). This approach creates wiggle room for the ongoing input of the community and what *feels* right for the community versus what “*is*” right because it is listed as an intended outcome.

Moving away from a sense of urgency. A continued sense of urgency can make it difficult to take the time to be inclusive, encourage democratic and/or thoughtful decision-making, to think long-term, and to consider consequences. The urgency approach frequently results in sacrificing potential allies for quick or highly visible results, for example sacrificing interests of communities of color in order to win victories for white people. This concept, which is further elaborated on in the *Timeline* section below, ultimately has to do with taking the time to create meaningful and lasting change and “going slow to go fast.” This approach allows for realistic and fluid/overlapping timelines for the work plan, both short and long-term, and supports relationship building to better integrate community perspectives at the outset, which will result in a sustained journey over time.

Moving away from perfectionism. Perfectionism is a characteristic of white supremacy that holds everyone’s work to an unreasonable standard set by those with the most privilege. This plan is presented with the recognition that there is not one perfect approach to this work. There is space for a process to unfold while still holding the intention to do better, awareness of the impact of missteps and appropriate reparations, and ongoing work to reduce harm to those impacted by racism and all intersecting forms of oppression.

Language matters. Language is powerful and the use of certain words and terminology that are infused into our everyday language can create harm to marginalized communities. By intentionally attending to inclusive language, the aim is to engage in the dismantling of the destructive hierarchies that have marginalized people from equitable representation and participation in society (APA, 2023). The use of inclusive language is an important way to effect meaningful change in the IDEA space. This report is written with inclusive language in mind.

RECOMMENDED PLAN

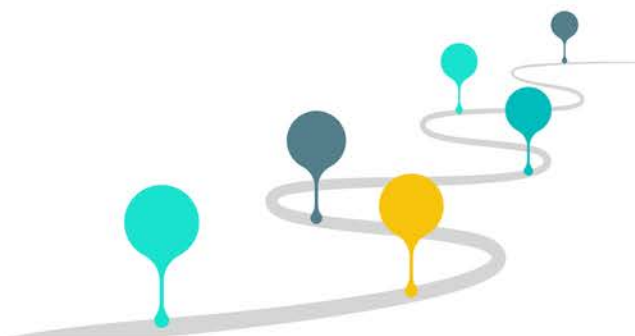
The concepts on the previous page represent a few ways in which the anti-racist, racial trauma-informed, dismantling of white supremacy and decolonization perspectives are integrated into the Recommended IDEA Plan. There are both subtle and more obvious ways you will notice attention to the grounding frameworks throughout the document.

With this anchoring, the Recommended IDEA Plan includes steps that the Portland Revels can take over the next five years in support of the priorities identified from the Needs Assessment and to build on the Portland Revels community's strengths in order to address gaps and opportunities that emerged through the IDEA consultation. IDEA organizational change work involves deep and ongoing commitment from leaders and community members. The Recommended Plan is not a linear or static roadmap but rather a compass that will provide guidance for Portland Revels as the organization continues to move forward in its IDEA journey.

Timeline

For the purposes of this Recommended IDEA Plan, Immediate and Short-Term priorities are defined as actions that the organization can begin to address immediately, with the aim to make progress in these areas within three years. Long term priorities may involve immediate steps that the organization can continue to build on over the next three to five years.

Keep in mind that even the "immediate" priorities will take time. Crucial for pushing against white supremacy norms embedded in workplace practices is understanding the overlap and fluidity between short-term and long-term goals. Some priorities will be highlighted in both the Immediate and Long-Term Recommendations. Portland Revels should continually evaluate progress in each of the short-term and long-term areas and adjust timelines and specific activities as needed in support of ongoing and additional feedback from the community, changes in the environment, and other complexities.



RECOMMENDED PLAN

Immediate and Short-Term Priorities (0-3 Years)

Based on community feedback and insights from the Needs Assessment, the consultant recommends that Portland Revels immediately prioritize the following areas of focus.

1

Intentional Community Engagement Plan.

Develop and implement an intentional, culturally appropriate and collaborative plan to partner with a specific community (potential focus: children/families/school intersecting with race/ethnicity and low income).

Context:

Intentional community partnerships can contribute meaningfully to the goals of broadening audience diversity, reducing barriers to engagement with Portland Revels, and increasing access to Portland Revels programming.

This goal builds on the existing strength of the strong sense of community that was highlighted in the Needs Assessment.

Important Considerations:

As highlighted during the consultant's Training 2 with Portland Revels, common missteps or pitfalls when organizations engage communities include white saviorism, paternalism, microaggressions, tokenism, performative allyship, and an either/or approach that does not account for intersectional identities and experiences.

Potential Actions:

1. Invest in meaningful relationships with a specific community/communities in alignment with IDEA values. (e.g. BIPOC communities in North/Northeast Portland or immigrant communities in outer Southeast Portland).
 - i. When possible, drawing on existing networks and relationships within the Portland Revels community.
2. Establish an intentional, long-term collaborative partnership with a specific neighborhood school and/or youth-focused organization.

RECOMMENDED PLAN

Immediate and Short-Term Priorities (0-3 Years)

1 Intentional Community Engagement Plan (cont.)

Develop and implement an intentional, culturally appropriate and collaborative plan to partner with a specific community (potential focus: children/families/school intersecting with race/ethnicity and low income).

Example Indicators of Progress

- ➔ Portland Revels staff and Board are knowledgeable about local history for communities of color (both holistically and related to Portland Revels' work) and have an understanding of ways to leverage organizational resources to benefit that community.
- ➔ Portland Revels is invested in building reciprocal relationships with BIPOC-led organizations within the identified community of focus, with the goal of growing connections and commonalities rather than furthering a specific project or program deliverable. The community understands Portland Revels' intentions around reciprocal relationships and experience it as such, demonstrated through the community partner being comfortable with initiating requests or collaborations. This includes Portland Revels regularly showing up when other organizations in the community ask for support.
- ➔ Before engaging communities and beginning a new partnership/project, Portland Revels has dedicated time to ensuring that the organization has the staff, time, and funding to build accountable relationships. For example: Are you able to stay in a community/school for the next three years? Can you provide resources such as childcare, food, and transportation to remove barriers to participation? Are you holding meetings in inclusive spaces?
- ➔ When making decisions regarding programming and community-partner related activities, representatives from the community(ies) are collaboratively involved in the process from start to finish.
- ➔ Decisions about programming and use of resources are responsive to priorities identified by the specific communities being partnered with.
- ➔ Opportunities for feedback are ongoing and accessible throughout the partnership process. Feedback is welcomed and responded to with intentionality to the relevant grounding principles of the Recommended IDEA Plan.

RECOMMENDED PLAN

Immediate and Short-Term Priorities (0-3 Years)

2

Diversify Inside the Organization and Develop a Safe and Inclusive Organizational Culture.

Cultivate a more diverse board, staff, and performers, and ensure that staff hire(s), contractors, volunteers, and vendors reflect a commitment to the IDEA mission.

Context:

This maps onto the Portland Revels' intention to create a safe/antiracist environment for BIPOC people.

Throughout the Needs Assessment, many Portland Revels community members emphasized the strong sense of community and belonging within the group. Efforts to broaden racial and ethnic diversity align with this existing value for meaningful community and connection.

From the Portland Revels website and feedback from the Needs Assessment, the organization's intentional commitment to reflecting increased diversity within Portland Revels programming was evident as a strength. The consultant encourages Portland Revels to continue with this commitment, which supports efforts to diversify representation inside of the organization.

Important Considerations:

Efforts to transform a predominantly white organization into a more racially and ethnically diverse group need to be done with intentionality and mindfulness to organizational readiness. Rushing this work commonly leads to unconstructive conflict and harm for BIPOC individuals.

There is a high risk of harmful tokenism when engaging in efforts to diversify a group. Tokenism can happen unintentionally and can manifest as hyper focus on an individual, overrepresentation in marketing materials, and having a narrow view of an individual's skills and potential.

Intersectionality is key. Be mindful of pigeon-holing individuals as narrow representatives of isolated experiences or identities.

Remain attentive to resistance to change efforts. As highlighted in the consultant's Training 1 with Portland Revels, common forms of IDEA resistance include defending, denying, and distancing. Leaders need to be prepared to address these behaviors when they emerge.

RECOMMENDED PLAN

Immediate and Short-Term Priorities (0-3 Years)

2

Diversify Inside the Organization and Develop a Safe and Inclusive Organizational Culture (cont.)

Cultivate a more diverse board, staff, and performers, and ensure that staff hire(s), contractors, volunteers, and vendors reflect a commitment to the IDEA mission.

Potential Actions

This section includes examples of potential actions that would support this priority, including initiatives currently in progress.

1. Engage with an organizational readiness assessment tool⁷ to provide baseline insight into the organization's current cultural climate and readiness for meaningful engagement with racial diversity.
2. Conduct an internal audit of organizational processes, policies, and procedures including HR materials, staff and Board recruitment and onboarding, recruitment and oversight of professional actors and volunteers, and community partnership processes.
 - i. For example, review the Community Partnership Feedback process. How clear and accessible is the language? What if any barriers might exist for community partners in sharing meaningful feedback? How might you provide multiple formats for inviting community feedback (e.g. video or audio feedback, online and written evaluation forms)?
3. Incorporate IDEA commitments, including accountability to ensuring safety for BIPOC individuals and other marginalized communities, into hiring materials and contracts for all staff, Board, performers, and contractors.
4. Establish an intentional process for balancing the strengths of historical insight/institutional knowledge and new perspectives within the Board.
 - i. For example, consider Board term limits, scheduled rotation of Officer roles, and/or other ways to mitigate static Board membership. This supports longer-term efforts to increase overall representation within the Portland Revels community.
5. Invest in intentional efforts to develop a pipeline for Board membership and professional and volunteer actors.
 - a. For example, create a standing Board committee and/or special projects that include paid positions for representatives from community partners, professional and volunteer actors, and families. Promote both paid and volunteer engagement opportunities at Portland Revels events and within the broader community.

7. Refer to Appendix A and B for example organizational readiness assessment tools.

RECOMMENDED PLAN

Immediate and Short-Term Priorities (0-3 Years)

2

Diversify Inside the Organization and Develop a Safe and Inclusive Organizational Culture (cont.)

Cultivate a more diverse board, staff, and performers, and ensure that staff hire(s), contractors, volunteers, and vendors reflect a commitment to the IDEA mission.

Potential Actions

6. Develop intentional vendor engagement policies and procedures that prioritize businesses led by BIPOC and other marginalized communities, and ensure equitable payment. Be mindful of unintended impacts of contract negotiation that can undervalue BIPOC actors and contractors.
7. Commit to intentional strategies to educate Portland Revels audience and stakeholders about the organization’s IDEA Consultation, Recommended IDEA Plan, and ongoing IDEA work.

Example Indicators of Progress

- ⇒ Outcomes of the Portland Revels IDEA Consultation, including the Recommended IDEA Plan, are accessible by the community.
- ⇒ Data for staff, Board, contractors, vendors, and volunteers is consistently tracked and regularly reviewed for alignment with IDEA principles (e.g. demographics, pay rates, accessibility needs, etc).
- ⇒ Constructive feedback and dissent is welcomed and normalized in the environment. Opportunities for discussion about the internal organizational culture are regularly incorporated into meetings and evaluation processes.
- ⇒ Contract, RFP, and/or grant language is explicit about the organization’s commitment to equity and anti-racism, and these materials are transparent about how, if relevant, the organization prioritizes contractors and vendors led by marginalized communities.
- ⇒ IDEA commitments are consistently considered in hiring/appointment decisions for all staff and Board roles.

RECOMMENDED PLAN

Immediate and Short-Term Priorities (0-3 Years)

2

Diversify Inside the Organization and Develop a Safe and Inclusive Organizational Culture (cont.)

Cultivate a more diverse Board, staff, and performers, and ensure that staff hire(s), contractors, volunteers, and vendors reflect a commitment to the IDEA mission.

Example Indicators of Progress

- ⇒ Language explicitly addressing the organization's anti-racist commitments is included in contracts, job descriptions, onboarding materials, and performance evaluations, and accountability measures are in place to support inclusivity and safety for marginalized community members.
- ⇒ Portland Revels regularly attends networking events and community gatherings centered around BIPOC communities (e.g. quarterly "Say Hey" organized by Partners in Diversity)
- ⇒ Portland Revels is involved in local and/or industry coalitions that focus on racial equity and include leadership from marginalized communities.

"I think that unless you get a better pipeline of participants, it's going to be really tough to change the audience. You know, they both have to happen. There needs to be a relationship between the performer and the audience. I really feel strongly that reaching into the high school performing community could be very powerful."

- Portland Revels interviewee

RECOMMENDED PLAN

Immediate and Short-Term Priorities (0-3 Years)

3 Yearly IDEA trainings for Board and staff.

Context:

This priority maps onto the intention to create a safe/antiracist environment for BIPOC people.

Ongoing IDEA training not only supports continued learning and growth, it also can support the development of an accountability process for IDEA missteps.

Important Considerations:

To avoid IDEA training becoming an “add on” or voluntary choice for Board and staff, emphasize the why for these IDEA training and provide accountability to these trainings as an essential skill-set and competency development tool for Board and staff.

As highlighted during the consultant’s Training 1 with Portland Revels, self-reflection is crucial for an organization’s IDEA journey. IDEA training should balance individual growth and learning with broader systemic awareness and change at the organizational level.

Potential Actions:

1. Provide twice annual required IDEA trainings for Board and Staff.
 - i. Topics can include history, culturally responsive community outreach, being an inclusive organization, and navigating fears/resistance.
2. Invite feedback from the Portland Revels community for IDEA training topics. For example, create a virtual repository for training topic ideas and regularly invite input from all members of the Portland Revels community including Board and staff, community partners, audience, families, actors, and vendors.
3. Incorporate IDEA commitments into existing onboarding and training plans for Board and staff.
4. Incorporate ongoing IDEA discussions and practices into existing Board and staff meeting structures.

RECOMMENDED PLAN

Immediate and Short-Term Priorities (0-3 Years)

3 Yearly IDEA trainings for Board and staff (cont.)

Example Indicators of Progress

- ⇒ IDEA commitments and principles are incorporated into required onboarding for new staff and Board
- ⇒ IDEA commitments and principles are incorporated into all trainings, meetings, and planning discussions, even if the topic of focus is not explicitly IDEA-related.
- ⇒ Portland Revels has designated funding to support regular IDEA trainings for staff and Board members.
- ⇒ Trainings are provided in inclusive and accessible formats with attention to the physical or virtual training environment, different learning styles, accessibility needs, and overall inclusive facilitation approaches.
- ⇒ Annual IDEA training topics are responsive to identified gaps or learning opportunities, priorities identified by BIPOC and other marginalized community members within the industry, and feedback from the Portland Revels community.
- ⇒ Annual IDEA training topics balance introductory IDEA concepts with more advanced concepts and skills to support continued growth and learning.
- ⇒ Portland Revels welcomes and appropriately compensates for IDEA expertise within the Portland Revels community.

“I think there’s a lot to be culled from a wider, more global lens.”

- Portland Revels interviewee

RECOMMENDED PLAN

Long-Term Priorities and Goals (3-5 Years)

Some of the long-term priorities overlap with recommended actions as short term priorities. Based on observations and feedback from the Portland Revels community, the consultant recommends that by Year 3, the organization begins to address the long-term priorities and continues intentional work in these areas based on positive engagement with and progress toward the short term immediate priorities. The aim of the long-term priorities is to build on the foundation from the immediate priorities/areas of focus and sustain the Portland Revels IDEA journey going forward.

The one primary long-term priority outlined below is multi-layered and involves attention to timeline, process, ongoing feedback, and reevaluation. Meaningful progress over time will require Portland Revels to apply a decolonial, anti-racist, and racial trauma-informed lens to continually evaluate what is working and what is not, and to adjust strategic plans in support of IDEA.

1 Create an IDEA Sustainability Plan.

Context:

For the purposes of this work, Sustainability Plan refers to a clear plan for how Portland Revels will remain committed to IDEA work and will sustain progress that is made as an organization.

Establishing a sustainability plan in advance supports accountability and provides opportunities for adjustments as needed to support continued growth based on current needs in the environment.

As with any strategic plan, continual check-ins, re-evaluations of the environment, and review of progress toward goals is essential for IDEA work.

Important Considerations:

Remember that IDEA is a process and journey, not a destination. The list of potential action items is not exhausted and should not be considered “boxes to check.”

Language matters. Throughout the IDEA journey, consider: Where might there be unintended impacts and/or misunderstandings from your communications? Where are you using language that needs to be decolonized?

Balance accountability and fluidity throughout the process. Common risks of white supremacy culture include a hyper focus on perfection and/or deadlines in ways that overshadow the quality of interactions and processes.

RECOMMENDED PLAN

Long Term Priorities and Goals (3-5 Years)

1

Create an IDEA Sustainability Plan (cont.)

Potential Actions:

1. Ongoing IDEA training for the Board and staff, with mindfulness to IDEA learning as a journey and not a “one and done.”
2. Intentional focus on meaningful community outreach and engagement with youth as an important stakeholder within IDEA efforts.
3. Multi-layered mechanism for feedback from community partners who Portland Revels is engaging (e.g., partnership evaluation); making the feedback process as clear and accessible as possible.
4. Regular use of an organizational self-assessment tool⁸ for ongoing self-evaluation of the internal culture and impact related to IDEA priorities.
5. Regularly audit Portland Revels materials, policies, and procedures with an eye toward inclusive language and practices. Who are important stakeholders? Who might be being overlooked? What might be unintended impacts of a communication or decision?
6. Commit to intentional strategies to educate Portland Revels audience and stakeholders about the organization’s ongoing IDEA work.
7. Develop meaningful accountability mechanisms. Establish clear expectations and a process for addressing missteps and harm, with a focus on repair and safety for marginalized community members.
8. Consistently review and revise/update plans and “benchmarks” to ensure transparency and meaningful progress toward IDEA goals.

8. Refer to Appendix C and D for example organizational assessments.

“We all celebrate in different ways, but this is about bringing the community together.”

- Portland Revels interviewee

RECOMMENDED PLAN

Long-Term Priorities and Goals (3-5 Years)

1 Create an IDEA Sustainability Plan (cont.)

Example Indicators of Progress

- ⇒ Racial equity conversations are normalized and happen on a regular basis at all levels of staff and Board meetings and discussions.
- ⇒ IDEA commitments are clearly communicated as an expectation for all staff and Board; IDEA values and commitments are included in all position descriptions and performance evaluation processes.
- ⇒ Organizational decision-making processes regularly ask questions such as: What assumptions might we be making? What power dynamics are at play? How can we gain a more nuanced understanding of the issue at hand? Whose perspectives are missing? Who benefits and who is most burdened from this decision?
- ⇒ Portland Revels engages on a planned basis with an organizational self-assessment tool for ongoing self-evaluation of the internal culture, progress, and impacts related to IDEA priorities. (e.g. annually, bi-annually)
- ⇒ Annual and quarterly goals and strategic plans include IDEA and anti-racism work, which is largely intangible and not quantified by simple numbers. Metrics are evaluated with nuance and attention to qualitative data, with a focus on *quality over quantity*.
- ⇒ Portland Revels uses its power and influence to push arts institutions and philanthropy toward greater racial equity.
- ⇒ The organization takes time to regularly reflect, debrief, and celebrate accomplishments.

CONCLUSION

Portland Revels is an established arts organization with a strong emphasis on honoring a multitude of cultures and backgrounds through its programming. The organization’s commitment to diversity and anti-racism, as well as stated values such as fostering cultural exploration and creating connection, are important foundations for the IDEA journey of the Portland Revels organization.

The Portland Revels IDEA consultation emerged out of staff and Board discussion during the Spring 2022 Annual meeting, including discussion about the We See You W.A.T. document. The project scope was developed through extensive and thoughtful discussion between Dr. Gil-Kashiwabara and Portland Revels leadership around the goals for the consultation, the importance of building on existing organizational strengths and IDEA work that had already begun within the organization, as well as consideration of the current areas of readiness within the organization. This involved examining both existing data and documents and designing an opportunity to collect new information using a complementary methodology. An additional and less formal opportunity for new data was built into the second deliverable (IDEA Training Series for Board and Staff) by examining the pre and post-training knowledge related to the learning objectives for each training.

These additional surveys helped confirm the baseline IDEA knowledge and commitment within the organization that was being determined through the analysis of the formal Needs Assessment data sources. It is worth noting that the areas of focus/deliverables of the consultation did have some overlap, informing and / or confirming each other.

The consultation highlighted a number of existing strengths within the organization, including a shared sense of community and inclusion for many community members, high quality programming, and a demonstrated desire to commit to IDEA goals.



The Portland Revels Recommended IDEA plan presented in this report by Dr. Gil-Kashiwabara, including short-term and long-term priorities and example indicators of success, provides a guiding pathway for the Portland Revels ongoing IDEA journey. The Recommended IDEA plan is grounded in anti-racism with an emphasis on dismantling white supremacy culture, which will support ongoing IDEA work from an intersectional framework as well as support future Portland Revels IDEA efforts focused on other systems of oppression.

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APPENDIX A

Example Organizational Readiness Assessment Tool 1

The following pages are excerpts from the Race Forward Puget Sound Cohort *Accountability Principles* (2019) and are an example of a readiness assessment tool that can be used as a resource to develop a baseline assessment of Portland Revels' readiness to move forward with implementing racial equity and IDEA work.

The full *Accountability Principles* document, including more detailed instructions for how to use the tool, can be accessed at:

https://facingrace.raceforward.org/sites/default/files/RaceForward_PugetSoundCohort_FINAL.pdf.

APPENDIX A

Excerpt from Example Organizational Readiness Assessment Tool 1*:

Racial Equity Within Your Organizational Practices

GOAL: Internal organizational practices influence the way an organization is able to advance racial justice. This section assesses the mission that drives the organization, the values that determine how an organization does its work, internal staff policies, and the practices that affect community at large. To have a true and lasting impact on racial equity, it is important for an organization's stated commitment to racial equity to be in alignment with internal organizational practices.

Scoring Guide:

- 1= Not a current practice
- 2= Acknowledged as important, but not a current practice
- 3= Practicing on occasion, or starting to practice
- 4= Practicing
- 5= Exemplary practice
- NA= Not Applicable

| Equity Readiness Indicator ² | Score | Avg Score | Explanation |
|---|-------|-----------|-------------|
| BE RACE EXPLICIT | | | |
| Does your organization understand why it's important to prioritize racial equity? | | | |
| Does your organization explicitly name your commitment to advancing racial equity, both in internal policies and external messaging? (Example of an explicit racial equity statement by the National Sustainable Agriculture Coalition) | | | |
| Does your organization understand the intersections of racial equity in every department, issue, project, and program? | | | |
| Do staff feel a sense of urgency in addressing racial disparities in your work? | | | |

(Continued on the following page.)

² Many indicators have been adapted from the [Bay Area Regional Health Inequities Initiative](#)

APPENDIX A

Excerpt from Example Organizational Readiness Assessment Tool 1*:

| ORGANIZATIONAL POLICIES, PRACTICES, AND PROCEDURES REFLECT A RACIAL EQUITY COMMITMENT | | | |
|--|--|--|--|
| Does your organization's staff, from leadership to frontline staff, represent the communities you serve? | | | |
| Does your organization utilize a racial equity toolkit or analysis to review policies, practices, and procedures on a regular basis (including, but not limited to: budgeting, programmatic efforts, communications, recruitment and hiring, human resources, development, etc.)? | | | |
| Does your organization have goals and metrics to track your progress towards racial equity? See Racial Equity Action Plan excerpt from Race Forward's work in the Puget Sound as an example | | | |
| FOSTER AN INCLUSIVE WORKPLACE CULTURE | | | |
| Do staff in every department and at every level of your organizational hierarchy feel valued and respected? | | | |
| Does your organization capture information about staff satisfaction (disaggregated by race) on a regular basis? | | | |
| Are staff able to embrace the full range of their identities when they come to work? (For example, does your organization give your employees the opportunity to observe holidays from all religions? Does your organization allow employees to flex their schedules for reasons they do not need to disclose?) | | | |
| Is there an opportunity for feedback from staff at all levels regarding programmatic direction and approach? | | | |
| What norms and ways of being does your organization prioritize, and do they actively interrupt white dominant culture? Use the Continuum on Becoming an Anti-Racist Multicultural Organization to assess where your organization sits on the continuum and to create goals for where you want to be within the next year | | | |

*https://facingrace.raceforward.org/sites/default/files/RaceForward_PugetSoundCohort_FINAL.pdf.

APPENDIX A

Excerpt from Example Organizational Readiness Assessment Tool 1*:

| PRIORITIZE PEOPLE OF COLOR-OWNED BUSINESSES FOR ORGANIZATIONAL CONTRACTING AND PURCHASING | | | |
|--|--|--|--|
| Does your organization prioritize contracting with vendors and partners led by people of color or with a mission related to racial equity? | | | |
| Do you routinely capture data (disaggregated by race) on who your organization contracts with? | | | |
| Is all contract language or RFP language explicit about your organization's commitment to racial equity? | | | |
| ADVANCE RACIAL EQUITY THROUGH ORGANIZATIONAL DECISION-MAKING | | | |
| Are organizational decision-making processes transparent and clear? | | | |
| Before an organizational decision has been made, is there space for conversation and questions from staff at all levels of the organization? | | | |
| Does the decision-making team ask the following questions on a routine basis: <ul style="list-style-type: none"> • What assumptions might we be making? • What power dynamics are at play? • How can we gain a more nuanced understanding of the issue at hand? • Whose perspectives are missing? • Who benefits and who is most burdened from this decision? | | | |
| When decisions are made, is there transparency regarding how and why the decision-maker(s) reached that outcome? | | | |

*https://facingrace.raceforward.org/sites/default/files/RaceForward_PugetSoundCohort_FINAL.pdf.

APPENDIX B

Example Organizational Readiness Assessment Tool 2

The following pages are excerpts from the Coalition of Communities of Color *Tool for Organizational Assessment Related to Racial Equity* (2014) and are provided as an example of a readiness assessment tool that can be used as a resource to develop a baseline assessment of Portland Revels' readiness to move forward with implementing racial equity and IDEA work.

The full *Tool for Organizational Assessment Related to Racial Equity* document, including more detailed instructions on how to use the tool, can be accessed at: <https://racc.org/wp-content/uploads/buildingblocks/foundation/CCC%20-%20Tool%20for%20Organizational%20Self-Assessment%20Related%20to%20Racial%20Equity.pdf>

APPENDIX B

Excerpt from Example Organizational Readiness Assessment Tool 2*:

STEP 1 ORGANIZATIONAL READINESS REFLECTION

Directions: Fill in the blanks with the number that best describes where your organization is in relation to the organizational characteristics and workforce competencies listed below. Then look at the reflections section for recommendations about next steps.

| Haven't started work in this area yet | Plans exists to use in planning and implementation | This is in place and we have evidence of its use | This is part of our routine, and we model it for others |
|---------------------------------------|--|--|---|
| (1) | (2) | (3) | (4) |

Organizational Characteristics:

1. ___ Institutional commitment to addressing/eliminating racial and ethnic inequities
2. ___ Hiring to address racial and ethnic inequities, prioritizing the hiring of employees who represent communities of color, immigrant and refugees
3. ___ Structure that supports authentic community partnerships that are empowering and more fluid than hierarchical
4. ___ Supporting staff to address racial and ethnic inequities
5. ___ Inclusive and culturally-responsive internal communications
6. ___ Institutional support for innovation to better meet the organization's mission
7. ___ Creative use of categorized funds that (supporting programs/policies vital to or disproportionately needed by particular disadvantaged racial/ethnic communities)
8. ___ Data and planning practices that are accessible to and, as appropriate, driven by community stakeholders, incorporating community narratives and experience.
9. ___ Effective and coordinated administrative processes

Workforce Competencies:

1. ___ Knowledge of racial equity components (e.g. public policy development, advocacy, data practices)
2. ___ Understanding of the social, environmental and structural determinants of racial and ethnic inequities
3. ___ Knowledge of affected community (can be developed by building and maintaining authentic relationships with communities of color, analysis of community-driven data, etc.)
4. ___ Courageous leadership that is consistent around applying a racial equity lens and understanding of power and privilege
5. ___ Community organizing and engagement skills (community organizing skills based on the principles and practices espoused by communities of color, immigrants and refugees)
6. ___ Problem-solving abilities
7. ___ Cultural responsiveness and humility

Reflections: If you notice that your answers tend toward the one and two range, we recommend that you next complete The First 20 Questions. If you notice that your answers tend toward the three and four range, we recommend that you next complete the entire Organizational Self-Assessment Tool.

*<https://racc.org/wp-content/uploads/buildingblocks/foundation/CCC%20-%20Tool%20for%20Organizational%20Self-Assessment%20Related%20to%20Racial%20Equity.pdf>

APPENDIX B

Excerpt from Example Organizational Readiness Assessment Tool 2*:

STEP 2 THE FIRST 20 QUESTIONS

Directions: Please answer the questions below. Put a "Y," "N" or "?" in the blank to indicate yes, no, I don't know.

Organizational Commitment, Leadership & Governance:

1. ___ Has your organization made a public commitment to racial equity?
2. ___ Does your organization have a mission statement that incorporates racial equity?
3. ___ Does your organization have an internal structure whose goal is to address issues of racial equity, for example an equity committee?
4. ___ Do you collect the racial, ethnic and linguistic makeup of your board?

Racial Equity Policies & Implementation Practices:

5. ___ Does your organization have a racial equity policy?
6. ___ Does your organization have a written racial equity plan with clear actions, timelines, people responsible for each action, indicators of progress and processes for monitoring and evaluation?

Organizational Climate, Culture & Communications

7. ___ Does your organization visibly post materials in languages other than English?

Service-Based Equity

8. ___ Do you collect racial, ethnic and linguistic data on your clients or constituents?
9. ___ Do you provide language interpreter/translator services for people who speak languages other than English?

Service-User Voice & Influence

10. ___ Do you collect data on service-user or constituent satisfaction with your organization regarding racial equity?

Workforce Composition & Quality

11. ___ Do you collect the racial, ethnic and linguistic makeup of your workforce?
12. ___ Does your organization have written procedures to increase the recruitment, retention and promotion of people of color?
13. ___ Does your organization have an internal structure or position dedicated to promoting workforce diversity?
14. ___ Are racial equity and cultural competency training and capacity building made available to your workforce?

Community Collaboration

15. ___ Does your organization have formal partnerships with organizations of color?
16. ___ Does your organization allocate resources for engagement and outreach in communities of color?

Resource Allocation & Contracting Practices

17. ___ Does your organization have a Minority, Women & Emerging Small Business (MWESB) policy?
18. ___ Does your organization routinely collect data on MWESB utilization?

Data, Metrics & Continuous Quality Improvement

19. ___ Does your organization have a written policy or formal practice regarding the collection of race and ethnicity data?
20. ___ Does your organization meet regularly with leaders from communities of color specifically to discuss racial equity within your organization?

*<https://racc.org/wp-content/uploads/buildingblocks/foundation/CCC%20-%20Tool%20for%20Organizational%20Self-Assessment%20Related%20to%20Racial%20Equity.pdf>

APPENDIX B

Excerpt from Example Organizational Readiness Assessment Tool 2*:

STEP 3

Directions: Please answer the questions below. Put a “Y,” “N” or “?” in the blank to indicate yes, no, I don’t know.

Organizational Commitment, Leadership & Governance:

1. ___ Is advocacy on behalf of racial equity seen as part of the organization’s work?
2. ___ Does the organization have a systematic review of racial equity? (Refers to a planned and periodic gathering of facts and governing body discussion with community participation regarding the implications of the facts for the organization).

Racial Equity Policies & Implementation Practices:

3. ___ If you have developed, or are developing, a written racial equity policy and/or plan, were representatives, or are representatives, from communities of color participants in development?

Organizational Climate, Culture & Communications

4. ___ Are there visible signs of your organization’s commitment to racial equity in your primary physical location, e.g. signage that states your commitment and/or physical representation of diverse communities?
5. ___ Do you encourage or support difficult conversations about race in a safe, confidential, private space?
6. ___ Are organizational materials assessed for racial bias and reviewed to ensure reflection of your community’s diversity?

Service-Based Equity

7. Do you collect race and ethnicity data on each of the following:
 - ___ those who request service
 - ___ those who receive service
 - ___ those referred for specific interventions
 - ___ those who succeed and those who don’t in your programs/services/schools?
8. ___ When you make evidence-based decisions regarding communities of color (either collectively or as individual communities) do you review the decision with the impacted community?

Service-User Voice & Influence

9. ___ If you collect data on service-user or constituent satisfaction with your organization regarding racial equity, do you share the findings with communities of color?

Workforce Composition & Quality

10. ___ Are racial justice knowledge, skills and practices incorporated into performance objectives (such as job descriptions and work plans) and appraisals/evaluations for staff?
11. ___ Do performance appraisals/evaluations include progress on racial equity and cultural competency goals?
12. ___ Are there effective formal and informal complaint procedures for staff regarding race-related complaints?
13. ___ Is your organization unionized?
14. ___ If you are subject to Title VI (which prohibits discrimination on the basis of race, color, and national origin in programs and activities receiving federal financial assistance), has the federal government ever found your organization non-compliant?
15. ___ Are racial equity and cultural competency training voluntary or mandatory?
16. ___ Do communities of color in your area participate in the development and evaluation of racial equity and/or cultural competency trainings available for your staff?

Community Collaboration

*<https://racc.org/wp-content/uploads/buildingblocks/foundation/CCC%20-%20Tool%20for%20Organizational%20Self-Assessment%20Related%20to%20Racial%20Equity.pdf>

APPENDIX B

Excerpt from Example Organizational Readiness Assessment Tool 2*:

17. ____ Do you have a method in place to assess the overall satisfaction of communities of color with your organization?

Resource Allocation & Contracting Practices

18. ____ If your organization has equity practices and policies, do you require your vendors and contractors to adhere to the same practices and policies?

Data, Metrics & Continuous Quality Improvement

19. ____ If you collect race and ethnicity data (either workforce or constituency), are you able to disaggregate your data into the following communities: African, African American, Asian, Pacific Islander, Latino, Native American and Slavic?

20. ____ If you collect race and ethnicity data, are individuals able to self-identify their race and ethnicity?

21. ____ If you collect race and ethnicity data, are individuals allowed to designate multiple races and/or ethnicities?

22. ____ Do you reveal race and ethnicity data in a way that is accessible to your staff?

23. ____ Do you reveal race and ethnicity data in a way that is accessible to the public?

*<https://racc.org/wp-content/uploads/buildingblocks/foundation/CCC%20-%20Tool%20for%20Organizational%20Self-Assessment%20Related%20to%20Racial%20Equity.pdf>

APPENDIX C

Example Organizational Equity Assessment Tool 1


The following page is an excerpt from The Annie E. Casey Foundation *Race Matters: Organizational Self-Assessment* (2006)* and is an example of a brief organizational assessment tool that can be used as a resource to develop a baseline assessment of Portland Revels' culture and practices related to IDEA. The tool can be revisited on a scheduled basis for reevaluation.

The full *Race Matters: Organizational Self-Assessment* document, including more detailed instructions for how to use the tool, can be accessed at:


<https://assets.aecf.org/m/resourcedoc/aecf-RACEMATTERSorgselfassessment-2006.pdf>

APPENDIX C

Excerpt from Example Organizational Equity Assessment Tool 1*:



RACE



matters

ORGANIZATIONAL SELF-ASSESSMENT¹

Why Should I Use This Tool?
Because unequal opportunities and racial inequity are deeply embedded and usually not intended, producing equitable opportunities, operations and results requires being intentional.

What Will the Tool Accomplish?
It raises organizational awareness, starts focused conversations, contributes to the development of equity action plans, and tracks organizational change. Organizations that care about these issues can produce early results by using this tool.

How Do I Use It?

- Answer each question by circling the response that most closely applies. (For the section on staff competencies, decide if your focus is your own unit or the entire organization.)
- Add up the numbers associated with each answer to get your Racial Equity Score.
- Use the chart at the end of the tool to find out what your Racial Equity Score means for your next steps.

| STAFF COMPETENCIES | ORGANIZATIONAL OPERATIONS |
|--|---|
| <p>1. Staff are trained in and are knowledgeable at the 101 level about the range of barriers to equal opportunity and the depth of embedded racial inequities²—how they are produced and how they can be reduced.</p> <p>0=None 1=Some 2=Almost All 3=All</p> <p>2. Staff have a deep level of understanding about barriers to opportunity and embedded racial inequities in their special area of focus—including critical data and information about how inequities are produced and how they can be reduced.</p> <p>0=None 1=Some 2=Almost All 3=All</p> <p>3. Staff are comfortable and competent about discussing issues of barriers to opportunity and embedded racial inequities with relevant individuals and groups.</p> <p>0=Rarely 1=Sometimes 2=Almost Always 3=Always</p> <p>4. Staff exhibit cultural competence in interactions with diverse groups.</p> <p>0=None 1=Some 2=Almost All 3=All</p> <p>5. Staff disaggregate data by race in all analyses.</p> <p>0=Rarely 1=Sometimes 2=Almost Always 3=Always</p> <p>6. A racial equity analysis is applied to policy issues.</p> <p>0=Rarely 1=Sometimes 2=Almost Always 3=Always</p> <p>7. A racial equity analysis is applied to practice issues.</p> <p>0=Rarely 1=Sometimes 2=Almost Always 3=Always</p> <p>8. Written materials reflect a knowledge and understanding of barriers to opportunity and embedded racial inequities.</p> <p>0=None 1=Some 2=Almost All 3=All</p> <p>9. Staff can articulate the costs of failing to address barriers to opportunity and embedded racial inequities.</p> <p>0=None 1=Some 2=Almost All 3=All</p> | <p>1. Removing barriers to opportunity and disparity/disproportionality reduction are explicit goals of the work and are articulated in a mission/vision statement.</p> <p>0=No 1=Moving In That Direction 2=Yes</p> <p>2. The unit has an internal team that guides the ongoing work of removing barriers to opportunity and reducing racial disparity/disproportionality.</p> <p>0=No 1=Moving In That Direction 2=Yes</p> <p>3. The organization's goals of reducing barriers to opportunity and racial disparities/disproportionality are reflected in resource allocations.</p> <p>0=No 1=Moving In That Direction 2=Yes</p> <p>4. Investments promote capacity-building and asset building for people and communities of color.</p> <p>0=Rarely 1=Sometimes 2=Almost Always 3=Always</p> <p>5. Results of investments show opportunity for all and a reduction in racial disparities/disproportionality.</p> <p>0=Rarely 1=Sometimes 2=Almost Always 3=Always</p> <p>6. The organization has a deliberate plan to develop and promote the leadership of staff of color.</p> <p>0=No 1=Moving In That Direction 2=Yes</p> <p>7. The organization has regular trainings and discussions at the staff and/or board levels about removing barriers to opportunity and reducing racial disparities and disproportionality, both internally and externally.</p> <p>0=No 1=Moving In That Direction 2=Yes</p> <p>8. The organization regularly assesses workforce composition by race/ethnicity and develops/implements strategies for increasing diversity at all levels.</p> <p>0=No 1=Moving In That Direction 2=Yes</p> <p>9. The environment of the organization (food, art, holiday activities, etc.) is multicultural.</p> <p>0=No 1=Moving In That Direction 2=Yes</p> <p>10. The organization has a mechanism in place to address complaints about barriers to opportunity and racial inequities in the workplace.</p> <p>0=No 1=Moving In That Direction 2=Yes</p> |

NOW: Add up the numbers associated with each answer to get your Racial Equity Score.
My Racial Equity Score is _____.
FINALLY: Use the chart below to see what your next steps should be.

| RACIAL EQUITY SCORE | NEXT STEPS | TOOLS THAT CAN HELP |
|---------------------|--|--|
| <20 | <p>Become intentional Make an emphasis on racially equitable results explicit in your unit's/organization's mission statement, and evaluate performance with this emphasis as a criterion.</p> | <p>Every tool in this Toolkit can help your organization become more intentional in its commitment to opportunity for all. But you may want to start with How to Talk about Race to decide HOW to talk about the issues. Sometimes organizations do not have intentional efforts to produce equity because they get stuck on debates related to language instead of action. You should also review the Race Matters PowerPoint to understand how becoming intentional changes the work you do.</p> |
| 20-29 | <p>Build staff/organizational capacity If fewer points are in the area of Staff Competencies, identify opportunities for staff to better understand embedded racial inequities – how they are produced and maintained, and how they can be eliminated.</p> <p>If fewer points are in the area of organizational operations, identify policies and procedures that should be improved to promote racially equitable results.</p> | <p>Staff competencies can be built using the Race Matters PowerPoint, What's Race Got to Do with It?, and the Fact Sheets.</p> <p>Organizational operations can be improved with the Racial Equity Impact Analysis and System Reform Strategies.</p> |
| 30-39 | <p>Fine-tune staff/organizational capacity See which items are scored lowest, and work on them.</p> | <p>Select relevant tools from the Toolkit based on the areas that need fine-tuning. To help you select the right tools, the Race Matters Users Guide lists every tool and what it will accomplish.</p> |
| 40-49 | <p>Mentor others! Because one unit's or organization's success in promoting opportunity for all and reducing disparities is likely to be tied to others' performance, use what you've learned to help advance a racial equity approach for critical partners.</p> | <p>You are in a good position to go deeper on the issues by creating your own tools specific to your content area. The easiest place to start is by developing a Fact Sheet.</p> |

*<https://assets.aecf.org/m/resourcedoc/aecf-RACEMATTERSorgselfassessment-2006.pdf>

APPENDIX D

Example Organizational Equity Assessment Tool 2

The following pages are an excerpt from Meyer Memorial Trust *Diversity, Equity, Inclusion (DEI) Spectrum Tool* (2018) and are an example of a brief organizational assessment tool that can be used as a resource to develop a baseline assessment of Portland Revels' culture and practices related to IDEA. The tool can be revisited on a scheduled basis for reevaluation.

The full *DEI Spectrum Tool* document, including more detailed instructions for how to use the tool, can be accessed at: <https://mmt.org/news/understanding-meyers-dei-spectrum-tool>

APPENDIX D

Excerpt from Example Organizational Equity Assessment Tool 2*:



The Diversity, Equity and Inclusion (DEI) Spectrum Tool helps assess where an organization is on its DEI journey and to identify potential areas for future work.

The tool describes organizational components at different points along the DEI continuum for twelve different dimensions of DEI work:

| | | | |
|------------|----------------|-----------|----------------|
| DEI Vision | Policies | Diversity | Decisions |
| Commitment | Infrastructure | Data | Accountability |
| Leadership | Training | Community | Inclusion |

DEI is a complex process, and every organization's DEI journey is unique.

The scale focuses on five points along the DEI continuum – "Not Yet Started," "Ready to Start," "Launched," "Well on the Way," and "Exemplary/Leading" – but few organizations' DEI experiences will fit neatly into these stages.

The descriptions of organizational characteristics at each point in the process are intended to serve as guideposts rather than fixed stages. Users are encouraged to place a dot on the arrow underneath each DEI dimension to indicate where the organization is on the continuum in relation to the guideposts.

*<https://mmt.org/news/understanding-meyers-dei-spectrum-tool>

APPENDIX D

Excerpt from Example Organizational Equity Assessment Tool 2*:

| DEI Component | Not Yet Started | Ready to Start | Launched | Well on the Way | Exemplary or Leading |
|-----------------------|--|---|---|--|---|
| DEI Vision | Does not see DEI as relevant to its work | Recognizes the importance of DEI to its work and is contemplating its next steps | Recognizes the importance of DEI to its work and is in the process of developing a shared DEI vision | Has developed a shared DEI vision and is working to align the organization's programs and operations with this vision | Has integrated DEI in organizational mission and vision statements which are actively being used to guide the organization's programs and operations. |
| Commitment | Does not have an interest in advancing its DEI work | Is interested in advancing its DEI work and is considering how to do so | Is interested in advancing its DEI work and has put some strategies or actions in motion | Is actively engaged in advancing its DEI work | A commitment to DEI is fully institutionalized throughout the organization both internally and externally |
| Leadership | Members of management, staff or board have not taken leadership on DEI issues | A few members of management, staff, or board are leading the DEI discussion | A DEI point person or team is leading the organization's DEI work | All levels of management, staff and board are taking leadership on DEI issues | Organization is a DEI leader and is helping to build the field and best practices; leadership demonstrates accountability to clients, constituents, stakeholders |
| Policies | Does not have any DEI-related organizational policies (beyond non-discrimination policies) | Does not have, but is interested in developing DEI-related organizational policies (beyond non-discrimination policies) | May have some DEI-related language in some of its organizational policies | Has DEI policies and/or an organizational DEI plan but may be unclear about how to operationalize it | Has DEI policies and an organizational DEI plan with clear goals, strategies and indicators of progress |
| Infrastructure | Has not had internal discussions about the organization's DEI work | Has had some internal DEI discussions, but doesn't have an infrastructure to guide the organization's DEI work | Individuals or small groups are guiding internal DEI discussions but aren't integrated into the organization as a whole | Has internal committees, affinity groups or other formal structures focused on integrating DEI issues into the organization's work | Work on DEI issues is integrated into every aspect of organizational culture and infrastructure |
| Training | Has not done any training related to DEI | Is contemplating doing organizational DEI training; individual staff may have done some initial training | Some staff or board have participated in DEI-related training | All management, staff and board are involved in DEI training and capacity building | Fosters ongoing DEI training, growth and leadership among management, staff and board in line with an equity plan/strategy; staff are held accountable to DEI-related practices |

*<https://mmt.org/news/understanding-meyers-dei-spectrum-tool>

APPENDIX D

Excerpt from Example Organizational Equity Assessment Tool 2*:

| DEI Component | Not Yet Started | Ready to Start | Launched | Well on the Way | Exemplary or Leading |
|-----------------------|--|--|---|---|--|
| Diversity | Doesn't see diversification of board and staff as a priority; may be paralyzed by the perceived challenges or view it as unattainable | Has had initial discussions about and values the idea of diversifying its board and staff | Beginning attempts to diversify its board and/or staff but may not know how to do it effectively or have strategies and systems in place; may not result in growing diversity | Actively works to increase diversity of board and staff, resulting in growing diversity; has begun to identify and institute retention strategies for diverse staff | Has policies and strategies for strengthening and maintaining organizational diversity; staff and board represent the diversity of the community it serves; effective retention strategies are implemented |
| Data | Does not collect demographic data in its programmatic or operational work | Does not collect demographic data in its programmatic or operational work, but views this as a future goal | Collects some demographic data in its programmatic or operational work, but not in a systematic or comprehensive way | Collects and disaggregates comprehensive demographic data in its programmatic and operational work but may not know what to do with the information | Collects and disaggregates comprehensive demographic data in its programmatic and operational work but may not know what to do with the information |
| Community | Doesn't express interest in building stronger partnerships with communities facing disparities; may see it as unrealistic or unimportant to the organization's mission | Values the idea of building partnerships with communities facing disparities, but may not know how or have relationships to draw upon | Is beginning to build partnerships with communities facing disparities but has not yet established accountability to and meaningful partnerships with these communities and may approach it in a tokenistic way | Actively works to build partnerships and trust with communities facing disparities; working to understand how to provide value and support to these communities | Has strong, mutually beneficial, accountable and equitable partnerships with diverse organizations and leaders from communities facing disparities |
| Decisions | DEI considerations do not factor into decision-making | Interested in factoring DEI considerations into decisionmaking, but may view it as an option or an add-on to core decision-making considerations | Decisions are occasionally influenced by DEI considerations in an ad hoc way | Decisions regarding organizational policies, practices and resource allocation are informed by DEI considerations | Decisions regarding organizational policies, practices and resource allocation are systematically guided by DEI considerations |
| Accountability | DEI-related metrics are not included in evaluations of staff or programs or in organizational accountability mechanisms | May recognize the value of including DEI-related metrics in evaluations of staff or programs or in organizational accountability mechanisms, but has not made any plans to do so | Is preparing to include or is currently including DEI-related metrics in a few aspects of the organization, such as staff and/or board representation or evaluations of specific projects | Some of the organization's standard evaluation and accountability mechanisms include DEI-related metrics | All evaluation and accountability mechanisms for the organization, its projects, programs, management, staff and board include specific DEI-related metrics |

*<https://mmt.org/news/understanding-meyers-dei-spectrum-tool>



INCLUSION DIVERSITY EQUITY AND ACCESSIBILITY (IDEA) CONSULTATION REPORT

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