

Racial **Equity** Institute

www.racialequityinstitute.org

Hosting Guide

2023

Organizing for and Hosting Racial Equity Institute Services

The following are important guidelines for organizations or communities that wish to engage in services offered by REI. REI Administration is happy to assist in guiding you through the following process. Please carefully read through the following and discuss with your team before emailing questions or requesting a call.

I. Is your agency or community ready for an REI Service?

-Organizing your agency or community -

Step 1: Identify the Goals and Choose the Service

- Consider why you want to bring a Racial Equity Institute Service to your organization or community. What are your goals for hosting the service?
- Though they can also serve as an early step towards building collaboration, REI's services are most useful as an organizing tool or a piece of a larger commitment toward achieving racial equity in your organization and should not be approached as a one-off or education in a silo.
- Discern which service best meets your goals (read more about current offerings in the "Our Approach and Our Services" manual, or on REI's website: www.racialequityinstitute.org)

Step 2: Identify Your Constituency - Who is the Service For?

- Would the service be specifically intended for members of your organization? If so, will participants be invited, urged, or required to attend?
- Would offering this service be a cooperative effort, involving two or more organizations, communities, agencies, etc.? If so, what segments of the community will you work to have represented? In most circumstances, REI recommends inclusion of a certain number of spaces for constituents or key partners.
- How will you ensure racial diversity? Whenever possible, REI workshops and presentations are done in racially mixed settings. Exceptions are made only in certain circumstances and with prior agreement with REI.

Step 3: Assessment of Interest

- Can you generate sufficient interest in the workshop in your organization or community? What is your strategy? What is your back-up strategy?
- Do you need to send a few members to a Phase 1 or Groundwater Presentation in a different location to prepare them to help organize?

Step 4: Assess Agency Readiness to Host

- It is a requisite that **someone from the host agency** is available to meet with the assigned Trainers 30 minutes prior to the service and **will stay the whole time**.
- For Virtual Services, it is a **requirement** for each participant to have a **working video camera and working audio** to participate. For successful 2-day Phase 1 workshops and Youth Workshops, it is imperative that participants understand their commitment is **to stay on the whole time** of the service, with their **cameras on**. The Groundwater Approach is a presentation and cameras are not needed in webinar mode.
- REI's services are education-based, and we believe solutions are contained in understanding the problem, or as we say, "diagnosis determines treatment." The lack of identification of solutions stems from misidentifying causal factors, not being unaware of next steps. Therefore, it is necessary for agency organizers to ensure participants understand this when registering for the services and have ways for participants to engage with the agency point of contact and each other after the services are complete. REI's Administration is available to discuss strategy and ways to plan for this ahead of your services.
- Trauma is real. It is our job to prevent and end it. It is not our job to treat it. We are not therapists; we are not here to work out personal problems or issues during workshops. We are here, however, to share with participants the information we believe important to become problem solvers so that participants might take their place in the movement for racial justice. Please ensure this is understood by registrants ahead of any service.
- Will you need to register participants? Collect and handle registration fees? Develop a plan for how you will do this and who will do this?

Step 5: Assess Organizational Finances

- Is your organization prepared to fund, raise funds, write a grant, or charge fees to cover costs associated with the service? Typically, organizations will cover costs in one of three ways: 1) the hosting organization covers all costs, 2) multiple groups come together to cover the costs, 3) community members are encouraged to register as individuals and pay a fee to participate.

Step 6: Request a Date

- To request the date(s) you desire, follow the steps in section III. "How to Book a Service"
- All service requests must be confirmed by our Managing Director.

- REI continues to book virtual services. If you are interested in an in-person service, please indicate this in the notes section of the Appointments Plus platform. REI is working to accommodate in-person requests in 2023 based on the location, and availability of Trainers given of our current virtual schedule with at least a 3-month advance request. Travel and accommodation costs will be added to the base cost of the service and will be specific to your location*.

II. Current Service Offerings: Participants, Costs & Host Preparation

1. The Phase 1 Workshop (2 full days, typically from 9am to 5pm, both days)

Virtual Workshops

Participants:

The virtual presentation is capped at a firm 35 participants and requires a **minimum of 15** to maximize engagement.

Workshop Costs:

The fee for a two-day, virtual Phase I Workshop is:

- Corporate - \$20,000
- Institution - \$15,000
- Community- \$12,000

In-Person Workshops

Participants:

The In-Person Workshop can accommodate up to 40 participants. The ideal size is 35-40.

Workshop Costs:

The fee for a two-day, In-Person Phase I Workshop is:

- Corporate - \$21,500*
- Institution - \$16,500*
- Community- \$13,500* the designation of “Community” is for people who organize Workshops in their local communities. A discounted rate is offered to help build your local capacity.

*Plus travel expenses for 2-4 Trainers.

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

- Round-trip transportation to and from the workshop site: This includes airfare and ground transportation. We always work to keep this cost as low as possible.
- Lodging and other direct costs: Private hotel accommodations, food, and other reasonable expenses associated with travel. We will work within guidelines as required for state agencies, etc.

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

Workshop Site: This workshop requires a large meeting room that will hold 40-44 people comfortably seated in a circle. This includes the Trainers.

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

Host Preparation for Phase 1, 2-Day Workshops

1) Be sure all Participants are aware of the following:

- The basic commitment they are making. All Participants should be aware that we will be talking about how to examine and address current day racial inequity and that *they are expected to stay for the entire Workshop.*
- The hours for the Workshop (i.e.: 9am to 5pm, both days): we do not supply an agenda, just a general idea about start and stop times and that lunch and breaks will be provided. We move with the pace of the group and respect the development of the group's process. Some groups move more quickly and if this is the case with yours, it should not be a surprise to end at an earlier time. Please be aware, your agency is buying the content and the process, not the hours.
- Participants should prepare to be comfortable. Because room temperatures may vary, we advise people to always dress in layers. You may also want to let people know that may bring a cushion, a special chair, or any other items to facilitate their comfort or well-being during the two days.
- Participants should bring paper and pen to take notes.
- Electronic devices are permitted for note taking and a brief "web search" activity. Otherwise, we ask that people refrain from using such devices during the workshop. Breaks and lunch allow participants time for electronic communications.

2) Prepare the space with the following:

- Ability to set up ~40-44 chairs in a circle (as per your expected attendance), with an easel situated in between the Trainers' seats and a chair-length between Trainers and participants' seats. There should be no desks or tables in front of the chairs. Workshop "**alumni**" (previous participants) are encouraged to come back. We ask that they be seated in an outer row, **as listeners/observers** and not active Workshop participants (reserving this experience for first timers). **Alumni who want to fully participate** need to register as a participant, pay/host agency will pay (their seat will be counted as a first-time participant), and we ask that they respect the process, allowing space for first timers to recognize and realize answers and share them before putting the answer out they have previously heard in their first or a prior Workshop.
- Wheelchair accessibility.
- Ability to maintain a comfortable temperature.
- Space to post a dozen or more newsprint sheets from the easel pad around the room.

- Limited noise distractions (e.g., phones, fans, kitchens, traffic, music, other activities).
- Audio-visual capability: we will need a projector with internet access and audio capability for a documentary clip.

3) Have the following supplies on hand:

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

4) Prepare volunteers or staff to manage additional tasks and supplies (as needed). Other tasks might include:

- Representative from host site to introduce the workshop and Trainers
- Registration and check-in
- Water, coffee, snack, and meal service
- Volunteer host(s) who can troubleshoot any problems that arise during the workshop
- Map/directions for participants and Trainers
- Accommodations for participants who are traveling (including parking)
- Special needs accommodations
- Childcare (optional)

5) After the Workshop:

We will send you a copy of post-Workshop materials at the same time we send the invoice. It is your responsibility to distribute these to your Participants.

2. **The Phase 1 Workshop Debrief** (6 hours, held from either 9am-3pm EST, 10am-4pm EST, 11am-5pm EST, or 12pm-6pm PST.)

WORKSHOP COSTS:

Virtual Debrief

For a one-day **virtual** Phase 1 Workshop Debrief, the fee structure is as follows:

- Corporate: \$10,000
- Institution: \$7,500
- Community: \$6,000

In-Person Debrief

For **in-person**, the maximum capacity is 40 participants, with an ideal size of 35-40. The fee structure for a one day in-person Phase 1 Debrief is as follows:

- Corporate: \$10,750*

- Institution: \$8,250*
- Community: \$6,750*

The "Community" designation is for individuals who organize debriefs in their local communities. We offer a discounted rate to help build local capacity. *Please note that travel expenses for 2-4 trainers are not included in the fee.

3. Groundwater Approach Presentation (3 hours, typically 9am-12pm or 1pm-4pm)

Virtual Groundwater Presentation

Participants:

The virtual presentation is capped at 100 participants. Only one participant per registration. To add more participants, please contact us for approval. Additional charges will apply.

Presentation Costs:

The fee for a virtual Groundwater Presentation is:

- Corporate - \$8500
- Institution - \$7000
- Community- \$5000

In-Person Groundwater Presentation

Participants:

The In-Person Groundwater Presentation is capped at 100 participants. To add more participants, **or for a conference presentation** please contact us for approval. Additional charges will apply.

Presentation Costs:

The fee for an In-Person Groundwater Presentation is:

- Corporate - \$9000*
- Institution - \$7500*
- Community- \$5500* the designation of "Community" is for people who organize Presentations in their local communities. A discounted rate is offered to help build your local capacity.

*Plus travel expenses for a minimum of 2 Trainers.

Trainer Expenses: A Groundwater Presentation requires a minimum of two, and up to three Trainers. REI will determine team composition based on the needs of your organization. Hosts are responsible for covering Trainer expenses including:

- Round-trip transportation to and from the workshop site: This includes airfare and ground transportation. We always work to keep this cost as low as possible.
- Lodging and other direct costs, if applicable: Private hotel accommodations, food, and other reasonable expenses associated with travel if the timing of your service requires an overnight stay. We will work within guidelines as required for state agencies, etc.

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

Host Preparation for Groundwater Presentation

1) Be sure all participants are aware of the following:

- The basic commitment they are making. All participants should be aware that we will be talking about how to examine and address current day racial inequity, and that they are expected to stay for the entire Presentation.
- The hours of the Presentation (i.e.: 9am to 12pm).
- Participants should prepare to be comfortable. Because room temperatures may vary, we advise people to dress in layers. You may also want to let people know that may bring a cushion, a special chair, or any other items to facilitate their comfort or well-being during the Presentation.
- Participants may want to bring paper and a pen to take notes.

2) Prepare the space with the following:

- Groundwater Presentations can accommodate a variety of seating arrangements, depending on the number of participants. Smaller numbers (45 or fewer) can be seated in a circle or at tables. Larger numbers can be seated theater-style or at tables in a large space.
- Participants need to be able to view a PowerPoint presentation.

3) Prepare the Following Equipment and Supplies:

- **Audio-visual:** Presenters need a projector and screen for a slide presentation. Arrangements can be made ahead of time regarding laptop or thumb drive. Audio is not necessary.
- **Registration and Check-in:** Depending on your circumstances you may need check-in sheets, capability to receive Participant payments, and name tags.
- **Refreshments:** At a minimum, hosts should provide a sufficient supply of water and perhaps some coffee and tea. We will take a break in the middle of the Presentation. The host may decide whether to offer additional refreshments for participants.

4. **Groundwater Presentation: Asian Americans** (3 hours, typically 9am-12pm or 1pm-4pm)

A standard REI Groundwater Presentation is recommended before attending a Groundwater Presentation: Asian Americans.

Virtual Groundwater Presentation: Asian Americans

Participants: The virtual presentation is capped at 100 participants. Only one participant per registration. To add more participants, please contact us for approval. Additional charges will apply.

Presentation Costs: The fee for a virtual Groundwater Presentation is:

- Corporate - \$8500
- Institution - \$7000
- Community- \$5000

In-Person Groundwater Presentation: Asian Americans

Participants:

The In-Person Groundwater Presentation is capped at 100 participants. To add more participants, or for a conference presentation please contact us for approval. Additional charges will apply.

Presentation Costs:

The fee for an In-Person Groundwater Presentation is:

- Corporate - \$9000*
- Institution - \$7500*
- Community- \$5500* the designation of “Community” is for people who organize Presentations in their local communities. A discounted rate is offered to help build your local capacity.

*Plus travel expenses for a minimum of 1 trainer.

Trainer Expenses:

A Groundwater Presentation: Asian Americans requires a minimum of one, and up to two Trainers. REI will determine team composition based on the needs of your organization. Hosts are responsible for covering Trainer expenses including:

- Round-trip transportation to and from the workshop site: This includes airfare and ground transportation. We always work to keep this cost as low as possible.
- Lodging and other direct costs, if applicable: Private hotel accommodations, food, and other reasonable expenses associated with travel if the timing of your service requires an overnight stay. We will work within guidelines as required for state agencies, etc.

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

Host Preparation for Groundwater Presentation: Asian Americans

1) Be sure all participants are aware of the following:

- The basic commitment they are making. All participants should be aware that we will be talking about how to examine and address current day racial inequity, and that they are expected to stay for the entire Presentation.
- The hours of the Presentation (i.e.: 9am to 12pm).

- Participants should prepare to be comfortable. Because room temperatures may vary, we advise people to dress in layers. You may also want to let people know that they may bring a cushion, a special chair, or any other items to facilitate their comfort or well-being during the Presentation.
- Participants may want to bring paper and a pen to take notes.

2) Prepare the space with the following:

- **Groundwater Presentation:** Asian Americans can accommodate a variety of seating arrangements, depending on the number of participants. Smaller numbers (45 or fewer) can be seated in a circle or at tables. Larger numbers can be seated theater-style or at tables in a large space.
- Participants need to be able to view a PowerPoint presentation.

3) Prepare the Following Equipment and Supplies:

- **Audio-visual:** Presenters need a projector and screen for a slide presentation. Arrangements can be made ahead of time regarding laptop or thumb drive. Audio is not necessary.
- **Registration and Check-in:** Depending on your circumstances you may need check-in sheets, capability to receive Participant payments, and name tags.
- **Refreshments:** At a minimum, hosts should provide a sufficient supply of water and perhaps some coffee and tea. We will take a break in the middle of the Presentation. The host may decide whether to offer additional refreshments for participants.

5. **Youth Workshop** (2 days, typically 5 hours each day, i.e., 10am to 3pm, both days)

Virtual Youth Workshop

Participants:

The virtual workshop can accommodate up to 35 participants.

Workshop Fee:

The fee for a virtual Youth Workshop is \$12,000.

In-Person Youth Workshop

Participants:

The In-Person Youth Workshop can accommodate up to 40 participants. The ideal size is 35-40.

Workshop Fee:

The fee for an In-Person Youth Workshop is \$13,500.*

*Plus travel expenses for 2-4 Trainers.

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

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

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

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

Workshop Site: This Workshop requires a large meeting room that will hold 40-45 people comfortably seated in a circle. This includes the Trainers.

Meals: We recommend that continental breakfasts, simple lunches, and snacks be provided at the site. Meal expenses can vary greatly depending upon the resources, needs and interests of the group. At a minimum, hosts should provide a sufficient supply of water and other appropriate beverages.

Host Preparation for a Youth, 2-Day Workshop

1) Be sure all Participants are aware of the following:

- The basic commitment they are making. All Participants should be aware that we will be talking about how to examine and address current day racial inequity and that *they are expected to stay for the entire Workshop.*
- The hours for the Workshop (i.e.: 10am to 3pm, both days): we do not supply an agenda, just a general idea about start and stop times and that lunch and breaks will be provided. We move with the pace of the group and respect the development of the group's process. Some groups move more quickly and if this is the case with yours, it should not be a surprise to end at an earlier time. Please be aware, your agency is buying the content and the process, not the hours.
- Participants should prepare to be comfortable. Because room temperatures may vary, we advise people to always dress in layers. You may also want to let people know that may bring a cushion, a special chair, or any other items to facilitate their comfort or well-being during the two days.
- Participants should bring paper and pen to take notes.
- Electronic devices are permitted for note taking and a brief "web search" activity. Otherwise, we ask that people refrain from using such devices during the Workshop. Breaks and lunch allow participants time for electronic communications.

2) Prepare the space with the following:

- Ability to set up ~40-44 chairs in a circle (as per your expected attendance), with an easel situated in between the Trainers' seats and a chair-length between Trainers and participants' seats. There should be no desks or tables in front of the chairs. Workshop "alumni" (previous participants) are encouraged to come back. We ask that they be seated in an outer row, as listeners/observers and not active Workshop participants (reserving this experience for first timers). Alumni who want to **fully participate** need to register as a participant, pay/host agency will pay (their seat will be counted as a first-time participant), and we ask that they respect the process, allowing space for first timers to recognize and realize answers and share them before putting the answer out they have previously heard in their first or a prior Workshop.
- Wheelchair accessibility.

- Ability to maintain a comfortable temperature.
- Space to post a dozen or more newsprint sheets from the easel pad around the room.
- Limited noise distractions (e.g., phones, fans, kitchens, traffic, music, other activities).
- Audio-visual capability: we will need a projector with internet access and audio capability for a documentary clip.

3) Have the following supplies on hand:

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

4) Prepare volunteers or staff to manage additional tasks and supplies (as needed). Other tasks might include:

- Representative from host site to introduce the Workshop and Trainers
- Registration and check-in
- Meal, coffee, and snack service
- Volunteer host(s) who can troubleshoot any problems that arise during the Workshop
- Map/directions for participants and Trainers
- Accommodations for participants who are traveling (including parking)
- Special needs accommodations
- Childcare (optional)

5) After the Workshop:

We will send you a copy of post-Workshop materials at the same time we send the invoice. It is your responsibility to distribute these to your Participants.

III. How to Book a Service

1. Follow the "BOOK NOW" link on our website: www.racialequityinstitute.org
2. Complete a profile in the "Appointments Plus" system. Save and remember your login credentials to access your services and profile at any time. Please complete the profile entirely; include both first and last names and provide any additional details of your company that you would like us to know in the special instructions. You can request a custom time outside of our standard times by including any custom times in the special requests. Please also list this time in the time zone box and be sure to indicate the time zone even if you are in the Eastern Time Zone. We will honor your request unless otherwise noted on the confirmation email. Please keep in mind that the booking system is still going to show your time as the original time you selected but we will schedule you for the time you indicate in the

time zone and special request boxes. We will also confirm this in the notes section of the confirmation email.

3. Upon successful submission of a request, you will receive an automated email stating your request was received and that we will be in touch shortly with a response. Requesting an appointment does not signify confirmation.
4. If confirmed, you will receive an additional confirmation email with the next steps.
5. If we cannot confirm your request, we will notify you as soon as we know so you can reschedule or cancel. Should you need a response before we are able to respond to your request, please feel free to contact us via email at tafrisby@racialequityinstitute.org or by phone at 336-582-0351.
6. Booking System Tips:
 - a. When booking a Phase I, it may appear that we have weekday openings because the system does not realize that we require the Phase I workshops to be scheduled on two consecutive days. You must find two consecutive weekdays.
 - b. To find the most accurate availability, please use the “next five days” icon. The calendar toggle will not show you what is currently available.
 - c. When requesting a Phase I Workshop, you must book the Phase I dates individually. You will book the first date and then go back in and book the second date. We cannot confirm any Phase I services without having two appointment requests in the system. If you are requesting a 2-day workshop, you need to separately request both days. The second day is like a new appointment.
 - d. When completing your profile on Appointment Plus, please include ALL invoicing instructions in the special instructions box, if necessary. Invoicing instructions include supplier/ vendor registration, Certificate of Insurance needs, and any additional details you need to be included on the invoice. We do not accept invoicing requests or changes via email to keep all accounts protected so please do not request or send any invoice information via email. If your company representative for invoicing has changed, please update this information via the Appointment Plus profile.

IV. Administratively Preparing for your Service

1. Clients will need to develop their own internal registration system (i.e., Eventbrite) to manage their list of participants for the in-person Workshop. For virtual services, we manage the Zoom platform during the services and will distribute links with instructions to the client (contact person listed on Appointments Plus profile) 2

weeks prior to the service. You will need to distribute the link to your participants so they can register for the Workshop. All participants must register with our Zoom link.

2. Your Trainer team will be assigned by consideration of several factors. You will be able to connect with the Trainers the day of your service. Feel free to contact sbundy@racialequityinstitute.org if you would like specific information shared with your assigned Trainers. You can also request Trainers, but it is not a guarantee that they will be available. We will not be able to confirm your Workshop team until about 1 week prior to your service.
3. Invoices are sent after services are rendered. Should you need an invoice for multiple services at once or before the services are rendered, please contact Megan Hayes-Bell at Meganhb@racialequityinstitute.org before submitting your service request to ensure that your requests can be accommodated. DO NOT move forward with a submission request before confirming that your finance or billing requirements have been approved.
4. Invoices are ONLY sent via email to the invoice contact/s listed on the Appointments Plus profile within a week after services are completed, on which clients can submit payment directly via credit or debit card. Clients may also submit payment by mailing in a check to P.O. Box 2976 Greensboro, NC 27402.
5. If you have not received an invoice within 7 days of your service, please check your spam or junk folder for a QuickBooks invoice and/ or email Megan Hayes-Bell at Meganhb@racialequityinstitute.org.
6. **Contract and Cancellation Policy-** Once REI confirms a service, this date is reserved for you and our Trainers are assigned. Workshops canceled less than 15 days prior to the confirmed date will be charged half the cost of the workshop.
7. **This document serves as our terms and agreement.** We do not require a formal contract. A formal contract can be developed for clients upon request.
By submitting your request on Appointments Plus, you have agreed to the terms in our Hosting Guide.

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