



Contact

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Purpose

Founded in 2010, Cross Movement Social Justice Consulting is an Ann Arbor-based consulting firm specializing in customized capacity building assistance, strategic planning, governance, culturally responsive organizational development, and cross movement alliance building. With an extensive portfolio of clients, consultants have worked within a variety of sectors, including engagements with charitable organizations, philanthropic communities, social justice movements, higher education, youth, and social entrepreneurs.

CMSJC Theoretical Grounding

Several theoretical frameworks underpin CMSJC's philosophy for diversity, equity, and inclusion (DEI) engagements. Consultants incorporate multiple pedagogical approaches and theories, including participatory facilitation methods for adult learning, intergroup dialogue, intercultural communication, educating for social justice, social identity formation, critical race, feminist, anti-racism, and queer theories as well as practices that reflect a nuanced understanding of implicit bias, racial healing, and trauma-informed approaches. With each new engagement, consultants draw from these models to design a holistic methodology that is customized to meet clients' goals.

Consultants affiliated with CMSJC recognize **equity** as a structural and systemic concept that also manifests at the individual and organizational levels. Equity work entails understanding and addressing the root causes of disparities and barriers to access that currently exist within our society's institutions and systems. Evidence of these disparities and barriers are demonstrated in myriad ways and result from intersecting forms of oppression affecting individuals across race, ethnicity, gender identity, sexual orientation, disability, immigration status, income level, religion, and other dimensions of **diversity**. Achieving equity is an aspiration to demonstrate the presence of justice and fairness within practices, procedures, processes, policies, and laws, affording all people access to opportunities and resources to reach their full potential. Applying this equity lens in the deconstruction and transformation of organizations and current systems is one step toward building a more just and equitable society that promotes the values of **inclusion** and **belonging**.

Description of Possible Activities

Cross Movement Social Justice Consulting would be honored to support the advancement of a prospective client's goals related to diversity, equity, inclusion, social justice, and anti-racism, via any of the following possible activities:

1. Staff DEI Virtual Retreat

- a. **Purpose:** To intentionally create space for staff to focus on themes related to DEI through a mixture of training and strategic facilitation to identify and assess action-related goals and practices as well as process real team experiences of this moment of uprisings within the context of a pandemic.
- b. **Activities:** CMSJC would offer a customized session design and facilitation over several sessions to explore results of the climate survey, process actionable steps for committing to racial justice through an organization's work, and/or examine the organization's strengths and priority areas for improvement related to DEI moving forward.
- c. **Deliverables:** Preparatory phone calls/meetings to finalize retreat agenda, review of existing organizational data and information and one hour debrief with leadership to review findings.

2. Year-long Engagement

- a. **Purpose:** To intentionally integrate themes of DEI into the daily operations, engaging in a longer-term contract would assist the organization in embedding DEI into organizational systems, policies, practices, and strategy.
- b. **Activities:** CMSJC would offer a customized engagement for the client, depending on the organizational goals. Typically, activities would include a mixture of internal assessment, facilitated strategy sessions, training, and ongoing coaching and technical assistance.
- c. **Deliverables:** Planning phone calls/meetings, review of existing organizational data, internal assessment on climate and/or DEI practices, focus groups of external stakeholders, trainings, DEI action planning, coaching with individuals, and at least one monthly meeting with DEI committee and/or staff liaison(s).

Example Activities for a Year-Long Engagement:

A. Comprehensive Organizational Diversity and Inclusion Audit

- a. **Purpose:** As a starting point for advancing goals related to diversity and inclusion, it is helpful to have a baseline assessment of the organization's current status as it relates to

implementing best practices for DEI. This baseline helps clients track progress toward advancing strategic indicators of success for DEI goals. A final report illuminates the client's strengths and opportunities for growth.

- b. **Activities:** CMSJC would offer a customized audit that would inform its work related to DEI moving forward. To create the customized audit to inform the client's work related to DEI, a consultant with Cross Movement Social Justice Consulting (CMSJC) prepares a report and presentation on the findings, using any combination of the following data collection methods:
 - i. **Global Diversity and Inclusion Benchmarks (GDIB) Survey** - The GDIB is a free instrument made available by the Centre for Global Inclusion. This version of the GDIB is the tenth edition, developed by a panel of 95 experts in the field, including many who worked on the earlier editions. The DEI Committee members would be invited to respond to the GDIB via a customized SurveyMonkey link;
 - ii. **Staff Climate Survey** - The consultant administers a customized and anonymous online climate survey to all staff, via a customized SurveyMonkey link;
 - iii. **DEI Best Practices Checklist** - The consultant assists a client representative with completion of the best practices checklist;
 - iv. **Quantitative & Qualitative review of company materials & staff demographic trends** - The client provides the consultant with internal materials related to DEI to review and identify strengths and opportunities for growth. Materials could include current strategic plan, employee handbook/manual, policies and procedures, communications, and staff demographic data on hiring and retention;
 - v. **Focus Groups with internal and external stakeholders** – Two consultants co-facilitate focus groups emphasizing specific populations to bring additional clarity and context to the organizational audit and climate survey results. Themes from the focus groups could inform any action planning process and/or customization of training components for future DEI professional development; and
 - vi. **Individual Interviews** - The consultant conducts thirty-minute phone interviews with key individuals to gain insight into the organization's strengths and opportunities for growth. Themes from the interviews could inform any action planning process and/or customization of future training.

The consultant facilitates a discussion about the findings report with leadership and staff. Cross Movement Social Justice Consulting has conducted multiple DEI audits for a variety of clients to support their work in moving the needle related to DEI indicators. The

investment in a DEI Audit varies depending on the customization and particular combination of the components the client selects.

- c. **Deliverables:** Preparatory phone calls/meetings to finalize DEI audit methodology and instruments; completion of report highlighting findings and recommendations; and presentation of report and findings to leadership team.

B. DEI Action Plan Development and Technical Assistance to Support Achieving Goals

- a. **Purpose:** Cross Movement Social Justice Consulting would facilitate a process to develop a three-year DEI action plan. Technical assistance and support are included in this project cost, along with the development of an annual work plan. The final action year action plan will include specific goals, activities, outcomes, timelines and champions for any of the following organizational areas:
 - Strategy, vision, and mission;
 - Recruitment, selection, retention, promotion, and development of staff;
 - Legal compliance;
 - Human resources management;
 - Crisis management;
 - Programming and services;
 - Financial management;
 - Marketing, communications, and customer service;
 - Community engagement;
 - Evaluation and continuous improvement; and/or
 - Organizational development & culture
- b. **Deliverables:** Three-year action plan and year one work plan. The consultant would provide coaching as needed during the process.

C. Cultivating Catalytic Culture Shifts Training Series

- a. **Purpose:** This series is ideal for any group committed to continuous learning and growth that promotes individual and organizational transformation related to DEI. Each workshop progressively builds on the previous workshop, starting at the internal level of awareness and change, moving up through the institutional, systems and cultural levels. A common element across all workshops is the creation of space to practice cultural humility, intentional and ongoing reflection, and co-learning concerning issues related to DEI. Each workshop includes participatory facilitation techniques and methods to offer interactive and engaging activities that address multiple learning styles and approaches. The consultant calibrates every workshop to the participants' unique and dynamic energy and composition, for a tailored experience every time.
- b. **Activities:** Ms. Linares would offer this series for all staff virtually, or potentially in person if sheltering in place guidelines change. The titles for the five sessions are: 1) Exploring Our



Own Intersecting Identities; 2) Understanding Unconscious Bias and Changing Our Behavior; 3) Effectively Thwarting Microaggressions while Affirming Our Experiences; 4) Acquiring Tools for Fostering an Inclusive Culture; and 5) Taking Action: Adopting an Intersectional Social Equity Lens in Our Work. For session descriptions, please refer to page ten.

- c. **Deliverables:** Five to ten sessions, three hours each; up to two sessions per month

D. Culturally Responsive and Trauma-Informed Executive Coaching and Technical Assistance

- a. **Purpose:** Organizational leaders may benefit from regular communication and supportive coaching on issues related to DEI themes in their day-to-day activities. In this capacity, the consultants serve as a sounding board to discuss clients' insights and challenges in their roles leading this work. This service provides clients with on-call access to the consultant on a flexible basis to address high-level change management concerns as well as urgent issues as they arise.
- b. **Activities:** The consultant would provide coaching, guidance, and support to leaders within the organization on an as needed basis. The consultant may serve as a sounding board to provide recommendations regarding any nuanced situations that surface. This may also include technical assistance for implementing at DEI Action Plan.
- c. **Deliverables:** The consultant would provide coaching and technical assistance, as needed via phone call or Zoom. For optimum results, it is recommended to establish a regular schedule.

Terms of the Engagement

- **Logistics:** Client will carry out logistical coordination, such as meeting facilities, creating Zoom links and registration, presentation technology support, and refreshments (if necessary).
- **Pricing:** The total price would depend on the components included in the final agreement.
- **Travel:** CMSJC absorbs the cost of travel within Washtenaw County, and the client will pay for travel time and mileage outside of Washtenaw County at the federal reimbursement rate
- **Invoices:** CMSJ Consulting submits monthly invoices. Payment will be due upon receipt.

Sample CMSCJ Project & Client List

Battle Creek Community Foundation (2017-2020): The Battle Creek Community Foundation contracted with Cross Movement Social Justice Consulting on two strategic initiatives. The first initiative was a long-term diversity, equity, and inclusion (DEI) engagement. In the fall of 2018 Rosemary conducted a comprehensive DEI Audit and completed CMSJC's proprietary five-part training series for all 42 Foundation employees. Following the training series, Rosemary convened a DEI committee to develop a three year strategic action plan with a accompanying work plan. The second initiative is co-leading the Battle Creek Coalition for Truth, Racial Healing and Transformation (TRHT), a national and community-based process to address the historic and contemporary effects of racism, and plan for and bring about transformational and sustainable change. The Battle Creek Coalition for TRHT's aim is to serve as a catalyst for a racial equity movement in Battle Creek that transforms the way residents live, work and interact as a community.

University of Michigan Institute for Social Research (ISR) (2018-2019): The University of Michigan (UM) boldly engaged in a five-year (2016-2021) campus-wide Strategic Plan for DEI. In the summer of 2018, the leads for DEI at the UM Institute for Social Research, contracted with Rosemary Linares and Leena Mangrulkar to elicit feedback from staff regarding the Institute's progress on its DEI action plan. The goals of this engagement were to listen to staff reactions to the climate survey results and general climate conditions at ISR and reflect back the consultants' understanding and recommendations for how ISR could move toward solutions. The consultants designed and facilitated a process for multiple points of staff member engagement and feedback, culminating in a final report sharing the findings and recommendations from the process. Of the high-impact recommendations listed in the report, one was to hire a position to coordinate all DEI efforts, and in December 2019 leadership at ISR hired a Director for DEI.

George Washington University, Trachtenberg School of Public Policy (2017 & 2019): The Trachtenberg School for Public Policy and Public Administration at George Washington University engaged Cross Movement Social Justice Consulting to facilitate a seminar for three hours in August 2017 and 2019 during the new student orientation. Rosemary delivered the keynote, blending personal testimony with theory and research to explain the nature and impact of implicit bias. Rosemary sub-contracted five facilitators of different racial and ethnic backgrounds who facilitated small group discussions with 120 students. Using the data gathered during the seminar, the consultants collaboratively completed a final report including suggestions for the school to advance its internal DEI practices.