

**CITY OF MONROE
SPECIAL MEETING
OPEN CONVERSATION ON RACISM COMMITTEE**

October 20, 2020 - 1:00 P. M.

AGENDA

www.monroenc.org

This Meeting will be conducted virtually in accordance with the Monroe City Council's Rules of Procedure for Electronic Meetings.

1. Call to Order
2. Review of Received Request for Proposal
3. Decision on Request for Proposal
4. Adjournment

RECEIVED

THE INSIGHT CONSULTANTS, INC.



710 WEST TRADE STREET #709
CHARLOTTE, NC 28202
704-650-3330

theinsightconsultants.com

OCT - 8 2020

CITY OF MONROE
HUMAN RESOURCES

10/05/20

To: Ms. Debra Chestnut Reed
Human Resource Director
City of Monroe
300 W. Crowell Street
Monroe, North Carolina 28112

RE: OPEN CONVERSATION ON RACISM COMMITTEE'S REQUEST FOR FACILITATOR

1) INDIVIDUAL FACILITATOR:

Dr. James R. Samuel
710 West Trade Street, Unit #709
Charlotte, NC 28202
704-650-3330

2) FACILITATOR'S EDUCATION, BACKGROUND & EXPERIENCE:

James R. Samuel is the Co-Founder and President of The Insight Consultants, Inc. (formerly Interscope Consulting, Inc.) located in Charlotte, NC, USA. He has worked as a diversity, equity & inclusion (DEI) consultant, strategic thought leader, and group facilitator with large assemblages and small groups in different professions, fields and industries. He is also highly regarded as a presenter, keynote speaker and author. He has received national recognition for his leadership in the areas of Diversity, Equity, and Inclusion, Organizational Change, Effective Communication, Leadership Development and Racial Reconciliation.

He received a bachelor's degree from Livingstone College in Salisbury, NC; a master's degree from Duke University in Durham, NC; and a doctorate from Drew University in Madison, NJ. James has served as consultant, Administrative Dean, Academic Vice President, Professor and Guest Lecturer at colleges, universities and organizations throughout the United States, Europe, Africa and The Caribbean.

He has served on numerous civic and community organizations to include the Diversity Council of the Carolinas, NC Department of Human Resources Committee, Charlotte-Mecklenburg Civil Service Board (Chairman) and Charlotte Community Relations Council.

3) METHOD(S) OF FACILITATION:

There are several methods by which the "Open Conversations on Racism" can be conducted. The following gives an overview of several possible facilitation methods which may prove helpful; however after more discussion of the Committee's vision, mission, goals, and objectives other methodologies

may also be considered. However, based on the RFP content, vis-à-vis the sensitive subject matter, participants should be given guidelines governing: group autonomy (sovereignty) group anatomy (structure) group animus (spirit). Facilitator will use some or all of the following facilitation methods:

ACTION-ORIENTED FACILITATION is a process that produces actionable results and provides opportunities for learning by working on real problems in an open group setting where participants are led to share their ideas on how to create solutions to shared problems through a method known as “*learning by doing*”. Success is based on the belief that learning and closing the gap between specific groups of stakeholders is best achieved by providing a safe environment wherein selected participants feel free to share in open, honest, and respectful discussion around matters of mutually meaningful concern. An action oriented discussion is guided by posing skillful questions in a facilitator led format.

CONSENSUS-ORIENTED FACILITATION is a more tedious method of achieving support by way of approval as opposed to agreement. The practice of using consensus to transition from discord to accord is most valuable when participants become stuck on strongly opposing opinions. The goal is to bring them to the point of agreeing to disagree without becoming disagreeable. Consensus gaining is strategically important because it does not require full agreement or the absence of opposition. Rather, consensus gaining is achieved by acknowledging any and all objections, and then proceeding with the proposition that offers the lowest level of resistance, and the suggestion that receives the highest degree of acceptance. Consensus is more easily attained when those who disagree are assured their voice has been heard and their opinion is respected. Gaining consensus may sound something like this: “*While I do not agree with the decision, for the good of the process, I will support it*”.

SOLUTION-ORIENTED FACILITATION is a specific method of achieving solutions to a prescribed goal by keeping participants focused on the group’s commonly desired outcome. Solution facilitation is ideal in large group settings wherein open conversation is the norm. The facilitator manages the session and keeps the participants focused on their commitment to seek solutions to a specific problem. The solution-oriented facilitator prevents the group from becoming “stuck” on discussing the problem, and/or getting side-tracked into focusing too much on symptoms of the problem rather than focusing mainly on finding solutions. This facilitation technique is most valuable when discussing problems which are rooted in the past that have gone unaddressed. Solution-oriented facilitation encourages those who are “stuck” in the rut of past circumstances to become free to consider the present, and focus on the promise of a better future more so than being fixated on the pains of their past experiences.

1. Session Format

- a. Method for developing agenda—in consultation with the Committee
- b. Role of Committee—oversee, manage, and monitor sessions
- c. Role of Facilitator—support Committee as needed, lead sessions, record/report results
- d. Participant engagement methods (*see answer provided above in #3*)
- e. Availability—Facilitator is available for all of the proposed dates:

—Session #1—Monday, December 7, 2020 (available)
Tuesday, December 8, 2020 (available)
Thursday, December 10, 2020 (available)

—Session #2—Monday, January 11, 2021 (available)
Tuesday, January 12, 2021 (available)
Thursday, January 14, 2021 (available)



2. Product Facilitator will provide for each meeting and at the conclusion of the engagement. Facilitator will provide the following support services to the Committee:
- a. Preparation: assist the Committee in planning, designing, and coordinating the event
 - b. Presentation: establish and explain the purpose, process, and procedure for the event
 - c. Participation: promote the importance of equal impartiality toward all participants
 - d. Prioritization: report results and prioritize action-oriented outcomes
 - i. Facilitator acknowledges, accepts, and respects the autonomy of the client to model, manage and monitor all functions rendered by the facilitator in fulfillment of the contracted services provided by the consultant.
 - ii. Facilitator agrees to exhibit regard and respect for the culture, comments, and concerns of all participants without personal preference or bias.
 - iii. Facilitator affirms the use of methods, processes, and techniques in a manner that protects value, and preserves the dignity of all participants, regardless of their viewpoints or opinions.
 - iv. Facilitator accepts the responsibility to maintain information in a confidential, responsible and professional manner.

3. Identify how success will be measured or attained from the sessions.

There are a number of ways to measure success in an open-conversation format:

- a. Pose this question to begin the session *"What would success look like to you?"*
- b. Have participants define the purpose, goals and desired outcomes to begin the sessions.
- c. Conduct a pre-session/post-session survey in order to gain insight from participant's perspective as to the success of the sessions.
- d. Create a short-form satisfaction survey which contains several outcome related questions to which the answers are rated on a numerical scale such as follows:
1.Strongly Disagree, 2.Disagree, 3.Unsure, 4.Agree, 5.Strongly Agree.
- e. Ask participants to respond to open ended questions such as:
"What was the most important thing you learned or experienced in these sessions?"
"Do you think these sessions were a success or failure? Please explain why?"

4) NARRATIVE OF FACILITATOR'S QUALIFICATIONS::

Facilitator's training, area of specialization:

Throughout his career James has worked with national and international leaders of such Fortune 500 companies as Prysmian (Italy), Delhaize Group (Holland) Wachovia/Wells Fargo (California), AON (NY), Williams Companies, Inc. (Tulsa, OK), Duke Endowment (NC), The St. Paul Insurance Companies (St. Paul-Minneapolis MN), Greenville Hospital System (SC), Palmetto Health Trust System (SC), Duke Energy (NC), Food Lion (NC), HUD: The US Department of Human and Urban Development (DC) and others, where he helped executives and employees to effectively develop programs and workplace initiatives related to achieving their organizational goals and objectives.

At Prysmian James and Senior Consultant Jan Barton provided consultation during and following a major acquisition (Draka Cable) wherein they worked closely with an international group of Prysmian executives to develop and conduct several years of programs and international training for global and national Prysmian executives throughout the US and Canada in the areas of Organizational Change, Intercultural Leadership Skills and Effective Communication. They



presented training sessions at all Prysmian locations throughout the US and Canada. They have worked closely with Prysmian executives currently serving in global locations to include Italy, Germany, Sweden and North America.

James has been cited in The New York Times, Washington Post, Los Angeles Times, San Francisco Chronicle, Charlotte Observer, the Raleigh News and Observer, Washington Minorities in Business Insiders, National Public Radio "Marketplace" and the United States Department of Justice "Weed and Seed" publication for his organizational development programs and innovative leadership. Livingstone College awarded him an honorary doctorate in recognition of his academic, civic and professional achievements.

His book, *The Roots of Racism* (Vantage Press, NY), favored with a book review and endorsements from The Charlotte Observer and The New York Time. His publication on race and reconciliation has attracted international distribution as a valuable resource in the study of race relations.

1. Facilitator training, area of specialization:
 - a. Educational training (*see answer provided above in #2*)
 - b. Professional experience (*see answer provided above in #4*)
 - c. Specialization—
 - i. Racial reconciliation
 - ii. Developing intercultural skills
 - iii. Managing diversity, equity & inclusion
 - iv. Executive leadership training and organizational development strategies
2. Facilitator's direct experience in this topic or similar topic
 - a. In 2004 he was invited by the US House of Representatives to participate in a Congressional Hearing on racial diversity in the United States workforce.
 - b. Facilitator led Union County Appeal for Unity & Justice via Zoom, August 25, 2020
3. Previous engagements with municipal, county, state or federal government:
 - a. City of Durham, NC: consulted with Housing Authority and low income residents.
 - b. City of Lynchburg VA: consulted with mayor and officials on managing diversity.
 - c. City of New Orleans/St. Helena: conducted diversity training for education officials.
 - d. City of Charlotte, NC: consulted on public housing to homeownership transition.
 - e. HUD Regional Conference keynote speaker (Daytona Beach, FL and Asheville, NC).
 - f. US House of Representatives: participated in Congressional Hearing on race & workforce diversity in the United States.
4. Facilitator is experienced in using Zoom virtual meeting format and presentation platform.

5) PROPOSED RATE SCHEDULE:

- a. Facilitation Daily Rate: \$2,000 (max 8 hours)
- b. Facilitation ½ Day Rate: \$1,200 (max 4 hours)
- c. Non-Facilitation Hourly Rate: \$300 (per hour)
 - i. Facilitation sessions lasting up to 4 hours are charged ½ day rate.
 - ii. Facilitation sessions lasting more than 4 hours are charged daily rate.



- iii. Non-Facilitation consulting services are based on the hourly rate provided.
- iv. Travel is submitted for reimbursement at cost, based on current state rate.

6) PREVIOUS DISQUALIFICATIONS OR TERMINATIONS:

- None. We have been in business since 1995 and have never had a disqualification or termination.
- 1. Our success over 25 years has been based on our client's satisfaction and referrals.
 - 2. Our clients are among our most valuable assets and we view their success and satisfaction to be essential to our own.

7) LIST OF LAST FIVE CLIENTS:

- 1. Stanford University Medical Network—developed diversity initiative, provided CEO support & Executive leadership training (Brian Teusink, CEO 803-461-8366).
- 2. AON—provided team work and staff development (Kevin Bryant, EVP 846-241-1514).
- 3. Prysmian—provided ex-pat support; developed program to provide intercultural skills for international executives; taught cultural conflict resolution, and effective communication skills (Peter Durante, VP HR 803-951-1024).
- 4. FoodLion/Delhaize Group—designed and developed executive leadership skills in a diverse environment initiative; provided diversity training (Eric Watson, VP/DO 704-305-4669).
- 5. City of Durham & Charlotte NC (Harrison Shannon CEO Housing Authority 704-618-4970).

8) CONFLICTS / POTENTIAL CONFLICTS OF INTEREST:

No Conflicts of interest exist.

9) OTHER USEFUL INFORMATION TO BE CONSIDERED:

*Not just any talk is conversation. Not any talk raises consciousness.
 Good conversation has an edge. It opens your eyes to something.
 It quickens your ears and good conversation reverberates.
 It keeps on talking in your mind later in the day.
 The next day, you find yourself still conversing with what was said.
 The reverberation afterward is the very raising of consciousness.
 Your mind and heart have been moved.
 You are at another level within your own reflections. - James Hillman*



Our Logo Is Our Motto:

Diversity, Equity, and Inclusion is like a stained glass window. There is a common bond, the lead, that holds it all together; yet it is the varied colors, sizes, shapes, textures, and the position of each piece—as well as the perspective in which it is viewed—that produces the masterpiece. Each piece stands on its own, yet is dependent on the other pieces to create the whole image. They all must work together to achieve the common objective. — The Insight Consultants



WPR Consulting, LLC

- Diversity & Inclusion Training
- Mediation Training
- Sexual Harassment Training
- Communications & Team Building Training
- Group & Retreat Facilitation
- Conciliation and Mediation
- Strategic Operations Planning



Willie Ratchford, President

Ms. Debra Chestnut Reed
Human Resource Director
City of Monroe
Post Office Box 69
Monroe, North Carolina 28111

Ms. Reed,

I am pleased to present the enclosed proposal to work with the City of Monroe, North Carolina and the Open Conversation on Racism Committee by planning, developing, implementing and facilitating a process to engage the community, through open conversation, on the topic of racism; and develop expectations for local institutions, in Monroe, to address racism and establish a pathway and strategy to achieve those expectations.

After your review, if you have any questions you may call me at 704.606.7446.

Thank you for this opportunity to share my thoughts and potential partnership with this work.

Sincerely,

Willie Ratchford, President
WPR Consulting, LLC

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OCT - 1 2020

CITY OF MONROE
HUMAN RESOURCES

~WPR Consulting, LLC, 12611 Cedar Post Lane, Charlotte, NC 28215, (704)606-7446~

Open Conversation on Racism: City of Monroe, North Carolina

Proposal to address the human relations needs of the City of Monroe by planning, developing, implementing and facilitating a process to engage the community on the topic of racism; and develop expectations for local institutions to address racism and establish a pathway and strategy to achieve those expectations.



Willie Ratchford

Conversation on Racism: City of Monroe, North Carolina

Introduction

Willie Ratchford, President of WPR Consulting, LLC, is pleased to present this proposal to work with the City of Monroe, North Carolina by planning, developing, implementing and facilitating a process to engage the community on the topic of racism; and develop expectations for local institutions to address racism and establish a pathway and strategy to achieve those expectations.

The City of Monroe is a community and an organization of residents and employees of different races, colors, faiths, ethnicities, nationalities and sexual orientations. The city holds the same diverse representation of life as does the world. Monroe's community leaders and city staff understand that there is more that unites their city than divides it; and that as a city and an organization that values diversity, equity and inclusion they must remain mindful of the commonalities that comprise the very fabric and makeup of the city and its constituents.

It is right that as a diverse city, Monroe strives for a community and an environment of fairness, equity, inclusion and respect. Monroe's path towards equity and inclusion is beneath the feet of its residents and employees as it ventures to communicate about the difficult issue of race and racism, and reflect and receive knowledge, foster mutual understanding, and model mutual tolerance for all who choose to live in or work for the city.

The community of Monroe includes and employs people of diverse backgrounds, including race, sex, religion, national origin, color, age, disability, familial status, and sexual orientation. The customer base that Monroe serves also represents the various community factions as outlined above. In order to provide opportunities and services that are culturally competent and appropriate, the community and all city staff must educate themselves about the racial, ethnic, cultural, economic, social, and sexual dynamics of the community. City residents and employees

must increase their understanding of their human relations; and the need to address race and racism head on. This starts with conversation.

To address Monroe's desire for assistance to its "Open Conversation on Racism Committee" with two sessions to help engage the community on the topic of racism, identify and/or develop expectations for local institutions to address racism, and establish a pathway and strategy to achieve those expectations, Willie Ratchford will develop and implement a comprehensive facilitation plan and response to the request for proposal as follows:

Individual Facilitator:

Willie Ratchford, President, WPR Consulting, LLC
12611 Cedar Post Lane
Charlotte, North Carolina, 28215
704.606.7446
wprconsult@bellsouth.net

Education and Professional Background as a Facilitator:

In addition to his role as President of WPR Consulting, LLC, Mr. Ratchford has worked for over 40 years with the City of Charlotte's Community Relations Department, including 26 years as the organization's Executive Director. He is responsible for facilitating, developing, directing, and implementing programs and activities to maintain and improve community/race relations, directing and reviewing equal opportunity investigations and discrimination complaints, and recommending solutions for community problems, providing training in anti-discrimination laws, ordinances and regulations, and facilitating community conversations/dialogues on difficult community issues, including race and racism. He oversees strategic operations planning, business planning, and the development of goals and objectives for WPR Consulting, LLC and the Community Relations Department.

He received his bachelor's degree in Sociology from Tufts University in Medford, Massachusetts and completed one year of study towards a master's in social work at UNC Chapel Hill. He is a graduate of the John F. Kennedy Leadership School at Harvard University (Leadership Certification), the Institute of Government at the University of North Carolina at Chapel Hill (Certificate of Municipal Administration), the Charlotte Chamber Leadership School and Focus on Leadership. He is also a certified trainer in mediation, diversity, fair housing and sexual

harassment; and he has over 40 years of experience facilitating community dialogues and conversations on race, racism, diversity, equity and inclusion.

Ratchford has been active in civil rights for over 40 years and in 1998 he received the Charlotte Area Peace Corps Association's first "Peace Prize" for his work to reduce racial tensions and foster a spirit of harmony in the community. In 2005 he received the Individual Human Rights Award from the National Association of Human Rights Workers and the Nancy Susan Reynolds Award for Race Relations in 2006, presented by the Z. Smith Reynolds Foundation to recognize persons who have encouraged and motivated improved relationships among people of different racial and ethnic backgrounds. In 2008 he received the Spirit of Detroit Award in recognition of exceptional achievement, outstanding leadership, and dedication to improving the quality of life for everyone. In 2011 he received Mecklenburg Ministries' Annual Community Leader Award. In 2015 Charlotte Mayor Dan Clodfelter presented to Ratchford the Mayor Richard Vinroot Award for outstanding community service for his work to help calm community tensions in the wake of the trial of a police officer accused of killing a citizen. He is a Past President of the National Association of Human Rights Workers. He currently serves as the Vice-Chair for the USCCR North Carolina State Advisory Committee and is a board member of the Community Building Initiative, the Jamie Kimble Foundation for Courage, and the National Community Advisory Forum for Fifth Third Bank.

Methods and Approach:

Community conversations on race and racism is not easy when Black and White people, and other Ethnic groups in the community, make a conscious choice to have "the talk" about race and racism. Very often, participants in the dialogue will adhere to politically correct and polite language out of fear of being perceived as racist if they say the wrong thing or simply make a mistake in their choice of words. This is natural, normal and understandable. The talk about race/racism can be easy if the dialogue participants have relationships where they like one another and converse on other topics without getting defensive. They leave the conversation with the relationship intact, even if there is disagreement. The relationship helps in creating a safe space where it is okay to have difficult conversation, even about race/racism.

In addition to proposing that residents of Monroe and the members of the Open Conversation on Racism Committee be intentional about building relationships across racial and ethnic lines in order to have the “the talk,” the Consultant also proposes the following:

Talking about race and racism is at the heart of the work of the Open Conversation on Racism Committee (OCOR). The committee strives to build itself as an organization free of the fear to address race/racism head on. For this to happen, OCOR members should feel comfortable asking constructive questions of one another in their various settings, including with the community. If a question is asked or a statement made and a committee or community member feels that it has racial implications, or that racial accusations are being made, committee and community members need to feel they can talk about it and hold one another accountable. They should also understand that this means that they agree to be held accountable themselves as well.

When engaging in community conversations on race and racism, OCOR members and the community need to be sure that attacking, shaming or blaming has no place in their work or dealings with each other. If an OCOR member feels that a question or statement is racially insensitive or racially offensive, then they should be able to address that in a straightforward way. Committee and community members should work to gain tools that will help them in their work internally and externally.

Addressing Conflict Caused by Conversation on Race/Racism

According to Merriam-Webster, Inc, conflict is “a mental struggle resulting from incompatible or opposing needs, drives, wishes or external or internal demands.” Conflict is around us all the time. A good example would be every time we turn on the evening news, we are faced with conflict somewhere in our world. These incidents have some type of effect on our lives. Personally, we may face conflict in our relationships, on the job, at school, at church, in our neighborhood, at the movies, the mall, or even at a committee or community meeting.

Conflict is a natural part of human behavior. It is as much a part of our lives as waking up, eating, sleeping, relating with others, learning, teaching, traveling etc. Think back to the last book you read, or the last movie you saw. Remember the last sermon you heard or the last ballgame you went to see (of course before COVID-19). Without knowing what that something was, we can be 100% sure that it involved some type

of conflict. Whether it is the triumph of the good guy versus the bad guy in an epic saga, or the competition with both teams striving to win, conflict is present, and it is a normal part of our daily lives.

Conflict can be physical and external or emotional and internal. How we choose to deal with conflict often reflects our life experiences or the experiences of our loved ones, or the way we were taught at an early age by our parents and teachers. We can choose to manage conflict, or we can let conflict manage us. The choice is ours.

As indicated earlier, there are many causes of conflict to include different points of view, having multiple or conflicting priorities, personalities, culture, lack of understanding, adapting to change and not properly knowing how to communicate frustration. Conflict may also be caused by questions at a committee or community meeting that may be perceived to have racial overtones or implications, or where one member might make racial accusations against one or more of the members present based on a perception of racism.

Intent vs. Impact

Conflict may also be caused by one person's intent and the impact it has on another person. This is especially important when dealing with the issue of race or with "ism.". For instance, in a committee or community meeting, a White member or conversation participant might make a statement or ask a question about the reality of "Black on Black crime" to get a point across; however, the impact of the statement/question on a Black committee or community member hearing it may be just the opposite of what the speaker intended.

It is also possible that the impact of a member's statement may be due to that member's implicit (unconscious) bias and they may not understand why or know what they have just said is taken as racist, or sexist or homophobic by other board members. Either way, this could be the beginning of a conflict and if left unchecked will cause much harm to the committee or community over time. If this happens, members have an opportunity to manage the conflict, or end up allowing the conflict to manage and subsequently damage the committee and its work or the community.

What to Do

Sometimes, all you need to address questions or statements that may be perceived to have racial implications, or to address racial accusations, is an opportunity to share your feelings, acknowledge mistakes and find solutions. If you find yourself in conflict about race with someone on the committee or the community, the following steps might prove to be helpful:

Relax and Breathe – Take a moment to step away and breathe slowly and deeply for a few minutes- check your emotions.

Have the Conversation – Be courageous enough to have the tough conversation about race/racism with the person whose statements or questions caused you concern – very often we will talk to everyone in our circle about an issue we have with a fellow community member, but not the person we have the problem with. Hold one another accountable.

Check In – Check in with the person you need to have the conversation with to make sure they are ready to receive your concerns – try an “I” statement: *“I feel upset or concerned about what you just said or asked and would like to talk with you about it. Can we talk?”*

Think – Think about what you hope to achieve by stating your interests, needs and wants - be intentional about being constructive and avoid negative feedback/behavior.

Listen and Share – State how you feel by making “I” statements and ask the other person to share their feelings. Listen to what they say before responding. Ask about their intent and share the impact on you.

Don’t Pass Blame – Acknowledge and apologize when necessary. Passing blame and making accusations will only further the conflict.

Talk and Prevent – Focus on a solution and/or agreement. Talk with the other person about what can be done in the future to prevent the conflict from reoccurring – don’t be afraid to hold one another accountable.

Consultant's Proposed Conversation Guidelines for OCOR's Community Conversations

In order to create a safe space to have inter-racial conversation about race/racism, it is usually helpful to establish conversation guidelines in advance of the conversation. These should be shared with the group ahead of the dialogue and participants should agree to abide by them. The OCOR can create its own guidelines or they may consider the ones below as offered by the Consultant.

- Agree to address race/racism and the conflicts it causes head on
- Be respectful and honest with one another
- Agree to hold one another accountable
- Agree to be held accountable
- Speak your feelings and thoughts by making "I" statements
- Use "both/and" thinking, "rather than either/or"
- Listen for understanding rather than judgment
- Be open to thoughts and feelings different from your own
- Build on what each other has said in the conversation
- Remember that it's OK to disagree but NOT to attack, shame or blame
- Finish with mutually agreeable resolutions

Session Format:

In order to engage and have meaningful conversation with the members of OCOR and members of the Monroe community on race/racism, the Consultant has developed and proposes use of the two conversation modules on the following pages. The modules essentially develop the conversation session agenda, the role of the OCOR members as well as

the facilitator (Consultant), and they outline participant engagement methods.

The first module will be used to capture participants' thoughts about race and racism in Monroe. It will also allow some understanding of how race and racism are perceived differently depending upon one's racial identity, keeping in mind that the conversation is not a debate or a problem-solving discussion. Participants will not be asked to come to a singular conclusion, but rather to express and better understand the multiple realities that may be in the room.

The second module will be used to identify and develop expectations for individuals and local institutions to address racism and establish pathways and strategies to achieve those expectations.



City of Monroe

Community Open Conversation Module #1

Talking About Race/Racism – **Perceptions & Thoughts**

PURPOSE: To provide a safe space for open community conversation and the sharing of feelings, stories and people on the topic of race/racism.

TIME: 90 – 120 minutes (TBD)

PROCESS: Facilitated by the Consultant

Identify an OCOR member to assist in facilitating/guiding small group conversations of 6-8 people. The role can be as simple as starting and ending the conversation, ensuring that everyone is encouraged to speak and that everyone is listening to others.

1. Key Guidelines for OCOR Table Moderators:

Authentic personal sharing; listening and giving space to others.

This is not a “debate” or a problem-solving discussion. They are not trying to come to a singular conclusion but rather to express and better understand the multiple realities that may be in the room.

LISTENING to others and accepting views and experiences that may be different from one’s own is very important. The hope is that there is a new shared understanding in listening to each other.

2. Share the purpose and ask participants to reflect on the questions in silence for a few minutes (2 - 5'). They may write some responses, but that is not essential. A few moments of silent reflection are crucial, however.
3. Take the questions one at a time and let each person respond before you move to the next question. These questions are offered to promote open and honest dialogue on a very difficult issue in the WSFD, race.
4. Ask follow-up questions as appropriate.

5. In closing, ask how understanding has increased through listening to others' responses to the questions.

QUESTIONS for REFLECTION

FEELINGS

What are your thoughts and feelings about perceptions of race/racism in the city of Monroe?

Have these feelings shifted or become more complex over time? If so, how?

STORIES

What is the dominant story you are telling yourself and others about race/racism in the city of Monroe?

What other stories are you hearing? Who is telling these stories?

Whose story don't you know or understand?

How does your personal story intersect with the other stories you are hearing?

PEOPLE

How can you – as leaders and individuals in the city of Monroe - connect and stand with those in the city who see themselves as vulnerable and marginalized in the community?

What must you confront that's "in the ground" in the city of Monroe, and in yourselves in order to interrupt the perception of racism?

What must be done to move the city of Monroe and the community forward?

MOVING FORWARD

For the city Monroe to successfully move forward, what are you personally willing to do to make that happen? What is your role?

City of Monroe

Community Open Conversation Module #2

Talking About Race/Racism – **Expectations & Strategies**

PURPOSE: To provide a safe space for conversation and community feedback to develop a vision, expectations and strategies to address race/racism in Monroe, NC.

TIME: 90 -120 minutes

PROCESS: Facilitated by the Consultant

Identify an OCOR member to assist in facilitating/guiding small group conversations of 6-8 people. The role can be as simple as starting and ending the conversation, ensuring that everyone is encouraged to speak and that everyone is listening to others.

1.Key Guidelines for OCOR Table Moderators:

Authentic personal sharing; listening and giving space to others.

This is not a “debate” or a problem-solving discussion. They are not trying to come to a singular conclusion but rather to express and better understand the multiple realities that may be in the room.

LISTENING to others and accepting views and experiences that may be different from one’s own is very important. The hope is that there is a new shared understanding in listening to each other.

2. Share the purpose and ask participants to reflect on the questions in silence for a few minutes (2 - 5'). They may write some responses, but that is not essential. A few moments of silent reflection are crucial, however.
3. Take the questions one at a time and let each person respond before you move to the next question. These questions are offered to promote open and honest dialogue on a very difficult issue in Monroe, race/racism.
4. Ask follow-up questions as appropriate.

5. In closing, ask how understanding has increased through listening to others' responses to the questions.

QUESTIONS for REFLECTION

VISION

When you wake up tomorrow morning, if racism no longer existed in Monroe, North Carolina, and race relations were ideal the city is viewed as a city without racial division or animus; and diversity, equity and inclusion is standard operating procedure, what would it look like?

What would optimal trust and transparency between all people, regardless of racial or ethnic identity, look like? What would Monroe look like?

KEEP DOING

In order to achieve the vision, you have outlined in response to the vision question above, what is the city Monroe and its residents currently doing that they need to **KEEP** doing to achieve that vision?

STOP DOING

In order to achieve the vision, you have outlined in response to the vision question above, what is the City of Monroe and its residents currently doing that they need to **STOP** doing to achieve that vision?

START DOING

In order to achieve the vision, you have outlined in response to the vision question above, what is the City of Monroe and its residents currently not doing that they need to **START** doing to achieve that vision?

ACTION

What are you personally willing to do to make the vision happen? What do you see as your role?

Session Dates and Times Availability:

Session #1

Monday, December 7, 2020 – Available *

Tuesday, December 8, 2020

Thursday, December 10, 2020

Session #2

Monday, January 11, 2020 – Available *

Tuesday, January 12, 2020

Thursday, January 14, 2020

* The Consultant's preferred availability is highlighted above; however, he can be available each of the dates listed (Session 1 and 2) if need be.

Facilitator/Consultant Product:

The product the Consultant will provide for the first meeting will be a virtual or in-person safe space for open community conversation and the sharing of feelings, stories and people on the topic of race/racism in the City of Monroe. The feedback from the meeting will be captured and typed to be provided to the members of the Open Conversation on Racism Committee. The OCOR members, in turn, can use this feedback to get a better understanding of the community's perceptions on race and racism; how it impacts people differently based on racial and ethnic identity, the stories community members are telling and hearing about race and racism, ideas on how the OCOR Committee might connect with vulnerable and marginalized communities in Monroe who are adversely impacted by racism, and community feedback on ideas and suggestions Monroe might consider in order to move forward. And just as important, the community feedback will provide a sense of what individual members of the community are personally willing to do to address racism and move the community forward.

The second meeting will provide a safe space for community conversation and feedback the OCOR and the City of Monroe will need to identify and develop expectations for local institutions and individuals to address racism and establish pathways and strategies to achieve those expectations. This feedback will also be typed up and provided to the members of the OCOR for their work.

Four immediate products are included in this proposal as follows:

- Counsel on how the OCOR and the City of Monroe might address conflict that may be caused by community conversations on race/racism (see pages 5 - 7).
- A proposed set of conversation guidelines for community dialogues on race/racism (see page 8).
- A community conversation module for creating a community vision on race/racism (see pages 10 -11)
- A community conversation module for creating community feedback on strategies the city might consider addressing race/racism moving forward (see pages 12 – 13).

Measuring Success from the Sessions:

The information and modules included in this proposal are sound and proven. The immediate indicator of success in this process will be the ability of the Consultant (Facilitator) and the members of the OCOR to get active participation from the community in the proposed sessions. The idea here is that we will need the community to be truly engaged in the conversations on race/racism during the sessions. The community must take ownership of the dialogue. If we are successful with this, everything else will fall into place.

Qualifications of the Facilitator

In addition to his role as President of WPR Consulting, LLC, Mr. Ratchford has worked for over 45 years with the City of Charlotte, including 40 years with Charlotte's Community Relations Department. He has been the organization's Executive Director for over 26 years. He is responsible for facilitating, developing, directing, and implementing programs and activities to maintain and improve community/race relations, directing and reviewing equal opportunity investigations and discrimination complaints, and recommending solutions for community problems, providing training in anti-discrimination laws, ordinances and regulations, and facilitating community conversations/dialogues on difficult community issues, including race and racism. He oversees strategic operations planning, business planning, and the development of goals and objectives for WPR Consulting, LLC and the Community Relations Department.

He received his bachelor's degree in Sociology from Tufts University in Medford, Massachusetts and completed one year of study towards a master's in social work at UNC Chapel Hill. He is a graduate of the John F. Kennedy Leadership School at Harvard University (Leadership Certification), the Institute of Government at the University of North Carolina at Chapel Hill (Certificate of Municipal Administration), the Charlotte Chamber Leadership School and Focus on Leadership. He is also a certified trainer in mediation, diversity, fair housing and sexual harassment; and he has over 40 years of experience facilitating community dialogues and conversations on race, racism, diversity, equity and inclusion.

Ratchford has been active in civil rights for over 40 years and in 1998 he received the Charlotte Area Peace Corps Association's first "Peace Prize" for his work to reduce racial tensions and foster a spirit of harmony in the community. In 2005 he received the Individual Human Rights Award from the National Association of Human Rights Workers and the Nancy Susan Reynolds Award for Race Relations in 2006, presented by the Z. Smith Reynolds Foundation to recognize persons who have encouraged and motivated improved relationships among people of different racial and ethnic backgrounds. In 2008 he received the Spirit of Detroit Award in recognition of exceptional achievement, outstanding leadership, and dedication to improving the quality of life for everyone. In 2011 he received Mecklenburg Ministries' Annual Community Leader Award. In 2015 Charlotte Mayor Dan Clodfelter presented to Ratchford the Mayor Richard Vinroot Award for outstanding community service for his work to help calm community tensions in the wake of the trial of a police officer accused of killing a citizen. He is a Past President of the National Association of Human Rights Workers. He currently serves as the Vice-Chair for the USCCR North Carolina State Advisory Committee and is a board member of the Community Building Initiative, the Jamie Kimble Foundation for Courage, and the National Community Advisory Forum for Fifth Third Bank.

Previous Engagements with Municipal Government:

City of Winston-Salem, NC: Currently working with the City of Winston Salem, North Carolina to plan, develop, implement and facilitate a comprehensive diversity, equity and inclusion project that will address allegations of systemic racism/racial issues in the City's Fire Department and to make recommendations to improve the organizational culture, processes and policies to make them more inclusive – August 2020

City of Rocky Mount, NC: Worked with the City of Rocky Mount, NC to plan, develop, implement and facilitate four communitywide conversations that provided over 200 participants with a safe and inclusive space to express their hopes, fears, and concerns regarding the existence of a prominent confederate monument in the community. Facilitated all the community conversations which were rich, engaging and energetic. Attendance was racially, ethnically, and economically diverse representing multiple geographies in Rocky Mount, including individuals from inner city and suburban neighborhoods, grassroots groups, congregations, service providing organizations, government and business – July 2018.

City of Raleigh, NC: Developed, implemented and facilitated a process to engage the residents of Raleigh, North Carolina in conversations about race and police community relations. The conversations provided participants with a safe space to engage in honest and open dialogue on race and police community relations; and other issues of importance to the City of Raleigh. The facilitated conversations addressed recent events, at the time, across the country and in Raleigh that adversely impacted race and police community relations – October 2016.

Additional engagements include development, implementation and facilitation of diversity, equity and inclusion training modules for the following cities:

- Salisbury, NC
- Goldsboro, NC
- Durham, NC
- Mooresville, NC
- Virginia Beach, VA
- Atlanta, Georgia
- Multiple private and non-profit organizations in the Charlotte area and across the state of North Carolina

Virtual Meetings and Technology Experience:

The Consultant/Facilitator has been working daily for the last six months with virtual meetings and technology – Zoom, WebEx, Go-to-Meeting, and Micro-Soft Teams.

Rate Schedule / Quote:

\$4250 / \$4500*

- Administration & Preparation
- OCOR Committee Member Consultations
- Module to Address Conflict as a Result of Community Conversation on Race/Racism
- Development of Conversation Guidelines for Community Conversations
- Vision Development Conversation Module
- Expectations & Strategies Development Conversation Module
- Facilitation of 2 Community Conversations – Virtual or In-Person
- Consultation to Develop a Community Vision, and Community Expectations and Strategies to Address Race/Racism in Monroe
- Travel and Accommodations as Needed for In-Person Facilitations*

Disqualification / Termination

In 14 years of doing this type of work in North Carolina, Virginia and Georgia, the Consultant and WPR Consulting, LLC have never been disqualified or terminated early before the completion of a contract, with or without cause.

Listed Clients / Scope of Work

Angel Wright-Lanier
Assistant City Manager
433 Hay Street
City of Fayetteville, North Carolina 28301
910-433-1994

AWright-Lanier@ci.fay.nc.us

Scope of Work: Facilitation of community-wide conversations to address the existence of a confederate monument of the City's Seal and whether it should be removed.

Rochelle Small-Toney
City Manager
331 S. Franklin Street
City of Rocky Mount, North Carolina
252-972-1325
rochelle.small-tonney@rockymountnc.gov

Scope of Work: Worked with the City of Rocky Mount, NC to plan, develop, implement and facilitate four communitywide conversations that provided over 200 participants with a safe and inclusive space to express their hopes, fears, and concerns regarding the existence of a prominent confederate monument in the community.

Damon Dequenne
Assistance City Manager
PO Box 2511
Winston-Salem, NC 27102
336.771.5109

damond@cityofws.org

Scope of Work: Currently working with the City of Winston Salem, North Carolina to plan, develop, implement and facilitate a comprehensive diversity, equity and inclusion project that will address allegations of systemic racism/racial issues in the City's Fire Department and to make recommendations to improve the organizational culture, processes and policies to make them more inclusive

Marchell Adams-David
Assistant City Manager
222 West Hargett Street
Raleigh, NC 27602
910.334.9117

Marchell.david@raleigh-nc.gov

Scope of Work: Developed, implemented and facilitated a process to engage the residents of Raleigh, North Carolina in conversations about race and police community relations. The conversations provided participants with a safe space to engage in honest and open dialogue on race and police community relations; and other issues of importance to the City of Raleigh.

Kelli Doyle, Senior Administrative Specialist
Human Resources Department
City of Salisbury
132 North Main Street
Salisbury, North Carolina 28145
704.216.8021

kdoyle@salisburync.gov

Scope of Work – Diversity, Equity and Inclusion Training for 100% of the city's employees.

Conflicts of Interest:

The Consultant has no conflicts of interest as a facilitator for the OCOR Committee. To avoid any potential conflicts, before working with another municipality in North Carolina, the Consultant always seeks advice from the City of Charlotte's City Attorney's Office before proceeding and signing a contract.

Submitted By:

Willie Ratchford, President
WPR Consulting, LLC
12611 Cedar Post Lane
Charlotte, NC 28215
704.606.7446

STAFF REPORT

TO: Open Conversation on Racism Committee

VIA: E.L. Faison, City Manager

DATE: October 20, 2020

FROM: Debra Chestnut Reed, Director of Human Resources

PREPARED BY: Debra Chestnut Reed, Director of Human Resources

SUBJECT: Open Conversation on Racism Committee

SUMMARY STATEMENT

Provide Committee with responses to Request for Proposal that were received by the deadline and to make recommendation concerning selection of facilitator.

REVIEW

Request for Proposal were sent out to five facilitators with a return deadline of October 9, 2020. Two consultants (The Insight Consultants and WPR Consulting) returned proposals for review.

The Committee will review each proposal for requested information which should include background ground information on each facilitator, sessions format, available dates, qualifications, rate quote, any disqualifications, client listing and conflicts or potential conflict.

RECOMMENDATION

Staff requests the Committee review the proposals and, if the Committee wishes, to make a selection recommendation.

CONSULTANTS THAT SUBMITTED RESPONSES

Consulting Firm or Entity	Principal Consultant	Cost Elements	Estimated Cost for Both Sessions	Pre Meeting Consulting and Fee	Provided Background Info	Session Format	Available Date	Disqualifications	Previous Engagements	Recent Clients
The Insight Consultants , Inc.	James R. Samuel	Daily Rate: \$2,000 (For sessions lasting 4-8 hours) Half Day Rate: \$1,200 (For sessions lasting 0-4 hours) Non Facilitation Rate: \$300 per hour Travel is submitted for reimbursement at cost, based on state rate for travel (proposer is from Charlotte, so travel expected to be minimal).	Total estimated costs - \$3,900. Minimum costs of facilitated sessions is \$2,400 (which excludes preparation time) Preparation Costs: Assuming facilitator meets with Committee for up to 1 hour to determine goals and process, and then spends 2 hours per session preparing - 5 Hours of Preparation	Proposal states: Preparation: Assist the Committee in planning, designing, and coordinating the event. Staff suggests assuming 1 hour for meeting with committee and 2 hours per session for preparation. 5 hours of preparation time billed at non-facilitation rate of \$300/hour=\$1,500 .	Yes	Included	All Dates provided in RFP	None	Included	Durham Housing Authority (DHA is autonomous from City of Durham – consulted with DHA and low income residents). City of Lynchburg, VA (Managing diversity). City of New Orleans/St. Helena (Diversity training for education officials). City of Charlotte (Consulted on transition from public housing to home ownership).

			Time which is \$1,500.							
Consulting Firm or Entity	Principal Consultant	Cost Elements	Estimated Cost for Both Sessions	Pre Meeting Consulting and Fee	Provided Background Info	Session Format	Available Dates	Disqualifications	Previous Engagements	Recent Clients
WPR Consulting, LLC	Willie Ratchford	\$4,250 - \$4,500 with travel and accommodations as needed for In-Person Facilitations (as proposer is from Charlotte, anticipated travel costs should be minimal)	\$4,250 - \$4,500 (as proposer is from Charlotte, anticipated travel costs should be minimal)	Proposal states: Committee Member Consultations and Consultations to Develop a Community Vision and Community Expectations and Strategies to Address Race/Racism in Monroe Cost: Included in \$4,250 / \$4,500	Yes	Yes	Monday, December 7, 2020 Monday, January 11, 2021 **Selected dates above are preferred, however, can be available on all dates listed in RFP.	None	Included	City of Winston-Salem (Currently working on comprehensive diversity, inclusion and equity program to address allegations of systemic racism in First Department) City of Rocky Mount (Conducted four community conversations to discuss existence of confederate monument in community) City of Fayetteville (conducted community conversations about existence of Confederate

										monument in City seal). City of Raleigh (Conducted community conversations related to race and police community relations). Additional projects involving North Carolina and Virginia cities.
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CONSULTANTS SENT RFP THAT DID NOT SUBMIT A RESPONSE

	Consulting Firm or Entity	Principal Consultant	Notes
	Director Facilities Management	Ulanda Baker	Received email stating that she was unable to meet the deadline.
	Associate Professor at Georgia State University	Dr. Gholdy Muhammad	Received email stating that she did not have time to respond.
	Keep Evolving Consulting	Kamella Emmanuel	Received email stating that she could not respond due to family emergency.