

## Advancing Diversity, Equity, and Inclusion

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# Advancing Diversity, Equity, and Inclusion Through Coaching and Navigation: Insights from Convening Panelists



Human Services programs across the country are using coaching and navigation to help participants seek upward mobility. Coaches and navigators partner with participants to increase their opportunities to thrive in education, work, and life, and achieve their personal and economic goals. In response to the need for advancing diversity, equity, and inclusion (DEI) in the provision of coaching and navigation services, the Bill & Melinda Gates Foundation partnered with Mathematica to conduct two virtual convenings in July 2021. The first convening included perspectives from leaders of programs that offered coaching and navigation to people seeking upward economic mobility. The second convening included perspectives and experiences from coaches, navigators, and participants in these programs. Both convenings included panelists from three coaching and navigation programs serving adults receiving Temporary Assistance for Needy Families (TANF), unemployed workers, and youth

(Exhibit 1). The objectives of the virtual convenings included the following:

- / To share the lived experience of program leaders, coaches and navigators, and program participants in advancing equitable coaching and navigation practices
- / To highlight promising policies, procedures, and practices for advancing DEI in programs
- / To inspire program leaders and direct service staff to take action to advance DEI in their work

This brief presents insights shared by panelists during the convenings and our suggestions for how funders can advance DEI within these programs. These insights can inform other coaching and navigation programs on how they might consider advancing DEI in their own programs and how program funders might support their efforts.

## Exhibit 1. Programs represented at the convenings

### Philadelphia Employment, Advancement and Retention Network (EARN)

Administered by Philadelphia Works, Inc., Philadelphia's Workforce Development Board, [EARN](#) provides coaching to work-ready TANF participants. Coaches use [Goal4 It!](#), a standardized science-informed coaching model, to support participants in goal setting and achieving economic stability. Coaches are employed by four different contracted service providers, serving about 6,000 people yearly.

### Baltimore Health Corps Initiative

Administered by the Mayor's Office of Employment Development, the [Baltimore Health Corps](#) was created in partnership with the city's health department and local agencies to provide paid transitional jobs for job seekers. Job seekers are hired full time by the Baltimore City Health Department as contact tracers and care coordinators to manage the spread of the coronavirus in Baltimore. Career navigators help Baltimore Health Corps employees transition to competitive work after the program.

### Comprehensive Case Management and Employment Program (CCMEP) Life in Transition

In Clark County, Ohio, the Ohio Jobs and Family Services administers [CCMEP](#), a statewide program, using coaches to help youth with low incomes engage in work and education to achieve economic mobility. During the pandemic, CCMEP hired youth interns who helped co-create a program for youth participants called Life in Transition. Youth interns, supported by coaches, lead weekly sessions about career exploration, goal setting, and networking, among other topics.

## Insights from program leaders on how to advance DEI in coaching and navigation programs

At the first convening, program leaders were asked how they can advance DEI in their programs. One program leader noted that good coaching and career navigation advance equity because, "Career navigation and coaching is exactly about giving people those supports to help eliminate those barriers and that's steeped in equity—giving people [what] they need to be successful at their jobs." Here are the specific recommendations from panelists:

### Hire coaches and navigators who are empathetic and mirror the diverse backgrounds of participants

Panelists noted that coaches and navigators are at the core of their programs, and their attributes and skills are crucial to advancing DEI within their programs and thereby advancing equitable outcomes among their participants. Hiring diverse staff who mirror the different backgrounds and experiences of participants may help participants feel more con-

nected to their coaches and navigators, as they did in Clark County's youth program.

Panelists also recommended hiring empathetic staff who understand that participants have diverse strengths and challenges and need varying levels of support, rather than providing the same services to all participants. An individualized approach to coaching and navigation promotes equity by acknowledging and responding to the unique needs of each participant. Coaches and navigators who are empathetic and have similar life experiences as participants may better understand participants and be less likely to judge them for their circumstances.

“Each person is different, so one person might need more supports and navigation than another person in order to achieve the same results, and that's ultimately what equity is about. The career navigator has to have that level of empathy to understand that this person may need more support than the next person.”

– Program leader

### **Value the lived experiences of coaches, navigators, and participants by collaborating on program design and implementation**

Panelists expressed the importance of valuing the perspective of both program participants and the coaches and navigators implementing the programs. Program leaders can provide opportunities to gather input on program implementation by setting aside regularly scheduled time for coaches and navigators to share ideas on how best to deliver services, as they do in the Baltimore Health Corps in weekly staff meetings. Collaborating with coaches and navigators who are on the frontline of service delivery creates space for improving implementation by incorporating the experiences and perspectives of those closest to the work.

Another way to promote equity in programs is to include participants in the design of a program from its inception. In Clark County, coaches and navigators led the development of a new program by directly including youth participants in the program design and asking them what they needed from the program, rather than telling them or assuming what they needed. By responding to youth's expressed desire for coaching and navigation as well as a transitional job, the Baltimore Health Corps included a DEI lens from the beginning.

“Even though expanding room at the table may feel uncomfortable, it makes for a richer experience and a product that is actually where you want it to go.”

– Program leader

### **Practice consistent and honest self-reflection and be intentional about changing organizational culture**

Panelists described how advancing DEI requires a culture change. Rather than “half-baked initiatives,” panelists noted that leaders need to acknowledge how agency policies, practices, and biases may not advance and may even hinder DEI. A panelist noted that to change the culture within their own organizations, program leaders must be willing to do the hard work of self-reflection before taking action. In Philadelphia, they hired a DEI consultant, administered staff culture surveys, and formed a DEI committee with specific goals to act as an example for other employers. Another example of self-reflection is to examine program policies and practices with a DEI lens to understand how services may not have been created with equity in mind, and in some cases may be harmful for participants. By acknowledging that services or policies may not have been created to promote equity, program leaders can better understand how to address program changes.

Lastly, program leaders can try to change the culture of their employer partners by reversing the narrative that participants do not want to work and advocating on behalf of participants.

“Let’s be realistic about what types of jobs we’re throwing at participants that aren’t sustainable and then blaming them for not taking it. I push DEI by speaking the truth to what we’re seeing and experiencing and reversing the narrative in a lot of ways.”

– Program leader

### Tips from coaches, navigators, and participants on advancing DEI

At the second convening, coaches, navigators, and participants provided the following tips to advance DEI in coaching and navigation programs.

#### Create an environment where participants can share freely without judgment

Coaches and navigators shared that they make efforts to create an environment for participants to open up to them. They strive to keep interactions between participants conversational, without giving orders or telling participants what to do. By being conversational and nonjudgmental, coaches create a safe space for participants to express themselves. Participants said that not feeling judged by coaches allows them to be their "authentic self." Coaches also said that keeping an open-door policy that allows participants to contact them outside of their formal meeting times encourages participants to reach out to them when they need something.

“How I want someone to treat me is the way I treat them. I never judge what kind of career choice they may have, or wherever that background may be.”

– Program coach

#### Take the time to build individual relationships with participants

Coaches and navigators discussed the importance of developing relationships with participants, which requires getting to know participants as individuals. Participants said that coaches and navigators can foster relationship building by showing interest in their hobbies and dream jobs. Coaches and navigators noted how in their meetings they make time to

talk about topics that are important to each participant, rather than solely focusing on employment activities. Coaches and navigators share frequent encouragement, particularly when participants share their hopes and dreams. Another way to build relationships with participants is for coaches and navigators to be proactive in sharing opportunities with participants aligned with their interests, which makes participants feel like their coach is thinking of them and their best interests.

“I have learned that encouragement does wonders for people to actually trust that you see them for more than a number.”

– Program coach

#### Cultivate trust with participants in every interaction

Trust is at the heart of relationships, and participants expressed how consistency and follow-through help build trust with their coaches and navigators. Participants discussed the value of consistent meeting times with staff and predictability in how their meeting time will be used. Participants appreciated coaches following through on their commitments, and coaches and navigators agreed that following through on what they say they will do for participants helps keep participants motivated and gives them hope. Coaches and navigators can also develop trust by asking questions like, "Did anything change here? Do we need to update these goals? Where are you on your personal steps toward these goals, and what are we doing to support you on these goals?" Participants said having coaches and navigators who hold them accountable is helpful so they can reach their goals.

### Challenges programs faced and opportunities for funders to advance DEI

Program leaders raised several challenges related to advancing DEI. In line with their insights, we suggest some opportunities for funders to engage and advance effective practice and programs.

/ **Funders often don't require programs to focus on DEI.** One program leader noted that their funders often prioritize meeting compliance requirements and reporting outcomes and do not prioritize DEI requirements or initiatives. Funders can take action to move programs beyond compliance to transformational change anchored in DEI principles.

✔ **Funder opportunity:** Funders can request clear evidence-based DEI outcomes showing that programs are centering equity in service delivery. Funders can prioritize DEI in grant agreements and offer supports in developing and implementing equity-focused goals.

/ **Infusing DEI principles at all levels requires diversity at the top.** One program leader said DEI initiatives can only be successful if leaders and administrations are also diverse, including funders, management boards, top-level implementation teams, and staff working with customers.

✔ **Funder opportunity:** Funders can make efforts to increase diversity within their organizations and ask grantees to describe the diversity of their leadership and board members.

/ **Implementing program changes requires staff commitment and oversight.** One program leader noted that ensuring their program's DEI-related changes are implemented with fidelity is challenging due to the size of their system, which includes a few hundred staff contracted through provider agencies.

✔ **Funder opportunity:** Funders can provide technical assistance to organizations that lack the capacity to monitor and evaluate implementation of their own DEI standards. Funders can also invest in training opportunities and capacity-building partnerships to launch and sustain DEI goals.

### A way forward to advance DEI

Unpacking what DEI means and looks like for programs, staff, and participants in a sustainable, authentic way takes both time and a culture change, which requires a commitment to reflective practices in and across teams. As a program leader said, "DEI is a lot harder than coining the term that makes it seem like it's happening." In addition to the insights shared throughout this brief, program leaders recommend that agencies hoping to advance DEI in their programs remain open to change, which requires a level of flexibility and empathy because everyone is in a different place on their DEI journey. One program leader also recommends preparing for and accepting the discomfort of engaging in this work: "There are times that have felt uncomfortable to me, but I've learned to push through that to do the work that we need to do."

The Economic Mobility and Opportunity strategy, funded by the Bill & Melinda Gates Foundation, aims to increase economic mobility and opportunity for those living in poverty across the United States. In June 2020, the foundation partnered with Mathematica to conduct a virtual convening on coaching and navigation. Four resources developed from this convening:

- [Coaching and Navigation Convening Summary](#)
- [Equity in Coaching and Navigation](#)
- [Evidence in Coaching and Navigation](#)
- [Technology in Coaching and Navigation](#)

This brief is funded in part by the Bill & Melinda Gates Foundation. The findings and conclusions contained within are those of the authors and do not necessarily reflect positions or policies of the Bill & Melinda Gates Foundation.