Equity In Action:
Developing Equity Tools
January 25, 2022

sustainability PROGRAM

Toolbox Tuesdays

www.scag.ca.gov

SCAG™
INNOVATING FOR A BETTER TOMORROW

Session Logistics

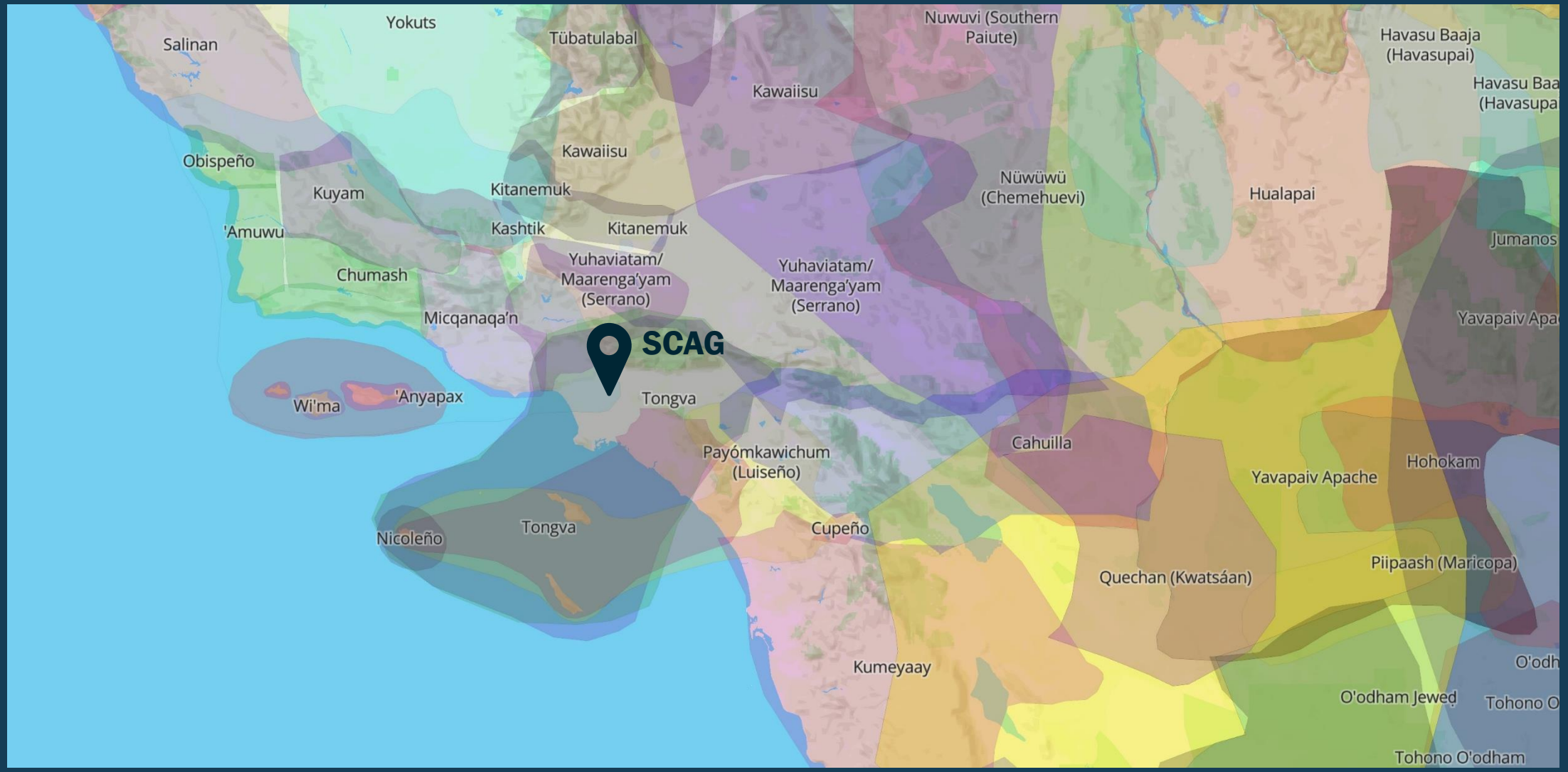
The meeting will take approximately 1.5 hours.

All participant lines will be muted.

If you have a question during the presentations, please type it into the chat box.

A recording of this session, the PowerPoint slides, and additional resources will be available on the SCAG website. We will send a link to everyone who has registered after the session.

Land Acknowledgement



Agenda

1. Welcome — 1:00 – 1:05 p.m.

   Anita Au (she/her/hers), Senior Regional Planner, Southern California Association of Governments (SCAG)

2. SCAG's Racial Equity Tool(kit) — 1:05 – 1:35 p.m.

   Anita Au (she/her/hers), Senior Regional Planner, SCAG
   Anikka Van Eyl (she/her/hers), Junior Planner, SCAG
   Annaleigh Ekman (she/her/hers), Assistant Regional Planner, SCAG

3. LA Metro Equity Tools — 1:35 – 2:05 p.m.

   KeAndra Cylear-Dodds (she/her/hers), Executive Officer, Equity and Race, LA Metro

4. Q&A Session — 2:05 – 2:25 p.m.

5. Session Wrap Up — 2:25 – 2:30 p.m.

   Anita Au (she/her/hers), Senior Regional Planner, SCAG

Today's Objectives

You will leave this session learning more about …

- What an equity tool is
- How equity tools can be used
- How to use different equity tools
- How to develop or adapt an equity tool that fits the needs of your jurisdiction or organization

We want to know…

1) Who is in the room?

2) Does your organization have resources dedicated directly to equity work?

Fill out the poll on your screen!

Racial Equity Toolkit

Southern California Association of Governments

Toolbox Tuesday
January 25, 2022

www.scag.ca.gov

SCAG™
INNOVATING FOR A BETTER TOMORROW

Setting Clear Objectives

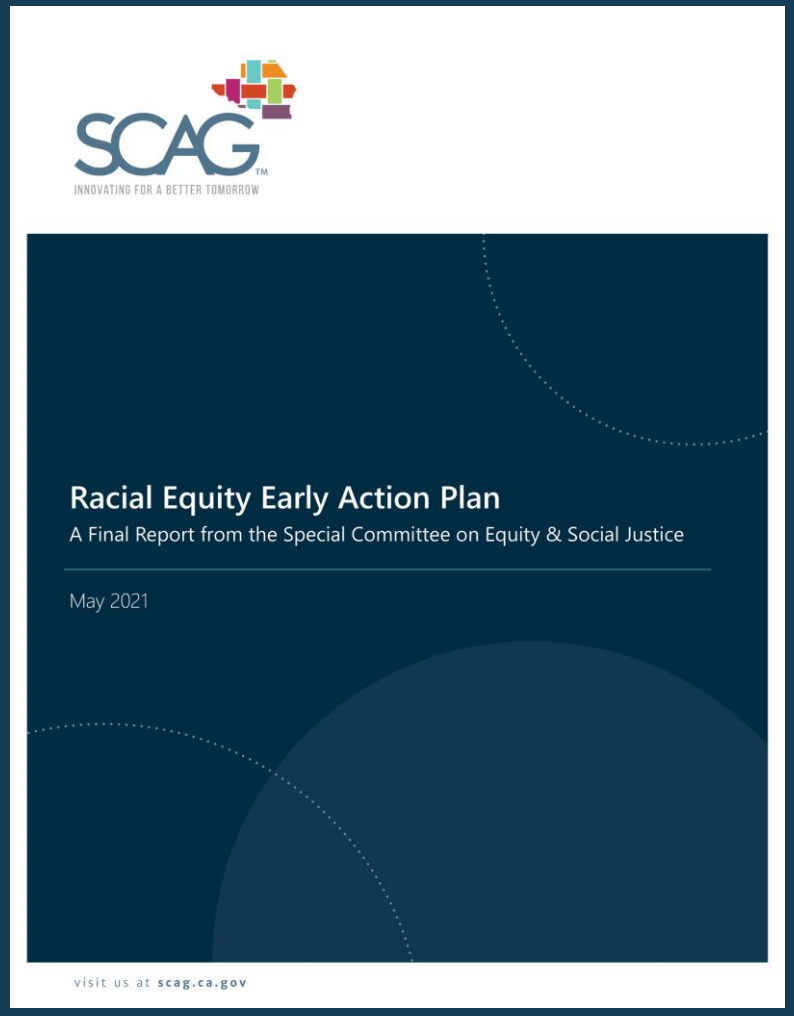
Questions to consider before deciding to develop an equity tool:

- ✓ Does your jurisdiction/organization need to ***develop*** an equity tool?
- ✓ Who is the ***audience*** of the tool?
- ✓ What tools will be ***useful*** for your jurisdiction/organization?
- ✓ ***Where/when*** can these tools be applied?

What is an equity tool?

Equity tools are designed to **integrate explicit consideration of racial equity into decisions**, resulting in more **equitable, accountable, and transparent** outcomes.

Why build a Racial Equity Tool (RET)?



GOAL 3 | ENCOURAGE RACIAL EQUITY IN LOCAL PLANNING

Listen & Learn	Engage & Co-Power	Integrate & Institutionalize
• Support data requests, create tools for information sharing • Expand Toolbox Tuesday trainings to include sessions on racial equity • Provide elected officials with fact sheets and tools to promote racial equity	• Provide resources for CBO engagement in Local Planning - e.g., Call for Collaboration, Go Human Mini-Grants • Build planning capacity in low-resourced jurisdictions by providing staff support - e.g., Civic Sparks, Public Health Fellows	• Refine equity goals and evaluation criteria used in Sustainable Communities Program • Provide resources through the Sustainable Communities Program to promote Environmental Justice • Identify opportunities to incorporate equity analysis in development of 2023 FTIP

Our Purpose:

Develop racial equity tools to integrate the **explicit consideration of racial equity** in plans, policies, practices, programs, and budgets.

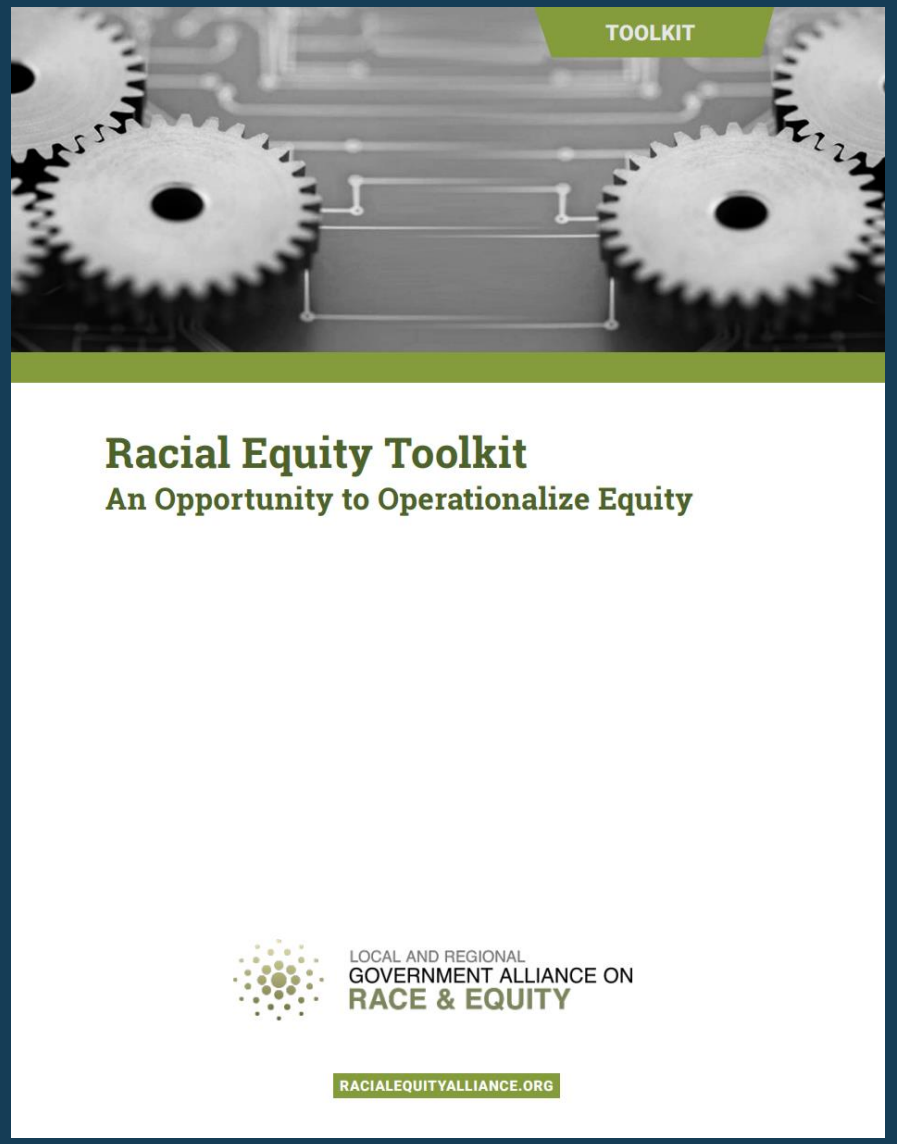
Our Process

Research
Development + Review
Case Studies + Pilot Projects
Training + Next Steps

STEP 1

Research

Step 1: Research - Literature Review



Reviewed **19 Racial Equity Tool(kit)s** from 15 agencies and non-governmental organizations.

GARE's **Racial Equity Toolkit** is the main reference for most RETs developed by government agencies.

Six Step Process:

1. Proposal
2. Data
3. Community engagement
4. Analysis and strategies
5. Implementation
6. Accountability and communication

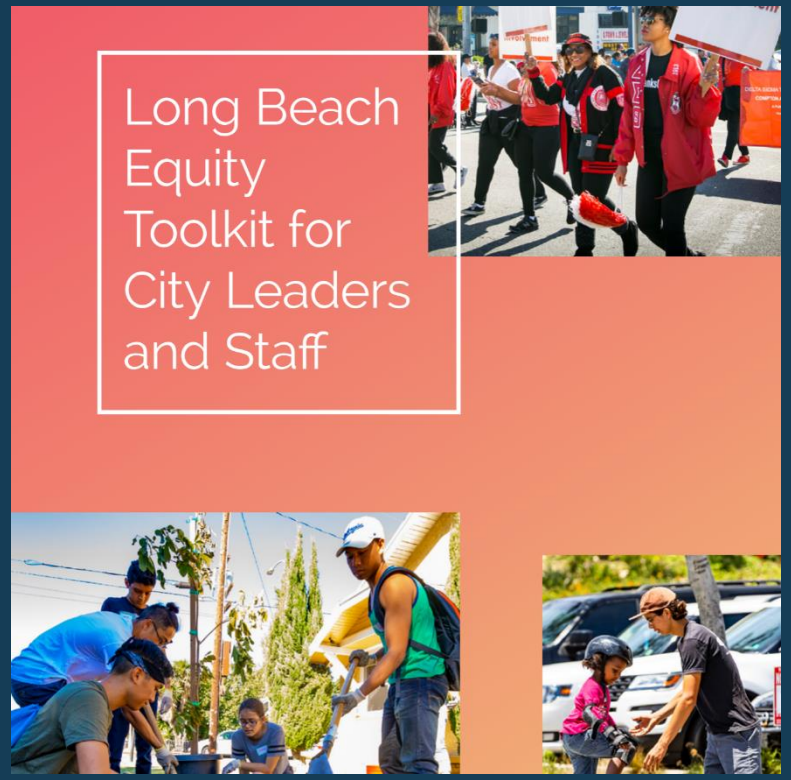
RESEARCH

Step 1: Research – Interviews

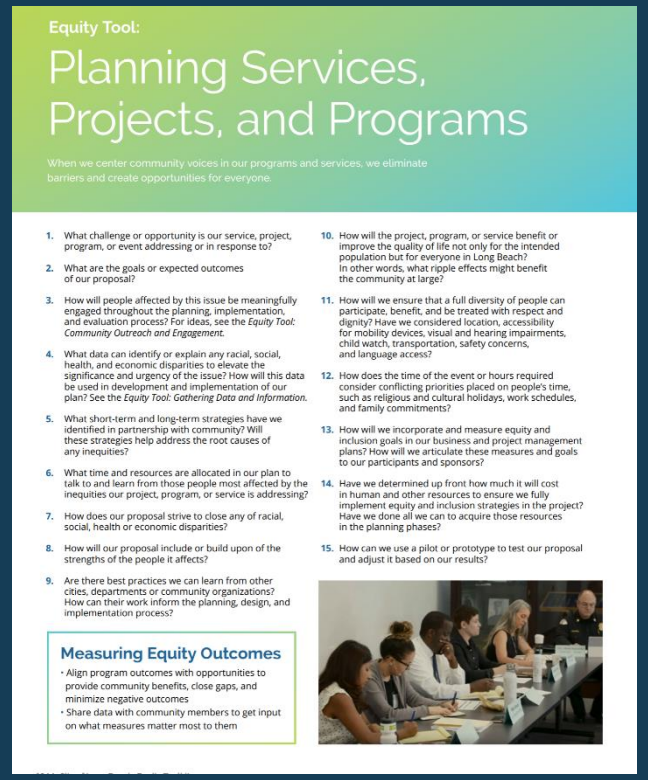
- City of Portland, Racial Equity Toolkit
- California Office of Planning and Research, Resiliency Guidebook Equity Checklist
- City of Long Beach Office of Equity, Long Beach Equity Toolkit for City Leaders and Staff
- Oregon Metro, Strategic plan to advance racial equity, diversity and inclusion

RESEARCH

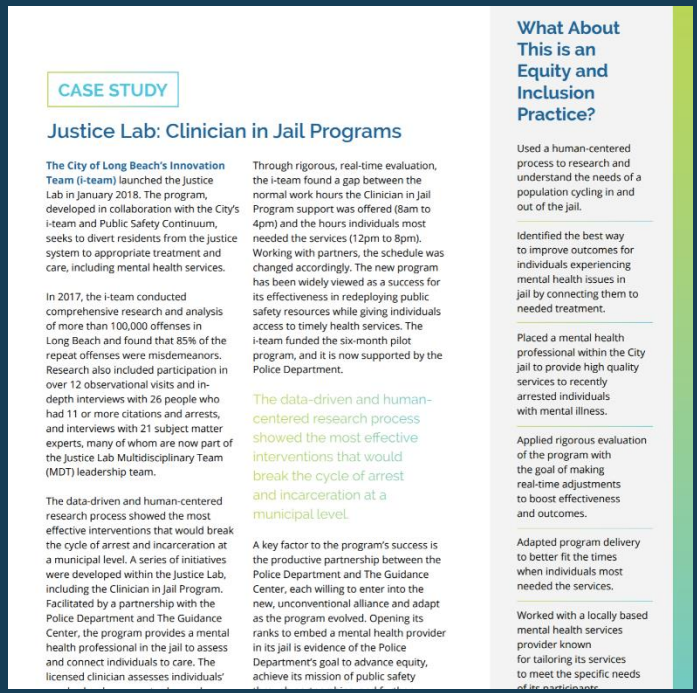
EXAMPLE: City of Long Beach Equity Toolkit



Long Beach's Office of Equity emphasized applying an **Equity Lens** throughout their toolkit



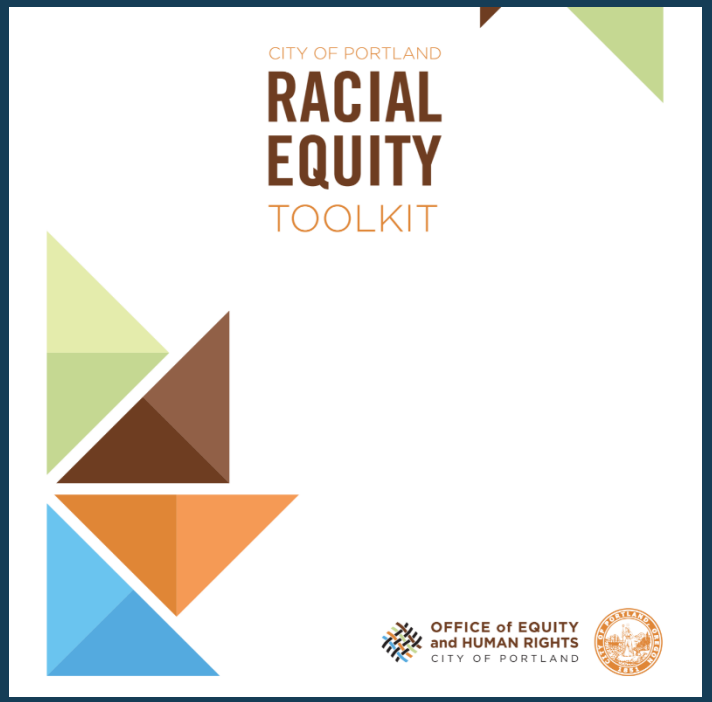
Includes **9 task-specific tools**; each includes a set of questions and resources

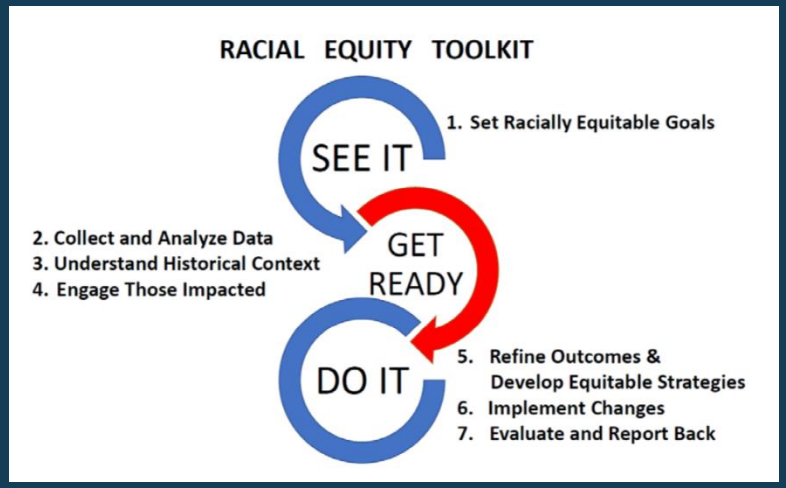


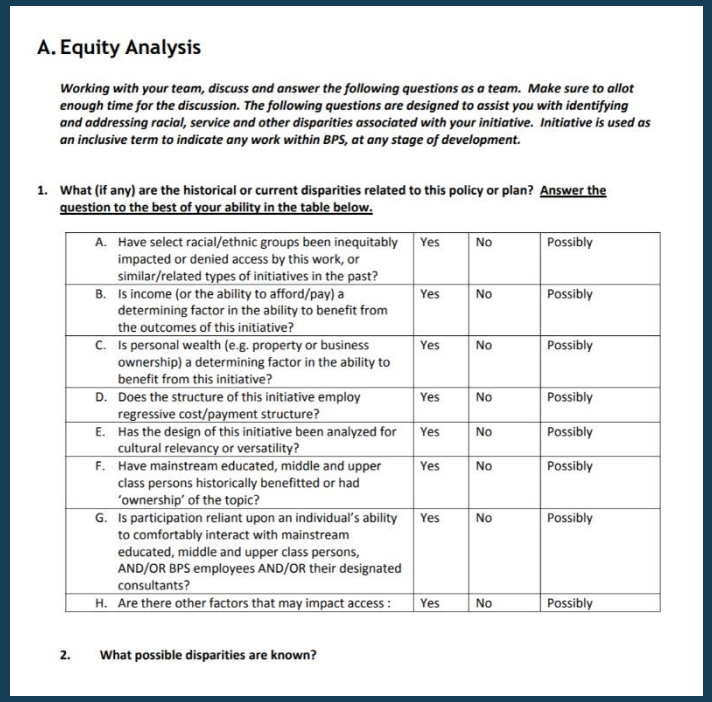
Each tool has a **case study** to demonstrate how an equity lens can be applied in practice

Source: City of Long Beach Office of Equity, Long Beach Equity Toolkit for City Leaders and Staff

EXAMPLE: City of Portland's Racial Equity Toolkit







A. Equity Analysis

Working with your team, discuss and answer the following questions as a team. Make sure to allot enough time for the discussion. The following questions are designed to assist you with identifying and addressing racial, service and other disparities associated with your initiative. Initiative is used as an inclusive term to indicate any work within BPS, at any stage of development.

1. **What (if any) are the historical or current disparities related to this policy or plan? Answer the question to the best of your ability in the table below.**

A. Have select racial/ethnic groups been inequitably impacted or denied access by this work, or similar/related types of initiatives in the past?	Yes	No	Possibly
B. Is income (or the ability to afford/pay) a determining factor in the ability to benefit from the outcomes of this initiative?	Yes	No	Possibly
C. Is personal wealth (e.g. property or business ownership) a determining factor in the ability to benefit from this initiative?	Yes	No	Possibly
D. Does the structure of this initiative employ regressive cost/payment structure?	Yes	No	Possibly
E. Has the design of this initiative been analyzed for cultural relevancy or versatility?	Yes	No	Possibly
F. Have mainstream educated, middle and upper class persons historically benefitted or had 'ownership' of the topic?	Yes	No	Possibly
G. Is participation reliant upon an individual's ability to comfortably interact with mainstream educated, middle and upper class persons, AND/OR BPS employees AND/OR their designated consultants?	Yes	No	Possibly
H. Are there other factors that may impact access :	Yes	No	Possibly

2. **What possible disparities are known?**

Developed in support of their **City-wide Racial Equity Goals and Strategy**

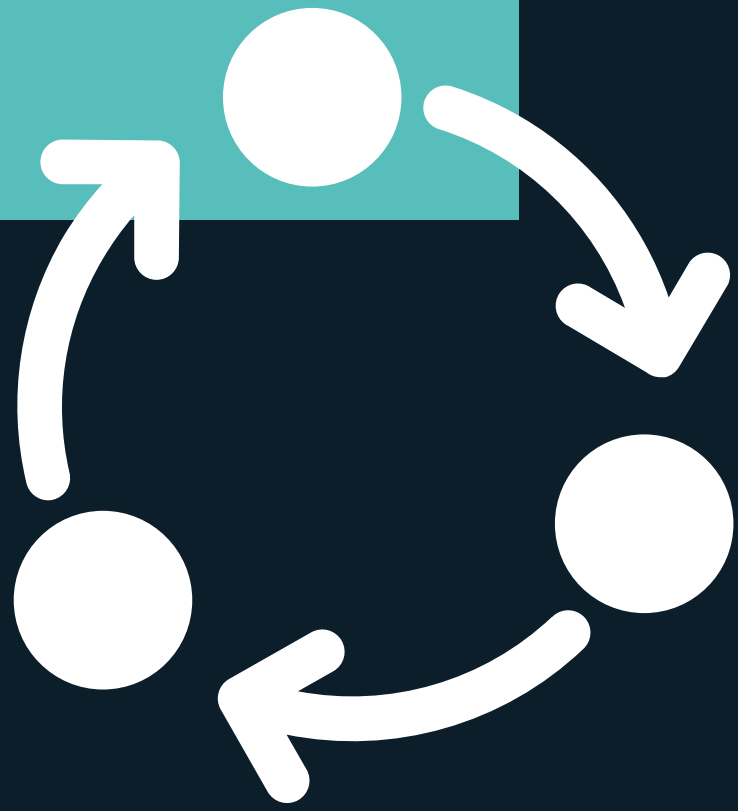
A 7-step tool to promote a **Continuous, Circular, Iterative, Encompassing Process**

The City's **Bureau of Planning and Sustainability** developed their own RET to support their **decision-making processes**

Source: City of Portland, Racial Equity Toolkit and City of Portland Bureau of Planning and Sustainability Equity Toolkit: Decision Support Tool

STEP 2

RET Development + Review



Step 2: Develop a Racial Equity Tool

- Based on GARE's tool
- Simple set of questions
- Applied to any project

- Six different tools
- Aimed at common aspects of planning process

Internal Editing

Consult staff for review

Develop RET

**often back to the drawing board!*

Peer Review

ITERATIVE PROCESS

SCAG's Racial Equity Toolkit

DEVELOPMENT + REVIEW

Equity Assessment

Stakeholder Analysis

Data Gathering + Analysis

Equitable Strategy + Action Tool

Stakeholder Communications

Community Engagement + Relationship Building

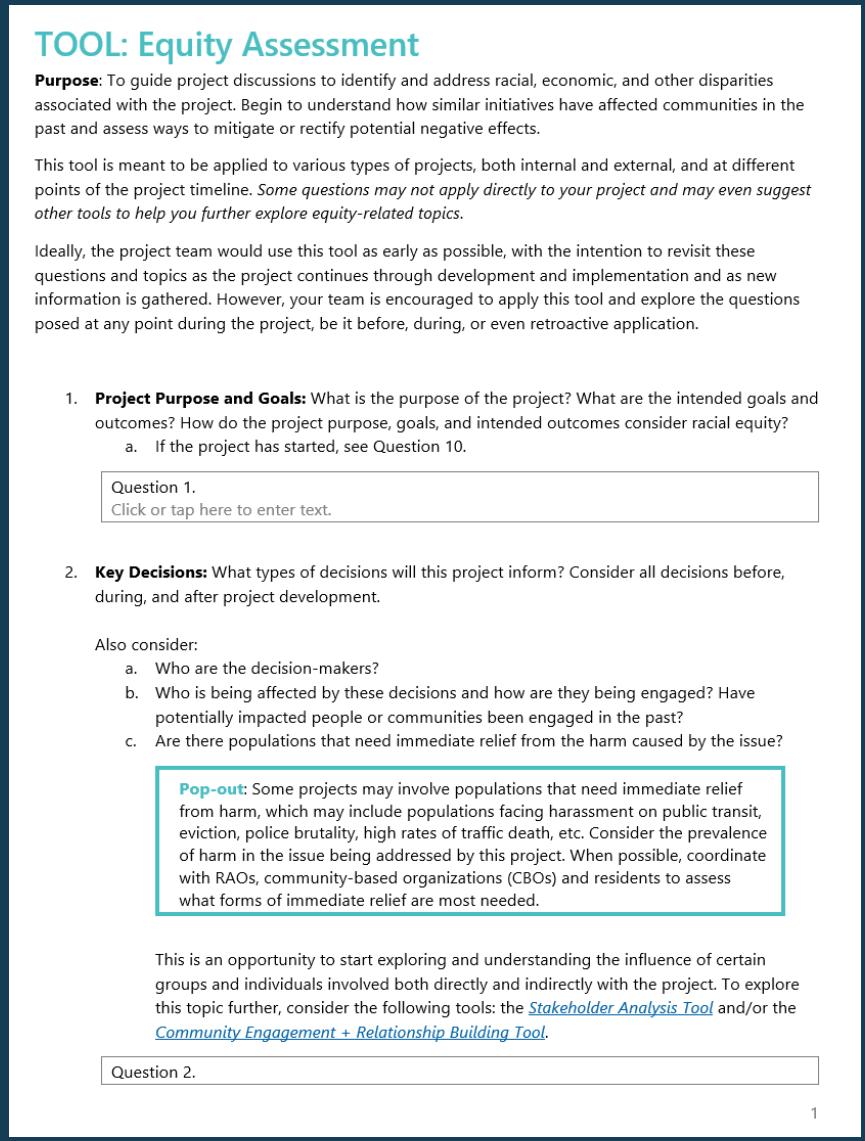
Equity Assessment

PURPOSE

- Identify and address racial, economic, and other disparities associated with the project
- Understand how similar initiatives have affected communities in the past

SAMPLE QUESTION

Have you considered the resources needed to fully integrate and implement equity into this project?



TOOL: Equity Assessment

Purpose: To guide project discussions to identify and address racial, economic, and other disparities associated with the project. Begin to understand how similar initiatives have affected communities in the past and assess ways to mitigate or rectify potential negative effects.

This tool is meant to be applied to various types of projects, both internal and external, and at different points of the project timeline. *Some questions may not apply directly to your project and may even suggest other tools to help you further explore equity-related topics.*

Ideally, the project team would use this tool as early as possible, with the intention to revisit these questions and topics as the project continues through development and implementation and as new information is gathered. However, your team is encouraged to apply this tool and explore the questions posed at any point during the project, be it before, during, or even retroactive application.

1. **Project Purpose and Goals:** What is the purpose of the project? What are the intended goals and outcomes? How do the project purpose, goals, and intended outcomes consider racial equity?
   a. If the project has started, see Question 10.

Question 1.
Click or tap here to enter text.

2. **Key Decisions:** What types of decisions will this project inform? Consider all decisions before, during, and after project development.

Also consider:
   a. Who are the decision-makers?
   b. Who is being affected by these decisions and how are they being engaged? Have potentially impacted people or communities been engaged in the past?
   c. Are there populations that need immediate relief from the harm caused by the issue?

Pop-out: Some projects may involve populations that need immediate relief from harm, which may include populations facing harassment on public transit, eviction, police brutality, high rates of traffic death, etc. Consider the prevalence of harm in the issue being addressed by this project. When possible, coordinate with RAOs, community-based organizations (CBOs) and residents to assess what forms of immediate relief are most needed.

This is an opportunity to start exploring and understanding the influence of certain groups and individuals involved both directly and indirectly with the project. To explore this topic further, consider the following tools: the *Stakeholder Analysis Tool* and/or the *Community Engagement + Relationship Building Tool*.

Question 2.

1

Stakeholder Analysis Tool

PURPOSE

- Assess who the relevant stakeholders & partners are
- Determine how they will be meaningfully engaged throughout the planning, implementation, and evaluation processes

SAMPLE QUESTION

Identify your stakeholders and their relationship to your work using Inform, Consult/Involve, Collaborate, or Co-Power.

Stakeholder Group	Method of Engagement				Rank Priority of Engagement Please rank the priority of engagement (High, Medium, or Low priority).	Strategy for Engagement Please describe how you will engage each stakeholder group.
	Inform	Consult/ Involve	Collaborate	Co-Power		
Example: SCAG Regional Council	☒	☐	☐	☐	Low priority	Present to RC 1x/year.
General Public	☐	☐	☐	☐		
Racial/Ethnic Groups	☐	☐	☐	☐		
Community-Based Organizations	☐	☐	☐	☐		
Tribal Governments	☐	☐	☐	☐		

Data Gathering & Analysis

PURPOSE

- Assess data collection and analysis methods for opportunities to amplify community knowledge and experience

SAMPLE QUESTION

What are the data gaps? Can the data be further disaggregated?

Data Analysis and Interpretation

8. Does the analysis connect to and affirm the root cause(s) that this project aims to address?

Pop out: Learn more about identifying and understanding the root cause of issues by completing Steps 1 through 3 of the Justice Collective's Equitable Strategy Development Tool.

Equitable Strategy + Action Tool

PURPOSE

- Develop effective and feasible project strategies to enhance benefits and eliminate burdens for stakeholder

SAMPLE QUESTION

How effective are the proposed strategies at improving equity?

2. What are some potential positive (benefits) or negative (burdens) impacts for these stakeholders? *Add these impacts to the respective cells under columns, Benefits and Burdens in* ***Table A***.

Table A: Benefits and Burdens Analysis

Stakeholders or Population Groups	Benefits	Burdens
Add Stakeholder #1	• Add positive impact	• Add negative impact
Add Stakeholder #2	• Add positive impact	• Add negative impact
Add Stakeholder #3	• Add positive impact	• Add negative impact

Stakeholder Communications Tool

PURPOSE

- Encourage inclusive messaging across SCAG communications to ensure all people are heard, informed, and engaged.
- Includes graphics, language, non-visual, etc.

SAMPLE QUESTION

Does the budget include appropriate funding for written translation or oral interpretation services?

Inclusive Messaging

1. Who is the intended audience? What feedback or input do we need from stakeholders? What message(s) are we trying to convey to them?

2. Who is the best person/organization to develop and deliver the message?

   Pop-out: Identify opportunities to work with non-profits and community-based organizations (CBOs) with existing ties to the community and community leaders. Ensure there is adequate funding in the budget for appropriate compensation. For more ideas on equitable engagement, try the *Community Engagement and Relationship Building Tool.*

3. How can we include the intended audience in the development and testing of messages, materials, and strategies, especially if the goal is to reach various racial/ethnic groups?

Community Engagement + Relationship Building Tool

PURPOSE

- Engage the communities impacted by the project using equitable engagement methods
- Allow for strategic and meaningful relationship building that will improve project outcomes for the community

SAMPLE QUESTION

Do we have a strategy for documenting and following up with everyone in the engagement process to ensure they understand how their input contributed to the project?

Part II. Equitable Meeting & Event Logistics

When planning engagement and outreach events, have you considered...

☐ **Is the location(s) of meetings/events accessible, safe, and respectful to all participants and the community or communities within which the meeting/event venues are located?**

- Consider the Tribal Lands the meeting/event is being held on. If a land acknowledgement is being prepared, consider inviting Indigenous stakeholders to lead or shape that statement.

Pop-out: Ensure you understand the history of colonization of the lands and violent removal of Indigenous nation(s) that previously had sovereignty over the land. Consider how SCAG could be committed to respecting and enhancing Indigenous sovereignty. Contact Regional Affairs Officer, Arnold San Miguel, (sanmigue@scag.ca.gov) to learn more about tribal governments in the region.

- American Disabilities Act (ADA) Accessibility: Have you selected a location that complies with ADA regulations? How can you expand beyond basic ADA Accessibility standards to expand inclusivity to a wider range of disabilities (physical, mental, etc.)?
- Neutral Spaces: Consider the neutrality and safety of any space for a diverse array of participants. Strive for locations situated on non-governmental land, and whenever possible, consider gangs' territorial lines to prevent unintentionally excluding certain groups from participating in the event.
- Parking Access: When choosing a location for a potential event, be sure to consider parking access, especially ADA parking access, and include parking instructions in relevant event promotion materials. Offer free or reimbursed parking whenever possible.
- Multiple Locations: Consider hosting multiple locations to ensure proximity to potential stakeholders.

What types of tools would be most useful in your work or agency?

Fill out the poll on your screen!

STEP 3

Case Studies + Pilot Projects

Step 3: Key Tool Users

5 staff

initially identified as "Key Tool Users"

18 staff

provided direct edits and comments on the tool documents

Role of the Key Tool Users:

- Focused feedback on one tool
- Reviewed and attempted to use the tool on their own
- Met with RET Core Team members to discuss and provide feedback

Step 3: Small Group Testing

Held **9 Small Group** Testing Sessions with **29 staff** involved

- 1-hour session for one tool
- RET Core Team Members
  - ✓ walk project teams through tool
  - ✓ facilitated meeting timing
  - ✓ answered questions
- One project team member filled out the tool
- All project team members discussed tool questions

Examples of Staff Feedback

- Need to clearly define some language used
  - Example: Cluster analysis
- Questions were framed in the negative
  - Rephrased to make language more positive and strengths-based
- Too many questions – some repetitive or irrelevant
- Some tools were too long
- Suggestions for where these tools might be helpful

STEP 4

Training + Next Steps

Step 4: Training and Distribution – In Progress

TRAINING + DISTRIBUTION

RET Champion Training

Two 1-hour sessions to develop a working understanding of each of the six RET tools

Departmental Training

30-minute presentation to introduce the RET, locate resources, and provide contacts

Continued Support

- RET Core Team available for consultation
- User guides and glossary
- Recordings of trainings
- Centralized equity resource hub for staff

Step 4: Training and Distribution – In Progress

Roles and Responsibilities of the RET Champions

Attend Trainings

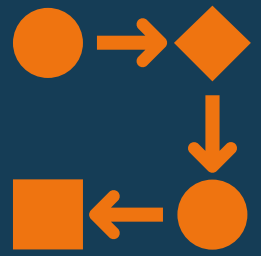
RET Champion Training

Departmental Training

Maintain a working knowledge of RET

Identify potential starting places for a project using RET

Locate equity resources



Available for consultation

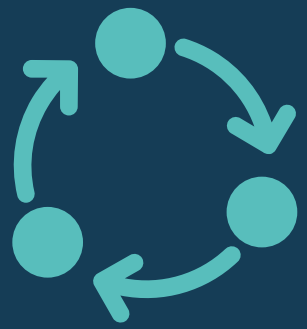
Meeting(s) with project teams to discuss RET

Departmental Liaison

Share new/updated resources

Coordinate with RET Core Team on any issues

Lessons Learned From Developing a Toolkit



- Developing a Racial Equity Toolkit is an **iterative process**
- It is important to **define an audience** to frame the questions and deliverables
- Striking a balance between a checklist and a lengthy questionnaire by creating **multiple tools**

Lessons Learned From Researching Toolkits

- ✓ **Implementation** of RETs is difficult
- ✓ Some agencies aim for staff to **outgrow** the RET
- ✓ **Policy change and buy-in from leadership** is crucial to realizing equitable outcomes
- ✓ Differing opinions on the **quantification** of RET responses
- ✓ There are **great existing tools** that can be immediately applied!

CHECK IN

Now that you've learned more about equity tools, where have you landed?

Fill out the poll on your screen!

Thank you

Anita Au| au@scag.ca.gov
Anikka Van Eyl | vaneyl@scag.ca.gov
Annaleigh Ekman | ekman@scag.ca.gov
Courtney Aguirre| Leslie Cayton

www.scag.ca.gov

SCAG™
INNOVATING FOR A BETTER TOMORROW

LA Metro Rapid Equity Assessment

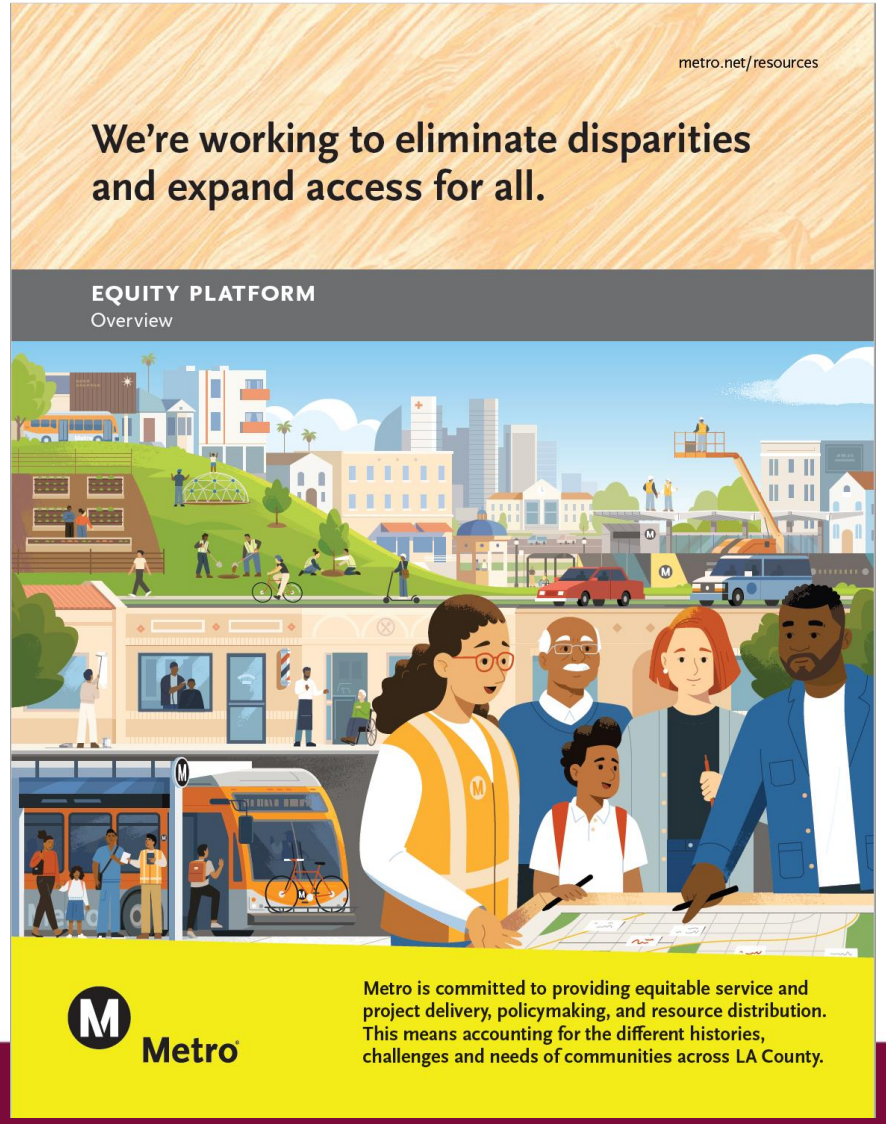
Metro

CHIEF EXECUTIVE OFFICE

KeAndra Cylear Dodds, Executive Officer
Cyleardoddsk@metro.net

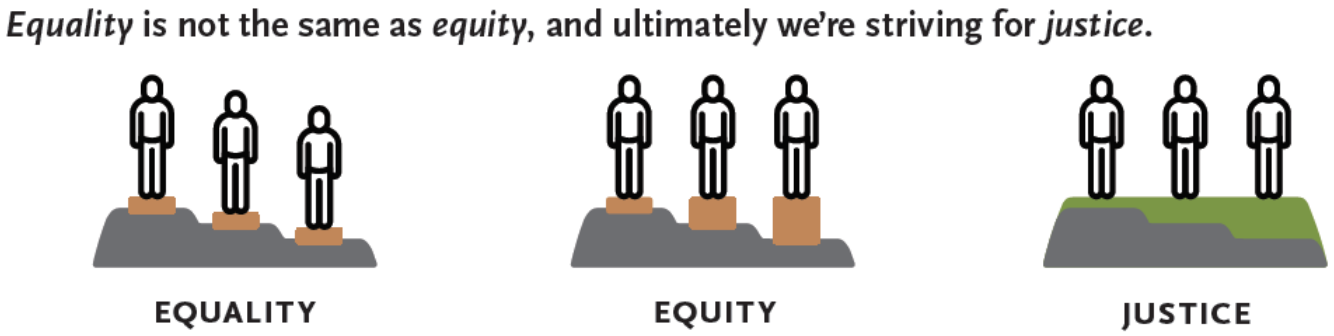
Metro Equity Platform

- Board Approved as of March 2018
- Core Objective:
  - Increase access to opportunity
- Four Pillars
  - Define and Measure
  - Listen and Learn
  - Focus and Deliver
  - Train and Grow



Shared Language and Understanding

Equity is both an outcome and a process to address disparities to ensure fair and just access to opportunities.



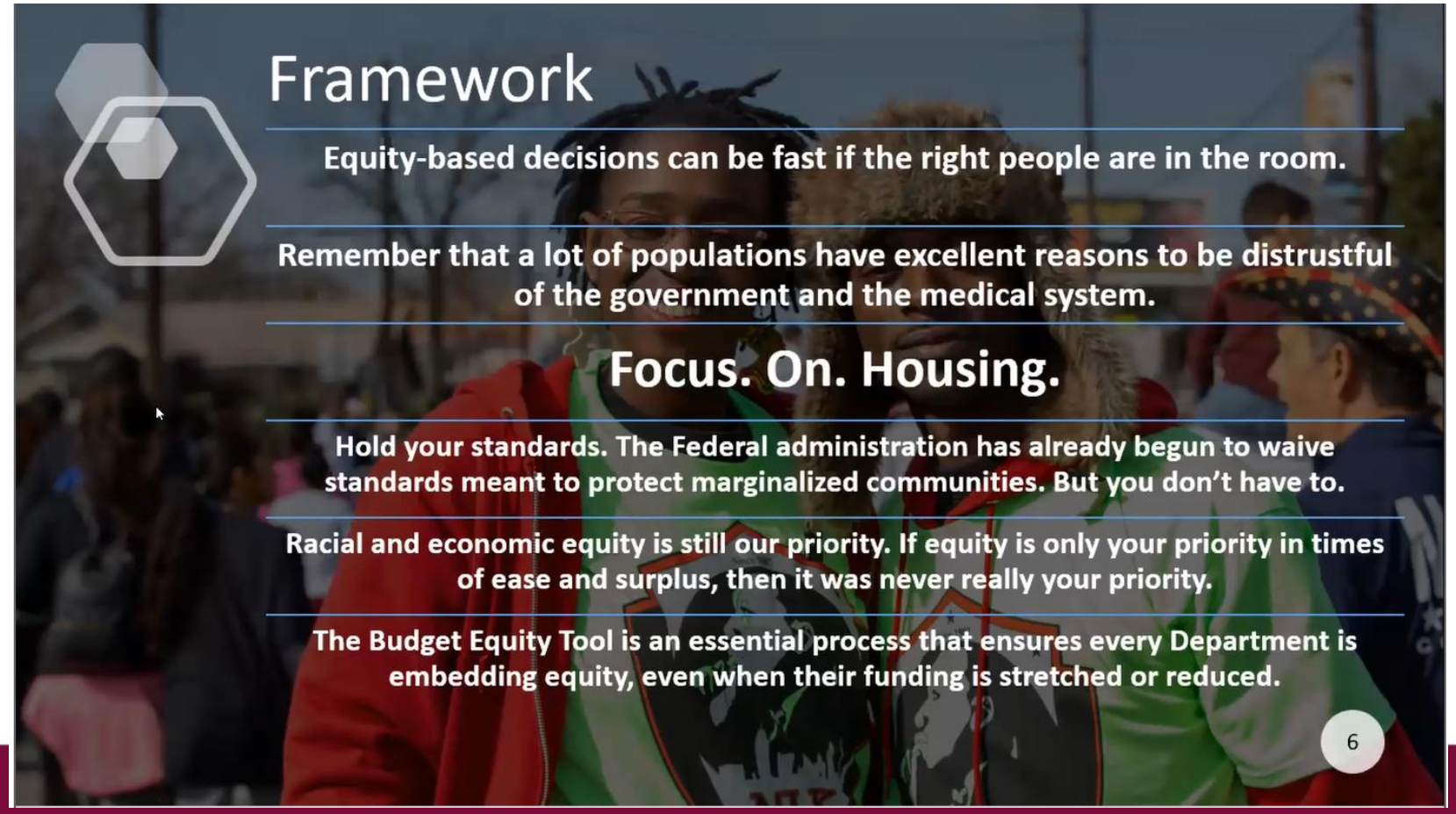
Metro's Equity Tools

- Metro Budget Equity Assessment Tool
- Metro Equity Planning and Evaluation Tool
- **Rapid Equity Assessment**

Rapid Equity Assessment (REA)

- Established in June 2020
- The First Metro Equity Tool
- Developed for quick, preliminary, or emergency assessments

Inspiration for the REA



Rapid Equity Assessment Tool

1) Will the decision being made impact any of the following groups? Will the impacts be employee or public facing?

Options: Black, Indigenous, and/or People of Color, Low Income Households (Avg. income < $35K), People living with disabilities, Equity Focus Communities, Other marginalized groups or those facing disparities (Limited English Proficiency, LGBTQ+, Women, Older Adults, etc.), or Minority or Women Owned Businesses, Disadvantaged Business Enterprises, or Disabled Veterans Business Enterprises

Rapid Equity Assessment Tool

2) Who will benefit from this decision? Are there barriers that will prevent some people from benefiting from this decision? (Ex: physical ability, affordability, etc.) Also explain the benefits of the decision.

Rapid Equity Assessment Tool

3) Who may be harmed or burdened by this decision, even if unintentionally? (Ex: certain users of the service, people living along the project area, etc.)

Rapid Equity Assessment Tool

4) How will this improve equity outcomes? Are there any positive impacts for marginalized or vulnerable groups? Will this reduce negative impacts?

Rapid Equity Assessment Tool

5) What are your strategies to mitigate any potential negative consequences of this decision? Please include specific examples related to community engagement, messaging, outreach, etc. If unknown now, revisit this tool if unintended negative consequences occur.

Rapid Equity Assessment Tool

6) What community engagement and data informed your REA and how will you proceed to ensure equitable outcomes? Discuss how community members, including those more vulnerable to negative impacts, were and will continue to be engaged, and how you will track impacts to impacted people over time.

Rapid Equity Assessment Tool

7) Summarize the impacts of your action, including potential benefits (Q2) and burdens (Q3) to marginalized or vulnerable groups, ability to improve equity outcomes (Q4), mitigation strategies, if needed, (Q5), and data and community engagement considerations (Q6). Use this summary for any report, including a board report, or other document explaining the decision or recommendation.

How do we use the REA today?

- Board Report Equity Assessments
- Preliminary or Exploratory Decisions
- Default Tool

Metro's Equity Tools

- Metro Budget Equity Assessment Tool
- Rapid Equity Assessment
- Metro Equity Planning and Evaluation Tool

Lessons Learned

- Training is Key
- Tools can evolve
- An Equity Toolkit is ideal
- Internal Buy-in is critical

Questions?

Q&A Session

Equity Working Group

Thursday March 24, 2022 | 1 – 3 PM

Topics include:

- Community engagement toolkit
- Equity Resource Guide
- Connect SoCal

Register here: https://scag.ca.gov/regional-planning-working-groups
For more information, please contact Anita Au at au@scag.ca.gov

What Toolbox Tuesdays or additional resources could be helpful for you?

Fill out the poll on your screen!

Tell us how we did!

Take a quick 2-minute survey to help us improve future Toolbox Tuesdays!

Additional Resources

- California Governor's Office of Planning and Research Equity Checklist
- Government Alliance on Race and Equity Racial Equity Toolkit
- Greenlining Institute Racial Equity Toolkit
- King County's Equity Impact Awareness Tool
- City of Long Beach's Equity Toolkit for City Leaders and Staff
- City of Los Angeles Gender Equity Toolkit
- Los Angeles Metro Rapid Equity Assessment Tool
- Los Angeles Metro Budget Equity Assessment Tool
- Michigan's Department of Human Rights Racial Equity Toolkit
- City of Portland's Budget Equity Assessment Tool and Racial Equity Tool
- City of Portland's Bureau of Planning & Sustainability Decision Support Tool
- City of Sacramento Racial Equity and Sustainability Toolkit
- City of Seattle Race and Justice Initiative Racial Equity Toolkit

Thank you

Anita Au | au@scag.ca.gov
Anikka Van Eyl | vaneyl@scag.ca.gov
Annaleigh Ekman | ekman@scag.ca.gov
Courtney Aguirre| Leslie Cayton

www.scag.ca.gov

SCAG™
INNOVATING FOR A BETTER TOMORROW