Rely on us.

TO:	Commissioners Carlson, Barofsky, McRae, Schlossberg, and Brown
FROM:	Frank Lawson, CEO & General Manager; Rodney Price, Asst. General Manager
DATE:	Aug 7, 2023 (Board Work Session August 15, 2023)
SUBJECT:	SD23 Draft Diversity, Equity, and Inclusion (DEI) Policy Review & Discussion
OBJECTIVE:	Discussion

Issue

Based on Board discussions started in 2022, and in support of 2023 Organizational Goal #2, Commissioners and Management wish to develop a guiding DEI Board level Policy.

2023 Organizational Goal 2 reads as follows; "***Workforce and Culture****: Build and inspire a workforce and a workplace culture to fulfill ongoing business obligations and strategic initiatives in alignment with our organizational values by…. **working with the Board of Commissioners to develop and deploy policies that will weave principles of DEI (diversity, equity, and inclusion)** and resiliency into our work."*

Background

Strategic Direction Board Policy #1 (SD1 – see attached) outlines EWEB's Mission, Vision, Values and Legacy. Terms and ideas related to the concepts of diversity, equity and inclusion are included in this document.

In 2021, as part of Commissioners' annual policy review, along with work on revisions to SD15 Climate Change policy, it was recognized that "equity considerations" were not included within EWEB Board policy. Additionally, EWEB Management engaged in facilitated discussions of what diversity, equity, and inclusion could mean to the organization. Consistent with best practice, it was determined that diversity, equity, and inclusion are interrelated and should be considered holistically.

At the February 2022 Board Meeting, General Manager Lawson initiated discussion about development of a DEI Board Policy with the Board of Commissioners.

At the July 2022 Board Meeting, Management provided a correspondence item outlining the results of a peer agency review of DEI work to date among both local organizations that, like EWEB, are members of the Equity and Community Consortium (ECC) and other regional peers in the utility industry and government.

At the March 2023 Board Meeting, Management provided a correspondence item outlining EWEB's participation in the ECC group and the MOU commitments associated with membership.

For the April 2023 Regular Board meeting, Management submitted a correspondence memo providing details on individual interviews with each Commissioner about EWEB's ongoing effort to create a DEI policy.

For the April 18, 2023, Work Session, Management outlined a DEI roadmap for the remainder of 2023 to develop a DEI Board Policy and into 2024 to work on policy implementation.

At the June 14, 2023, Work Session, consultants from the firm, Hathaway Munro provided a 2-hour introduction to basic concepts related to diversity, equity, and inclusion. At this session, questions were asked about a variety of topics including what the term neurodiversity meant as well as what an organization might look like when it was at an advanced stage of incorporating concepts of diversity, equity, and inclusion.

Two background resources that address the two June Work Session questions are included in this packet as supplemental reading. The first is an article from Forbes from February 2022 that defines the concept of neurodiversity and explains the benefits for organizations that embrace differences in the ways its people learn and think. The second is a resource from the [Government Alliance on Race and Equity](#), a non-profit organization of which EWEB is a member. The attached racial equity continuum provides a description of what organizations might look like, across the organizational areas of culture, people and structures, as they move along a journey towards structural transformation. While this resource is focused on race, it can be extrapolated to apply to a wide variety of equity issues.

Discussion
Management submits a draft SD23 Diversity, Equity, and Inclusion Policy for Board review and discussion among Commissioners.

In preparation for this work session, Management reviewed the draft policy with both the Executive Team and EWEB's internal Diversity Team. Feedback from these groups have been incorporated into the draft presented for discussion within this packet.

Recommendation
Management and staff seek feedback on the Draft SD23 Diversity, Equity, and Inclusion Policy.

Requested Board Action
Discussion only.

Attachment(s)
1 – SD1 EWEB Mission, Vision, Values & Legacy
2 – Draft SD23 Diversity, Equity, and Inclusion Policy
3 – Forbes: Neurodiversity and the Workplace, 2/15/2022
4 – Government Alliance on Race and Equity (GARE): Racial Equity Assessment Continuum, 2019

Strategic Direction Policies (SD Policies)

SD1   Mission, Vision, Values & Legacy
Effective Date   October 6, 2022

<u>**MISSION:**</u> EWEB's core mission is to enhance our community's vitality by delivering drinking water and electric services consistent with the values of our customer-owners.

<u>**VISION:**</u> EWEB's vision is to be a local utility that inspires our customer-owners to invest in and rely on us.

<u>**ORGANIZATIONAL CORE VALUES:**</u>

- <u>**SAFE:**</u> We value the safety, and physical and psychological wellness of our workforce and the public, the security and integrity of cyber assets and data, and the protection of our customers' assets.

- <u>**RELIABLE:**</u> We value the ongoing continuous on-demand delivery of quality drinking water and electricity, and the dependability of our response to our customers.

- <u>**AFFORDABLE:**</u> We value and respect our customer-owners' financial resources by making wise investments and controlling costs and rates.

- <u>**ENVIRONMENTAL:**</u> We value the prudent and sustainable stewardship of the environment and natural resources, including preserving our watershed, and our role in reducing the greenhouse gases (GHGs) contributing to Climate Change.

- <u>**COMMUNITY/CULTURE:**</u> We value a culture of intentional actions and outcomes, continuous improvement, diverse perspectives, that is trustworthy, respectful, equitable, and inclusive to employees and community members. We are dedicated to our public service, professions, local governance, and commitment to serve our community honestly and with integrity.

<u>**FUNDAMENTAL LEGACY:**</u> Our values are supplemented by a set of principles and behavioral expectations, as follows:

- Providing affordable products and services
- Caring about our community and the environment
- Continuously improving our efficiency and effectiveness
- Emphasizing customer service and defining value through our customers' eyes
- Treating each individual respectfully
- Providing a quality work environment for our employees

<u>**WE MEET OUR CUSTOMERS' NEEDS BY:**</u>

- Providing reliable and high-quality utility products and services
- Providing services in a responsive manner
- Providing prices and fees that are reasonable and stable

THE ORGANIZATION:

- Uses an integrated planning process based on vision, strategic direction, critical success factors and results management

- Uses innovation and creativity to develop solutions to complex and challenging issues

- Is flexible, adaptive, and learns from prior experiences

- Is financially stable

- Supports excellence in the workforce by providing competitive wages, benefits and development opportunities

WE MEET THE COMMUNITY'S NEEDS BY:

- Dealing effectively with tensions between social, economic and environmental factors

- Demonstrating concern and responsiveness to social issues involving the provision of energy and water services

- Supporting a sound economy through fiscally prudent prices

- Demonstrating sensitivity and responsiveness to environmental concerns; recognizing the importance of a healthy ecosystem to its operations

THE BOARD OF COMMISSIONERS:

- Effectively governs, resulting in clear leadership at a policy level

- Provides direction and makes decisions anchored in a sound assessment of priorities and strategic risks

- Maintains a strong connection to customers and the community

Source: Board Approved 05/04/04; Ratified 04/19/05; Revised 10/6/15, Resolution No. 1527; Revised 09/05/17, Resolution No. 1717; Revised 07/10/18, Resolution No. 1818; Revised 10/05/21, Resolution No. 2116; Revised 10/06/22, Resolution No. 2223.

<div align="center">**Strategic Direction Policies (SD Policies)**</div>

SD23   **Diversity, Equity, and Inclusion (DEI) Policy**
Effective Date   **XX, 2023**

Background

EWEB shall pursue our vision and fulfill our mission in a manner consistent with our values, including the ongoing engagement with our ***Community.*** Embracing and respecting our individual uniqueness and collective ***Diversity*** fosters broad perspectives, creative solutions, and an improved understanding of our workforce and customers, all critical to the fulfillment of our organizational vision and mission.

As a public entity, providing our entire ***Community*** with non-discriminatory ***Equitable*** access to products and services, public participation, governance, and employment opportunities, is fundamental to achieving our mission by ensuring our values are consistently applied. An environment based on ***Inclusion*** creates the collaboration, motivation, and attachment necessary to inspire our Board and workforce, and motivate our customers to use our services and actively participate in our governance processes, essential to sustaining and continuously improving our organization.

Diversity, ***Equity***, and ***Inclusion*** are foundational to our culture and how effectively we apply our values in the pursuit of our vision and fulfillment of our mission.

Definitions as applied to the EWEB ***Community***:

> ***Diversity: the presence and recognition of all aspects of human differences within a group.***

> ***Equity (Equitable): fair and just practices and policies that ensure all have equal access to opportunities to thrive.***

> ***Inclusion (Inclusive): continually creating a welcoming environment where people with diverse identities and experiences feel respected, have a sense of belonging, and can participate and achieve to their potential.***

> ***Community: includes the people with whom we serve, collaborate, influence, or impact in the fulfillment of our mission.***

Primary Directives

Consistent with EWEB's Vision, Mission, and Values (SD1) and other Strategic Direction (SD) policies, along with other policies guiding Governance Process (GP), Board-Staff Linkage (BL) and Executive Limitations (EL), the Board supports a comprehensive approach to continually improving ***Diversity***, ***Equity***, and ***Inclusion***, as defined above, by focusing on the following strategic areas:

- **Access to Products and Services**: The Board authorizes, delegates, and directs the General Manager to ensure that the *Community* we serve has *Equitable* access to products and services at fair non-discriminatory prices.

- **Workforce:** EWEB will rely on workforce, business, and operations management policies and practices to guide and govern conduct and decision-making. Furthermore, the Board authorizes, delegates, and directs the General Manager to ensure these policies exist, are routinely reviewed, and are enforced with the goal to create and nurture a working environment that facilitates productive, *Inclusive*, and respectful workforce engagement through *Equitable* actions, including but not limited to: recruiting and hiring, compensation, promotion and retention, training and skill building, discipline and separation policies, procedures, and practices.

- **Community Engagement**: Furthermore, the Board authorizes, delegates, and directs the General Manager to facilitate productive, *Inclusive*, and respectful *Community* engagement through open, accessible, and transparent communications, and *Equitable* opportunity to participate in our procurement, contracting, governance, and/or public processes.

- **Board of Commissioners:** Commissioners shall adhere to Board Policies, specifically but not limited to: GP1 *Governing Style,* GP2 *Board Job Description*, GP6 *Rules of Conduct,* GP9 *External Communications*, and GP10 *Public Input* in a manner that fosters the organizational and *Community* benefits of *Diversity, Equity*, and *Inclusion* outlined in this policy.

Implementation

According to Board Policy BL1, the General Manager *"is responsible for implementing policies and direction established by the Board"*. To implement this policy, the Board and General Manager will work together to develop annual goals, consistent with Board Policy BL4 and BL5, related to the *primary directives* included herein, as applicable, including milestones and measurements, and reporting frequency.

So that the organization's actions related to this policy are visible to the Board and our *Community*, at least annually EWEB will review and report on the status of tactical activities, strategic initiatives, and annual goals associated with the implementation of this policy.

Neurodiversity And The Workplace

Alan Price
Forbes Councils Member
Forbes Human Resources Council

CEO at BrightHR and COO at the Peninsula Group, responsible for the global rollout of HR tech supporting over 44,000 organizations.

Of all the things I have learned over the years, this is perhaps the most important: Creating an inclusive and diverse workplace culture is fundamental for success.

A workplace made up of employees from different backgrounds, with a range of characteristics and life experiences, who all feel respected, included, valued and comfortable at work is what every employer should strive for. Research from a 2018 Deloitte report found that companies with inclusive cultures were six times more likely to be innovative and agile.

One characteristic that is often overlooked by employers is neurodiversity.

What Is Neurodiversity?

According to Harvard Health Publishing, we can define neurodiversity as "the idea that people experience and interact with the world around them in many different ways; there is no one 'right' way of thinking, learning, and behaving, and differences are not viewed as deficits."

Conditions such as ADHD, dyslexia, dyspraxia and autism are all on the neurodiversity spectrum. With an estimated [15% to 20% of the population](#) being neurodivergent, I strongly believe employers and HR leaders have the power to champion and celebrate the benefits and talents of neurodiverse people. In a world dominated by rising technological advancement and automation, the benefits that come from having an inclusive, neurodiverse workforce have never been greater.

A neurodiverse employee might also be known as a "sensitive striver." Typical characteristics can include a highly attuned central nervous system; people are often both highly sensitive and high achieving, with great potential. All that they need is an employer who can see and embrace this potential and make any adjustments necessary. Not only is this in the interest of inclusivity and diversity; hiring neurodiverse employees could bring significant benefits to your organization.

When companies embrace neurodiversity, they gain competitive advantages in many areas — productivity, innovation, culture and talent retention, to name just a few. A report by JPMorgan Chase [found](#) in *Financial Times* (paywall) that professionals in its Autism at Work initiative made fewer errors and were 90% to 140% more productive than neurotypical employees.

The National Autistic Society says that people on the autistic spectrum have [a variety of exceptional skills](#) that are highly valued by employers, enabling them to thrive in roles ranging from computer programmer to journalist, statistician or sales assistant. In my experience, they often excel at pattern recognition and spotting irregularities, with sustained attention to detail and the ability to focus on complex and repetitive tasks over a long period of time — all of which are highly sought-after skills in business. People with dyslexia

tend to think outside the box and are [more likely to produce innovative and creative ideas](#) — a fantastic quality for companies striving for innovation who like to stay away from the "traditional" approach.

It is also important that employers recognize some of the challenges that neurodiverse people could face in the workplace. A fast-paced corporate environment isn't always conducive to how everyone works, so employers need to make every effort to put reasonable adjustments in place, helping everyone feel included and supported.

Creating A Neurodiversity-Inclusive Workplace

Before any changes are made to the workforce, it's vital for employers to understand the ways in which they can embrace neurodiversity accordingly within their organization. It's important to adopt a mindful approach to the different ways in which people work and communicate. You shouldn't feel unable to talk about neurodiversity in the workplace. When both employers and employees can have open discussions about finding ways to work more inclusively, that helps break down barriers and remove stigmas.

Likewise, it's important to communicate the variety of resources that are available within your business to staff. These could include having quiet areas, being flexible when it comes to break times, having access to an EAP or setting up a mentoring program to help employees grow and succeed.

Managers should be trained and encouraged to offer 1-to-1 support for employees. This helps facilitate open and honest discussion whereby they can identify each person's preferences and enable appropriate avenues of support to be implemented. Simple adjustments such as having a dark mode on screens and apps to help alleviate vision strain or providing specialized

technology to adjust for different ways of reading, such as color filters for screens, can be practical ways to support employees.

Remote working has become the norm for many businesses over the last couple of years, and we've seen rapid changes in the ways in which we communicate. While some have embraced these changes, others have found them more difficult. It's important to make sure you consider what adjustments are in place for homeworking employees, treating them the same way you would treat those who are in the office every day. Online meetings can be made more inclusive by including breaks and minimizing the use of the chat function, to avoid it becoming a distraction with the potential to overwhelm.

Understanding and championing neurodiversity in the workplace enables employers to foster a more diverse, inclusive and successful workforce and allows talent to thrive. Many managers of neurodiverse professionals have [reported developing](#) an increased understanding of the individual needs of all their employees, helping them embrace the talents of everyone in their workplace.

Creating an inclusive working environment where employees feel open and comfortable is key to maintaining a happy and successful workforce and will keep positive company culture alive long term. There will never be a one-size-fits-all approach to accommodate neurodiversity. Everyone has different needs and should be treated accordingly.

https://www.forbes.com/sites/forbeshumanresourcescouncil/2022/02/15/neurodiversity-and-the-workplace

Assessing Your Institution

		DESTABILIZING	DEVELOPING		IMPLEMENTING		SUSTAINING
		Exclusionary	Symbolic	Transactional	Culture Shift	Institutional Evolution	Structural Transformation
		1	2	3	4	5	6
Organizational Characteristics:		Institutionalization of racism includes formal policies, practices, teaching, and decision-making that disadvantages people and communities of color and advantages white people and communities at all levels.	Policies exist to diversify the workplace, but in large part they are not used or not in compliance. Resources are not allocated for implementation or there may be an underlying belief that there isn't a need for anything to change.	Policies and practices are in place to promote multiculturalism and diversity, but largely do not wield the intended results. Will celebrate different cultures, but avoid race and racism overtly as topics.	Policies and practices call out race and seek to eliminate racial bias. There is intentional review of existing policies and practices to understand barriers towards achieving racial equity goals. Policies and practices begin to shift so that there is broad ownership of racial equity initiatives.	Institutional barriers that inhibit progress towards racial equity policies and practices are removed and racial equity proactively advanced. No longer uses race-neutral approach for targeted strategies.	Commitment to racial equity is reflected throughout policies and practices and reinforced at all levels of the organization. Addresses structural racism by collaborating and sharing best practices with other agencies and developing and implementing a collective racial equity agenda.
Culture — Organization Commitment		Organization identifies itself as existing to serve a constituency that intentionally excludes people of color. Through internal and external communications the organization enforces a racist status quo (e.g., mission, vision, policies). The organization is actively complicit in the creation of a racist environment where it is expressed that people of color have no space to voice concerns about potentially racist behaviors in the workplace or programs. A, B	Organizational identity is not explicitly tied to exclusion -- the organization is tolerant of people of color with 'proper credentials and perspective.' Organizational internal and external communications often declare 'we don't have a problem' but may still exclude people of color in contradiction to policies. The organization maintains an environment where people of color do not report problems out of fear for retaliation or further exclusion and, externally, the organization does not engage with communities of color. A, B, I, J	The organization identifies itself as diverse and multicultural. Internal and external communications acknowledge and reflect appreciation for diversity. The organization is relatively unaware of how it perpetuates an environment that continues patterns of privilege, making race uncomfortable to address specifically internally and externally. A, B, D, I, J, K	Organization identifies as working towards racial equity. Commitment to inclusion is formally integrated in internal and external communication. The organizational environment is such that there are some internal initiatives to address institutional and structural racism in both workplace and community relationships, but efforts are often disconnected. Further, a structure and culture that maintains institutional racism is still intact and relatively untouched, frustrating opportunities to advance racial equity internally and externally. A, B, D, E, I, J, K	Organizational identity embraces ongoing learning toward racial equity. Internal and external communications reflect a commitment to continuous learning and organizational development based upon racial equity analysis and inclusion goals. Still, there is some communicated uncertainty about following this path. The organization works toward creating an inclusive environment as staff and financial resources are committed toward building structures and space for staff to address institutional racism. External partnerships are developed to address systemic issues . G, H	The organization sees racial equity and inclusion as an integral component of its identity. Internal and external communications actively address efforts to build inclusion and eliminate institutional and structural racism. Organization maintains an environment where there is a high comfort level and depth in talking about race, and an organization-wide desire to continue capacity building and problem-solving. Intersectionality of race and other social oppressions is well-understood; Organization is nimble and successful at addressing issues at multiple levels. H
Culture — Leadership and Management		Management and leadership communications overtly supports and models exclusive practices. Management and leadership isolate themselves from and/or are retaliatory against staff or outside groups raising issues associated with racial equity including efforts to hold the organization accountable to inclusive practices. Methods to measure or track management/leadership's efforts toward inclusion is avoided and discouraged. B	Management and leadership communicate public support for diversity but are not committed to any internal/external change practices, resulting in racially inequitable outcomes for staff and communities. Management and leadership are not held accountable for equity and inclusion and racial inequities are reinforced through lack of correction or reprimanding unwanted behavior. Efforts to measure or track management's efforts toward racial equity are stunted due to a lack of prioritization. B	Management and leadership communicate a verbal and written commitment to diversity. Management and leadership make promises to achieve diversity or racial equity but there are no internal or exernal accountability processes or structures in place. Or, accountability processes and structures are in place but do not achieve any real, sustained impact. Efforts to measure or track management / leadership's efforts toward racial equity are discussed, models are created, but are not reliably utilized such that institutional racism is perpetuated in the workplace and community. B, F	Management and leadership communicates a desire for a systemic analysis of racism, but may feel isolated and confused about how to strategically move forward. Open support is given to staff to pursue work that is focused on racial equity. Staff and constituents are clear about how to to leverage internal and external accountability systems to raise issues of institutional and structural racism, but system and institutional pressures can easily derail racial equity priorities. Methods to track or measure management and leadership's efforts to advance racial equity goals are in place and are seen as beneficial for some future change. C, F	Management and leadership communications demonstrate support for a culture of racial equity. Internal and external systems are used to hold management and leadership accountable for upholding a culture of inclusion. Methods to measure and track how an inclusive culture is being upheld are in place and are relied upon to support inclusive actions and behaviors. Continue to strengthen C and F.	Management and leadership are markedly clear in their communications about upholding a racially equitable culture. Internal and external accountability systems are in place and are regularly relied upon at all levels to inform how inclusion exists and is further operationalized. Methods to measure and track actions are in place and available to all staff and constituents. Leadership and management understands how to share power and build power of communities of color and also understands how to use power in a way that effectively influences others to take on racial equity actions. Continue to strengthen C and F
People — Workforce — Hiring, Recruitment, and Retention		Explicit action is taken to prevent people of color, immigrants and refugees, and other disadvantaged populations from being hired. No outreach to communities of color for recruitment. Staff composition is majority white and does not reflect the community served. High rates of turnover from staff of color. A, B	Hiring practices assume a race neutral approach. Equal opportunity is interpreted as something that exists without regard to race or other protected classes. Recruitment strategy is skewed, with an affirmative action strategy being regarded as unfairly advantaging people of color and other groups behind closed doors. Staff composition has very few people of color and does not reflect the community served. A, B	Carries out intentional inclusiveness efforts for hiring a diverse staff, but often activities do not produce intended results. Recruits staff of color that are a 'good fit' with the existing organizational culture. Staff composition contains more people of color but does not fully represent the community served. A, B, P, Q	Growing understanding of institutional racism in hiring practices as a barrier to organization goals. Expanded outreach to communities of color for recruitment; diversity is reflected throughout hiring process. The organization is moving toward a diverse staff composition that is reflective of the community served, but has no concrete strategies in place. Diversity of staff is seen as important to achieving organizational goals. Continue to strengthen P and Q	Racial representation is seen as essential and becomes an institutionalized asset. Hiring and recruitment practices are standardized to address racial bias in hiring. Progress towards goals are tracked over time in order to adapt strategies to develop a staff composition that reflects the community served. Job descriptions throughout the organization reflect commitment to racial equity. Continue to strengthen Q	The institution has operationalized equitable recruitment and hiring practies. Staff composition reflects the community served. Opportunities for professional development and growth are distributed equitably. Staff embody the values of an institution commited to racial equity and continue to foster postive relationships amongst diverse communities served. Organization has cultivated career pipelines with partner institutions to develop future qualified candidates from communities of color. Continue to strengthen Q
People — Workforce — Competencies		Workplace policies and leadership do not support staff in building competencies; staff time for training on racial equity and skill development are not provided. The instituition as a whole does not acknowledge racial inequity in it's work. A, B	Workplace policies support and generally encourage periodic training opportunities, but staff are often not given approved time or money to attend training and professional development opportunities. Few staff are exposed to the importance of racial inequity in their work. A, B	All staff are expected to attend training opportunities and group consistently participates in some kind of annual diversity gathering. Information is not reinforced through workplace policies and practices, and employees are left on their own to figure out how to implement skillsets. Staff are exposed to the importance of racial inequity but is not enforced through an action plan. A, B	Organization sponsors racial equity training programs. Workplace policies begin to address racial inequities in the workplace and approaches to work. Racial equity opportunities in policy, service, data practices are identified. Staff time spent with communities is seen as essential component of work. C, N, O	In addition to sponsoring racial equity training, the organization implements metrics to track progress. Evaluation captures the outcomes of new and revamped workplace policies, captures changes in staff attitudes and rewards racial equity skillsets including cultural responsiveness and humility. Staff understand how to effectively work with communities and the institution. These competencies are shared with other institutions. Continue to strengthen O and U, X	Workplace policies support innovation to better meet the organization's mission towards racial equity. Through training and additional education opportunities, staff feel supported and are self-motivated to continue developing racial equity skillsets. The organization is not only continually learning and adapting, but is sharing and initiating learning processes with the community and other agencies. Continue to strengthen X and U
Community — Access, Involvement and Partnerships		Community engagement processes are responsive to more affluent / white communities. Intentionally and publicly enforces hierarchy and excludes communities of color from participating in or having access to government processes. Communities of color and other marginalized groups' interests often seen as creating barriers to getting the real work done. A, B	Community engagement processes are mostly one-way public hearings that are held during times of work with no support for authentic engagement, impeding true participation. Public comment processes require interfacing with online platforms and web without any follow-up. People of color are seen as 'service recipients' or 'beneficiaries' but not as 'partners.' A, B	Carries out intentional inclusiveness efforts, recruiting "someone of color" on advisory committees, however recruitment is more tokenizing participation of communities of color. Community engagement processes and 'partnerships' exist on an as-needed basis. Partnerships are defined by 'access to community' for input on decision-making process, but long-term relationship building and community trust processes are non-existent. Partnerships are mainly transactional processes. L	Begins to develop on-going relationships with communities of color. Community engagement processes are seen throughout the organization. The community's role in advocacy is well-understood and respected. Community seen as potential partners in policy creation, but mostly through roles of advocacy and existing nonprofits. May still struggle at times with understanding meaningful involvement, but is committed to working with communities to refine practices. C, L and M	Commits to struggle to advancing racial equity in the wider community, and builds clear lines of accountability to communities of color. Community engagement process is seen as a priority through all the work. Community partnerships become part of the structure for planning and implementation. Processes do not overburden communities. C, M, N	Organization has a strong reputation for addressing racial inequities across multiple areas. Community engagement process is seen as a priority throughout the organization. Effective and coordinated administrative processes make it easy for community partners to interact. Well coordinated data collection and planning strategies exist that incorporate community narrative and experience. O

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Organizational Characteristics:		Institutionalization of racism includes formal policies, practices, teaching, and decision-making that disadvantages people and communities of color and advantages white people and communities at all levels.	Policies exist to diversify the workplace, but in large part they are not used or not in compliance. Resources are not allocated for implementation or there may be an underlying belief that there isn't a need for anything to change.	Policies and practices are in place to promote multiculturalism and diversity, but largely do not wield the intended results. Will celebrate different cultures, but avoid race and racism overtly as topics.	Policies and practices call out race and seek to eliminate racial bias. There is intentional review of existing policies and practices to understand barriers towards achieving racial equity goals. Policies and practices begin to shift so that there is broad ownership of racial equity initiatives.	Institutional barriers that inhibit progress towards racial equity policies and practices are removed and racial equity proactively advanced. No longer uses race-neutral approach for targeted strategies.	Commitment to racial equity is reflected throughout policies and practices and reinforced at all levels of the organization. Addresses structural racism by collaborating and sharing best practices with other agencies and developing and implementing a collective racial equity agenda.
Structures	**Budgeting and contracting**	Budget reinforces the status quo of racial inequity. Racial inequities are not considered in budget decisions. Contractors of color are intentionally excluded. Policies and practices for the awarding of funding intentionally exclude contractors of color. A, B	Budget processes may reference diversity, but no real focus on addressing racial inequities. For contracting and procurement, processes may include a person of color to represent diverse communities, but racial equity in policies and practices is largely avoided. A, B	Diversity and inclusion more clearly integrated into budget decision making processes. Carries out intentional efforts to include diversity and members of impacted communities, particularly communities of color, in contracting and procurement. Contractors do not reflect the demographic diversity of the community. C	Racial Equity Tool or lens begins to be used in budget decision making processes. Consistently uses diverse selection panels, including people of color, for all contracting and procurement processes. Reviews WMBE utilization rates disaggregated racial groups, and develops utilization targets. Creates proactive plans to meet targets, i.e. policy changes and broad relationship building within the community. C, P, R	Racial Equity Tool begins to be consistently used in budget decision making processes, and support is provided to managers and financial analysts using the tool. Integrates racial equity goals as part of contract/grant purpose and requirements. Selection processes include panelists from communities of color. Continue to strengthen P, R	Racial Equity Tool or lens is consistently used in budget decision making processes, and support is provided to managers and financial analysts using the tool. Managers and financial analysts are competent in integrating racial equity into all phases of budgeting. Has a consistent positive track record of utilization rates with WMBE contractors, including contractors of color. Works with other groups and institutions to develop and reinforce effective contracting and procurement processes and policies. Communities of color recognize the institution as being inclusive and representative in its budgeting, contracting and procurement. Continue to strengthen P, R
	Communications	Communications are explicitly or implicity exclusive. A, B	Communications may mention diversity or "all people." A, B	Communications name diversity, inclusion and/or mult-culturalism. Messages can unintentionally perpetuate stereotypes and/or bias. A, B, C	Communications name race, racial equity and people of color. Communications staff are beginning to develop more nuanced understanding of how to communicate about race. C, G	Communications consistently name race and racial equity. Staff involved with developing communications are proactively integrating racial equity messages that help to build commitment, both internally and in the community, for advancing racial equity. C, G, O	Communications consistently name race and racial equity. Staff involved with developing communications are proactively integrating racial equity messages that help to build commitment, both internally and in the community, for advancing racial equity. Staff are working with community partners to develop and implement shared messaging and strategies that advance racial equity. Continue to strengthen C, G, O
	Data Collection and Evaluation	Race data (demographics and outcomes), internally and externally, purposefully discount, remove, or avoid mention of people or communities of color. There is no transparency of data collection and evaluation methods throughout the organization. A, B	Race data, internally and externally, is collected only when there is direction or guidance from somewhere else. There is a strong discomfort from within the organization to ask questions on race so income or zip code are regularly used as proxies when collecting primary data. Transparency of data collection methods and results are still not open to staff. A, B	Race data is collected internally and externally, but inconsistently - both in terms of how it is collected and what racial categories are used. External data is prioritized over internal evaluation of organization. Data is used year-to-year, but not for long-term planning or evaluation towards racial equity goals. Transparency of data collection methods and results are not open to staff. S, T	Race data has consistent methods for primary data collection, internally and externally, and data is tracked over time to identify trends. Internal evaluation processes are present but not robust. Third party data, (i.e. census, ACS) begin to inform organizational, programmatic, and policy strategic goals, but, data is not presented with current and historical context. Transparency of data collection methods and results are open to staff but only leadership actually look at data. S, T, U	Data collection processes have clear goals for racial equity, and are defined for programs, allowing for ongoing data collection and evaluation to tie back to both programmatic and organizational racial equity objectives. Both internal and external data collection and evaluation are robust. Programs and departments work with one another to share data. However, data is not regularly shared with partners and other stakeholders. Transparency of data collection methods and results are open to staff and all levels of staff are beginning to see and understand the data. Continue to strengthen U	Data collection processes have effective systems to collect data on race and are consistently used to inform program and policy design, implementation and evaluation. Data is used to track progress towards racial equity goals. When progress is not being made, data is used to assess shifts in strategies. Both internal and external data collection and evaluation are robust. Systems are user friendly. Public and staff consider data collection to be a positive interaction. Transparency of data collection methods and results are open to staff and community, and both staff and community have an understanding of the data. Continue to strengthen U