



Equity Strategic Action Plan

Equity Strategic Action Plan

Year

Organization Name

Address/Location

Who completed this plan? (Name(s), Title(s))

Version Date



I. FRAMEWORK

A. OUR PROFILE

1. Our Mission

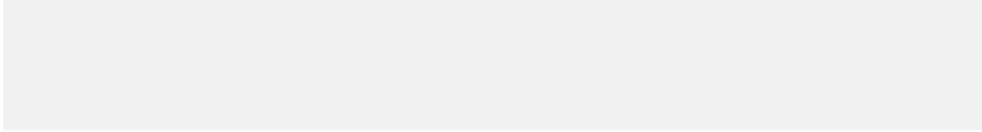
2. Our Vision

3. Our Values

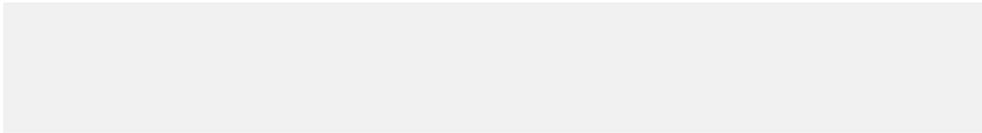
4. Our Equity Statement



5. Our Service Area

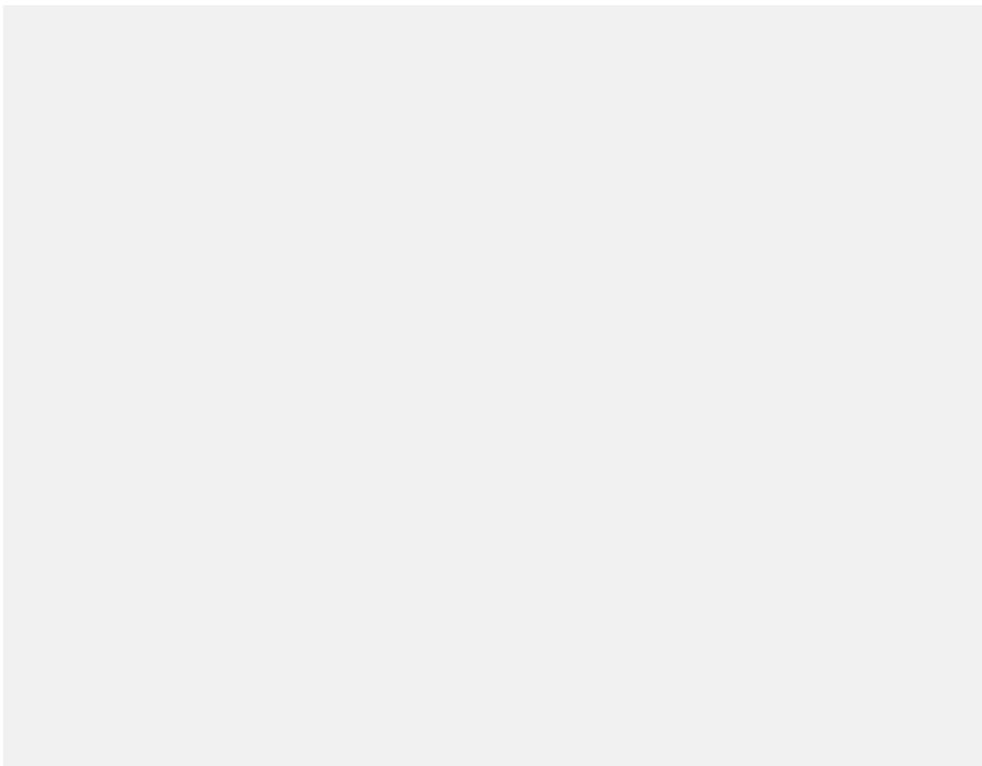


6. Our Annual Revenue



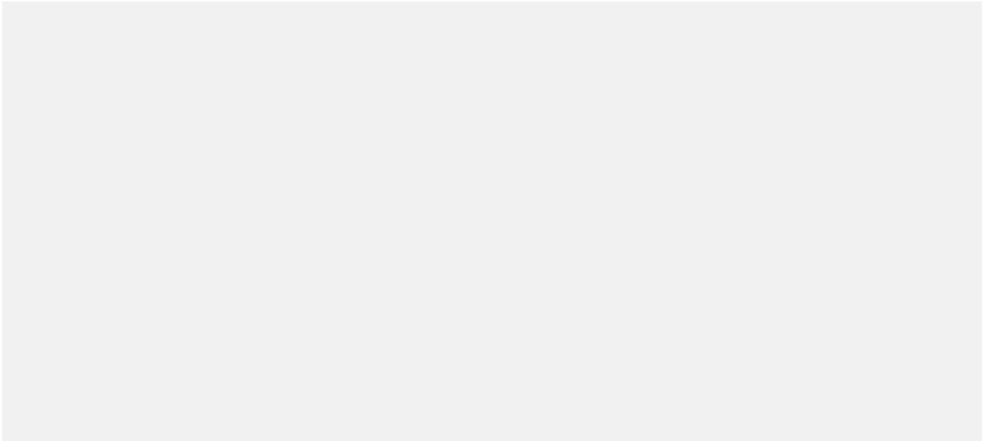
7. Our Customers

Who are the group(s) for which your organization exists? How many of them do you serve annually? How do you segment your customers? How many are members of census-based racial, ethnic, and other categories?



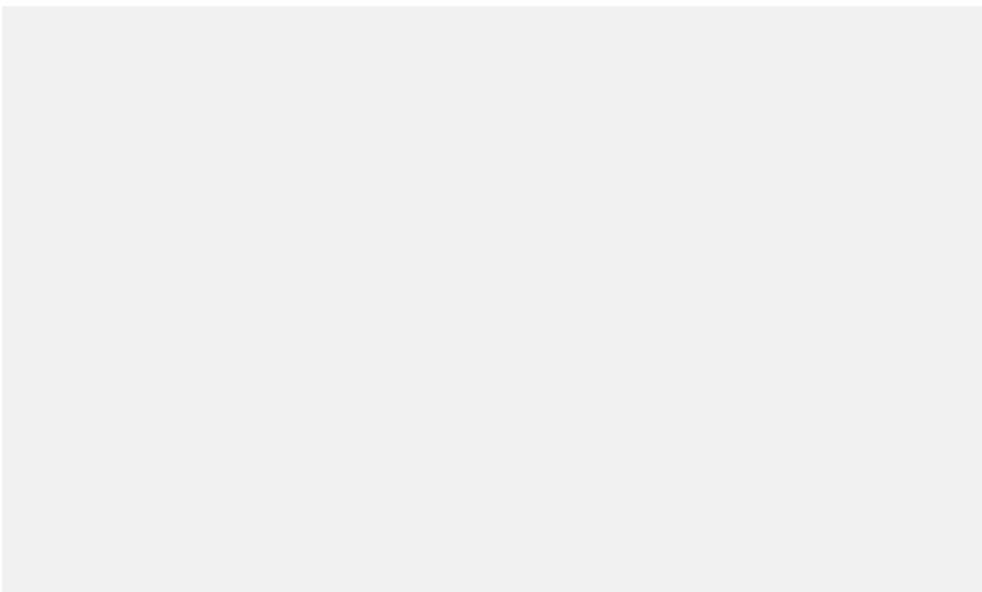
8. Our Other Stakeholders

What other types of groups do you serve, work with, or benefit?



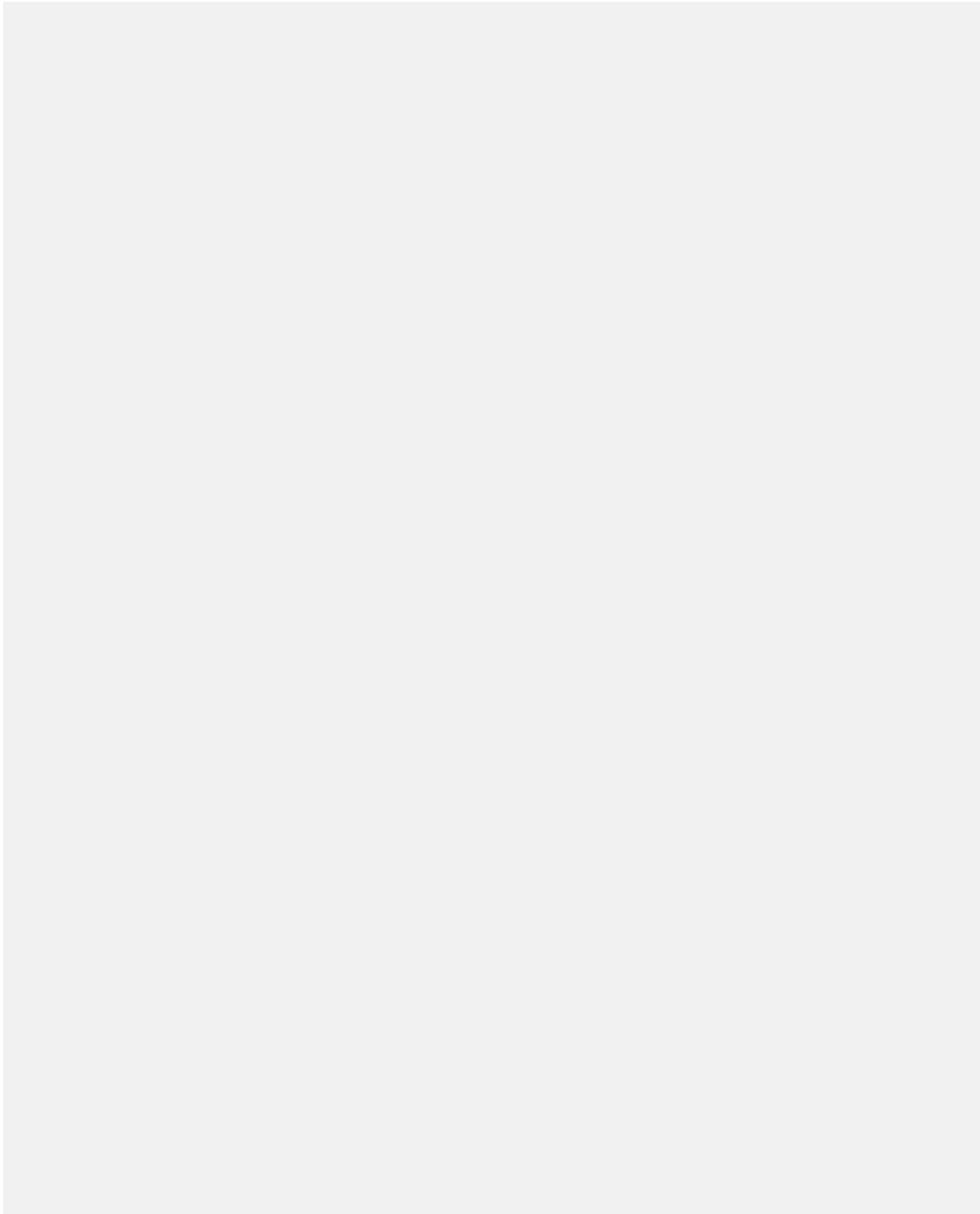
9. Our Workforce

How many staff, independent contractors, volunteers, and interns are typically involved in accomplishing your work? How do you segment your workforce? How many are members of census-based racial, ethnic, and other categories?



B. OUR EQUITY HISTORY

What is the timeline, major activities, and successes, and key challenges your organization has addressed that have led you to the point of creating this Equity Strategic Action Plan?



C. OUR COMMITMENTS

We fully commit to the long-term work of becoming culturally competent, welcoming, and inclusive of all people both within and outside our organization, as well as in the range of issues and challenges that we engage in, including (but not limited to):

What are 5 critical positions or actions your organization promises to take with its customers and key stakeholders in pursuit of its diversity, inclusion, and equity goals?

The form consists of five horizontal grey bars stacked vertically, intended for the user to write their organization's commitments. Each bar is approximately 600 pixels wide and 60 pixels high.

D. OUR OPERATIONAL PRINCIPLES

The following principles must be front and center when executing this plan.

1. Use Disaggregated Data and Information

One of the drivers of disparity is the inability or unwillingness to examine results of policies and activities for segmented racial, ethnic or cultural groups. To achieve equity, therefore, we must collect and analyze quantitative and qualitative information in this way. Collect data segmented (at minimum) by census-based racial and ethnic categories and use that data to create options and make decisions.

2. Make Data-Driven Decisions

Another driver of disparity is the unwillingness to use segmented data to make decisions that ensure parity. Consider racial and ethnic information as we work. Compare results for each group against their presence in our service areas and against results of the other groups. Provide these analyses when making recommendations.

3. Leverage Existing Assets

We have valuable assets at our fingertips: knowledgeable staff, board members, partners, community members, technical experts and professional services, state agencies and more. Tap into these institutional resources at all phases of your work.

4. Use Existing Authority

Senior leaders, supervisors, other staff members and the Board of Directors have individual powers within their jobs and roles. Explore and utilize these authorities as necessary to deliver on this Equity Plan.

5. Make Policy Changes

We have dozens of policies – those with an external focus and those with an internal focus. While delivering on this Equity Plan, uphold or strengthen policies that will deliver strong equity results. Be ready to change policies that create barriers.

6. Use Equity to Balance Decisions

When making decisions, give equity sufficient weight. Use segmented data, historical information, and quality comparisons. Develop a method for considering equity results balanced against financial and other business results, such as a decision matrix¹ or balanced scorecard². This will ensure ALL segments of your customers and workforce get due consideration, and that their interests are respected.



¹ <https://asq.org/quality-resources/decision-matrix>

² <https://asq.org/quality-resources/balanced-scorecard>

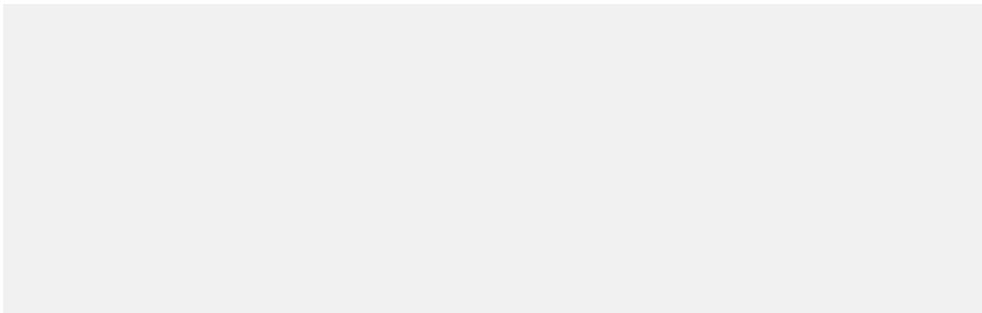
II. ACTION PLAN

A. ESAP PURPOSE

The main purpose of this Equity Strategic Action Plan is to help us measure and significantly improve our results with racially, ethnically, and culturally diverse customers, workforce, and other key stakeholders. Such results include, but are not limited to, improvements in:

- Budgeting and work planning for diversity, inclusion and equity results.
- Staff diversity and cultural competency development.
- Board diversity and cultural competency development.
- Social network diversity and quality improvement.

Other results to improve:



We have chosen two high-impact areas in which to make measurable improvements over the next 12 – 18 months. Over that time, we will know what we are doing to achieve our goals, why we are doing those things, what the results should be, and how well we are doing compared to our own past results and the results of others. We will have processes in place to ensure our resources are sufficient and being appropriately applied to get results. Finally, we will analyze our new results and revise our plan as needed.



B. ESAP DEVELOPMENT

This plan is the next logical step toward operationalizing our commitment to diversity, inclusion, and equity. It is based on data, qualitative information, feedback, and lessons learned on our journey, as well as learning from the efforts of other organizations seeking to improve diversity, inclusion, and equity.

We believe this plan shows careful consideration of high-impact actions, understanding of individual and organizational capacities, a desire to authentically engage people from culturally diverse backgrounds as key assets, and a commitment to getting measurable results from our chosen activities.

C. ESAP POSITION

Diversity and inclusion work are happening in many ways throughout the organization. This plan is not intended to restrict that work, but rather identify our required minimum efforts necessary to achieve key diversity and inclusion goals over the next year. Leaders and managers are welcome to support additional opportunities to deliver equity results as their resources allow, if the enclosed strategic improvements are accomplished on time.



D. AUDIENCES

This plan is written specifically to guide staff and board in:

- Deciding how to allocate organizational resources;
- Supervising others to ensure our plans are executed; and/or
- Supporting our equity work.

The target audience for this plan are senior leaders, supervisors, program managers and special teams. If we fall into these groups, we will refer to this plan as we make decisions about where and how to assign people, money, materials, time, energy, and attention. We will also help hold our direct reports accountable to achieving these equity goals. For general transparency, this plan will be easily accessible to all staff, board, volunteers, vendors, partners, and other key stakeholders so they are knowledgeable about our path forward.



E. ESAP MANAGEMENT

1. Coordination

The Senior Leadership Team is responsible for managing this Equity Strategic Action Plan. They will model desirable behaviors, assure consistent application of this plan and its principles, and manage for equity results. They will also coordinate with special teams and functional units. Their roles are to provide excellent leadership and support to others as they execute the plan.

Responsibilities include:

- Track work plan progress regularly.
- Brief staff, board, and other key stakeholders regularly on work plan progress.
- Coordinate regular meetings with designated individuals and teams who are “on point” for certain activities.
- Collectively make Equity Plan decisions.
- Provide regular internal communications to introduce this Plan to the staff and report its results.
- Identify and address resource gaps in the plan, including working with those ‘on point’ to put forward proposals for additional organizational resources, where needed.
- Track and celebrate accomplishments.

Other responsibilities?

2. Oversight

Our seniormost leader is responsible for ensuring governance and workforce accountability to this Equity Strategic Action Plan.

II. STRATEGIC IMPROVEMENTS

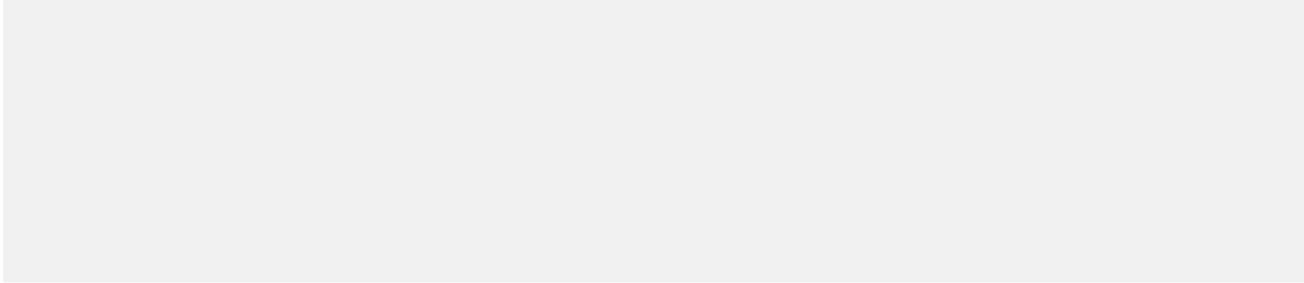
1. Improvement area

What exactly will your organization improve with excellence over the next year?

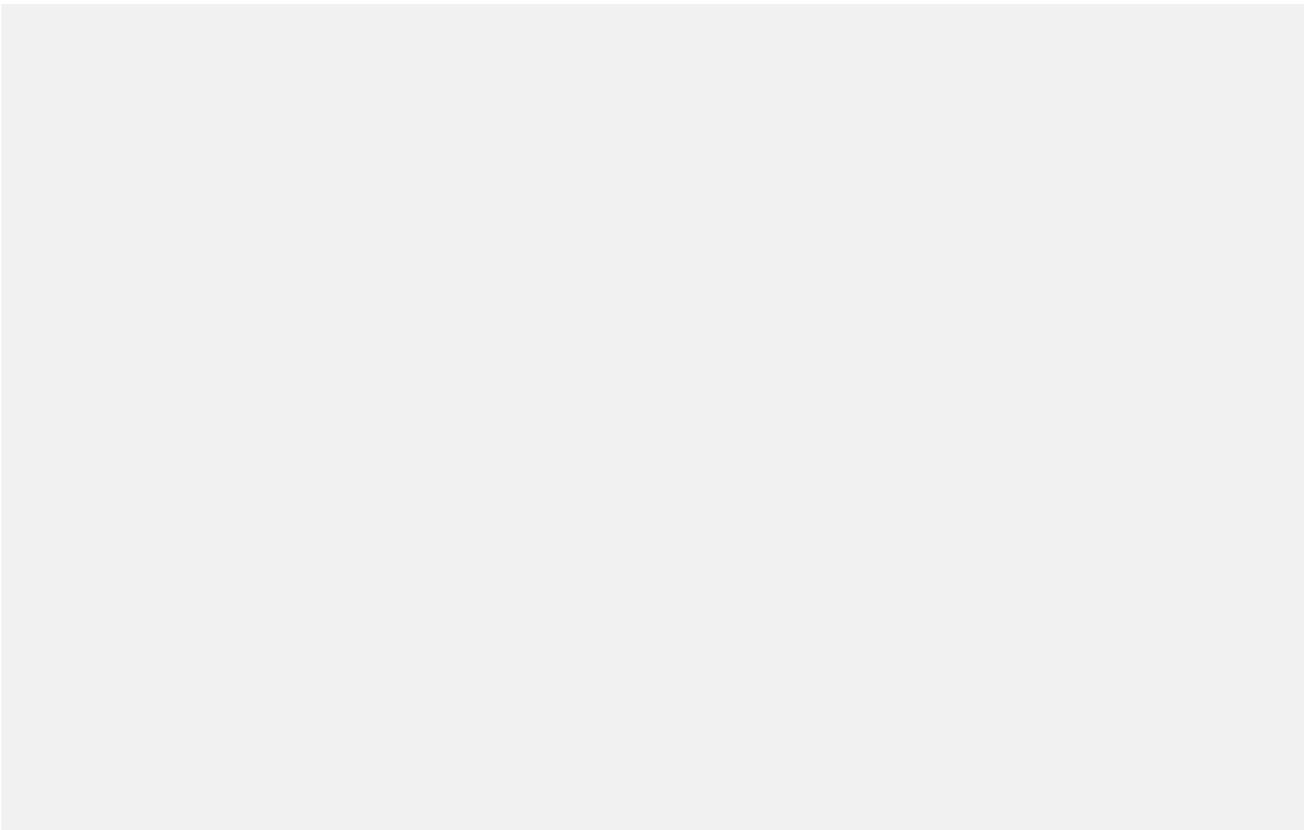
Guidance/Criteria/Definitions related to improvement, What more do the people planning and implementing need to know so they can be more effective?:

What leader will make sure this improvement happens?

What is the SMART³ goal for this strategic improvement over the next year?



Benefits for the organization when this goal is achieved. What organizational mission, vision, values, strategic objectives, revenue goals, etc. will achieving this goal help accomplish? Name at least 5 very specific benefits.



³ Specific, Measurable, Achievable, Relevant, Time-bound

Improvement area: _____

SMART Goal: _____

Phase 1 | PLAN: Measure and Plan

Milestones	Responsible	Deadline	Resources Requested
1.			
2.			
3.			
4.			
5.			
6.			
7.			

Phase 2 | DO: Execute Work Plan(s) and Measure Results

Milestones	Responsible	Deadline	Resources Requested
8. Conduct improvement activities. Get feedback. Follow up on feedback.			
9. Measure, track, and report results.			
10.			

Phase 3 | CHECK: Learn and Improve

11. Evaluate activities, spending and results over past years to identify good practice, benchmarking, and improvement opportunities. Determine what changes are necessary to achieve desired equity results.			
12. Document our learning from the process and activities			
13. Document our learning about the process – was it the best one to use? Is there one that could get us better results?			
14. Share our learning across the organization			

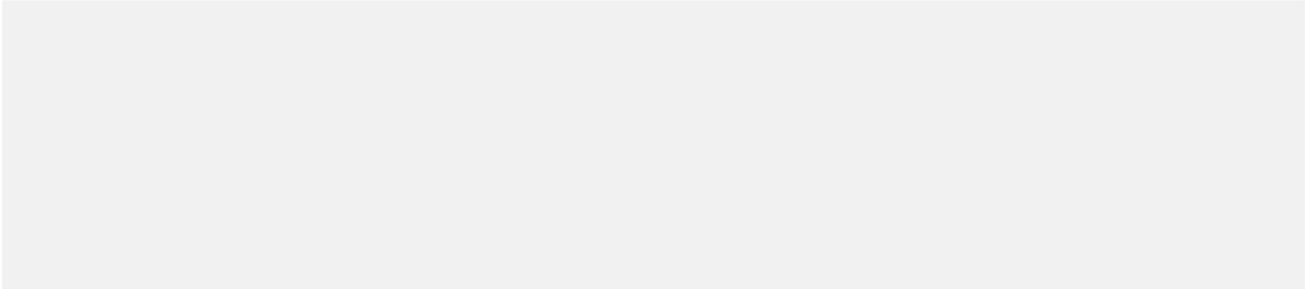
Phase 4 | ACT: Make it a Habit

Milestones	Responsible	Deadline	Resources Requested
15. For what is proven to work over time, Institutionalize the changes we made through formal policy and practice documentation.			
16. Create next year's ESAP.			

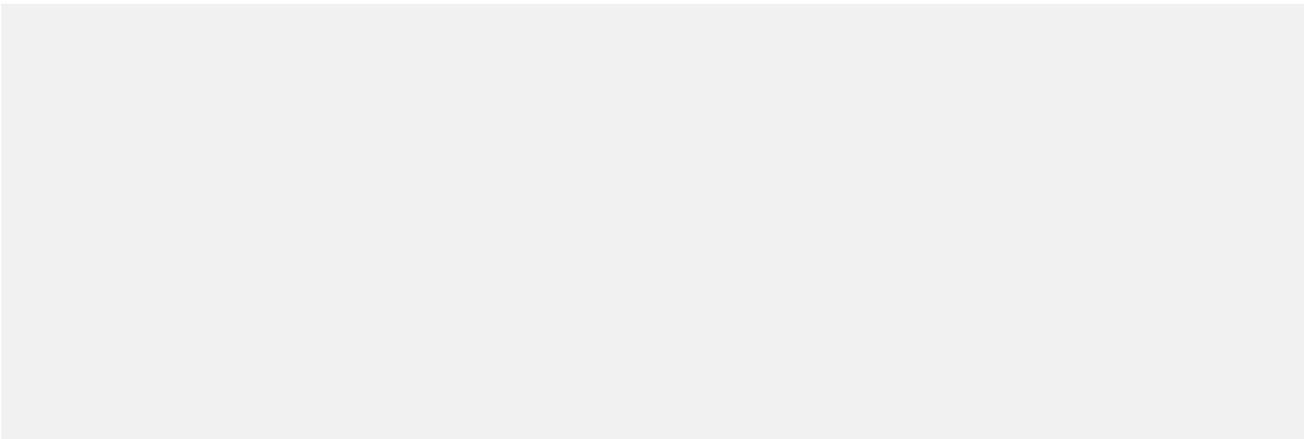


2. Improvement area

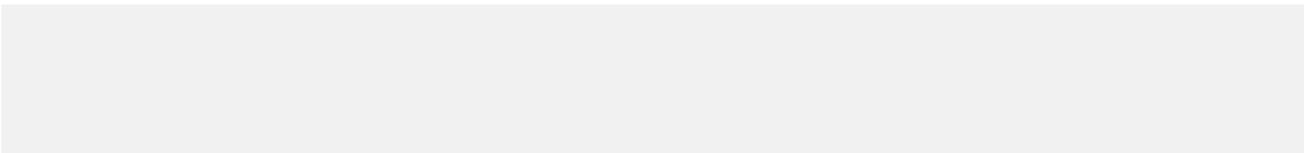
What exactly will your organization improve with excellence over the next year?



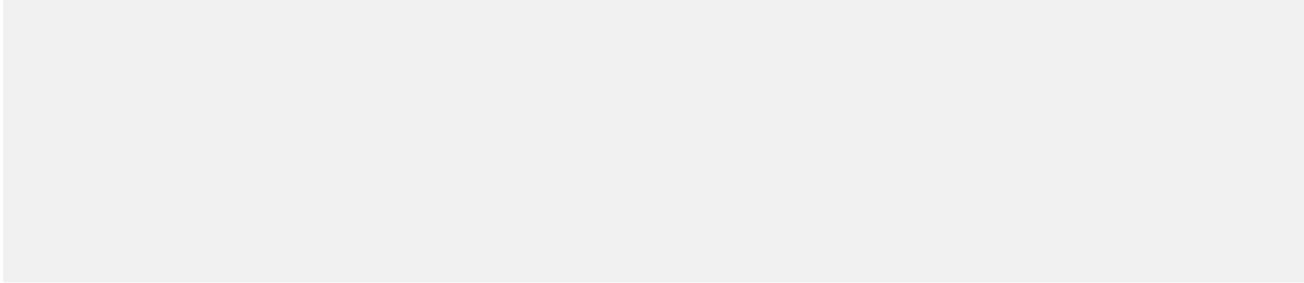
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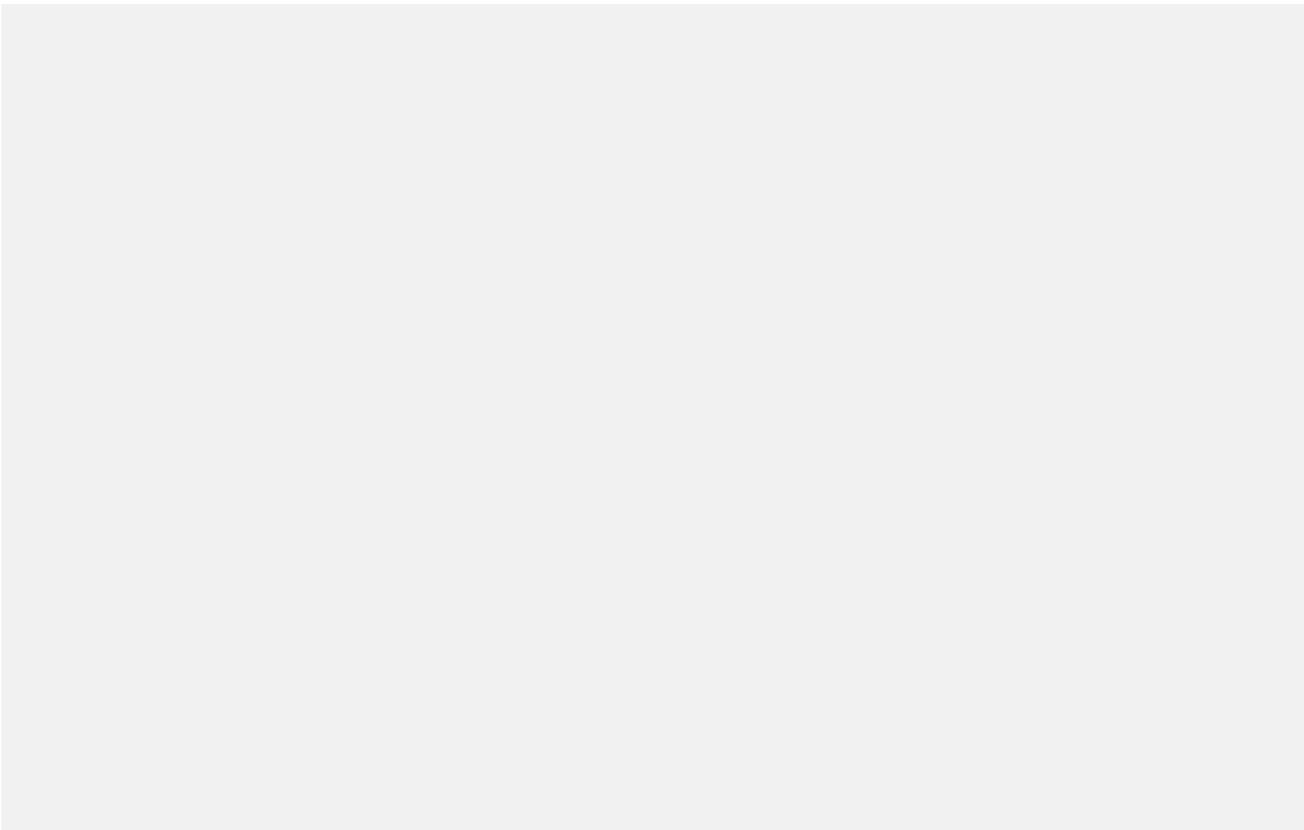
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