

DIVERSITY, EQUITY, AND INCLUSION CONSULTING SERVICES PROPOSAL

HCH's goal is to assist Swampscott, MA in creating a Diversity, Equity and Inclusion (DEI) strategic plan which would provide the organizational assessment's findings and a short and long-term roadmap for making material improvements in the areas of diversity, equity and inclusion, and provide educational resources and trainings guidance for current and future employees.

Prepared by :

Henry C. Hodge, Jr., President
3016 Post Road
Warwick, RI 02886
T: (401) 568-5778 x3701 E: Hodge@HCHent.com

Prepared for :

Business Manager
Swampscott Town Hall
22 Monument Ave
Swampscott, MA 01907



November 13, 2023

Attn: Business Manager
Swampscott Town Hall
22 Monument Ave.
Swampscott, MA 01907

Dear Business Manager:

HCH Enterprises, LLC is pleased to submit our response to the Town of Swampscott's request for professional consulting services to conduct an organizational assessment, provide specialized facilitation, create an employee training plan, and start community and employee education programs in support of the development of a strategic plan that will move the Town forward towards integrating diversity, equity, and inclusion in the workplace and on boards and committees. HCH and our staff have been conducting equity-related work for over 30 years in federal, state, and local government. Our experience in the DEI space includes conducting organizational evaluations; qualitative and quantitative data collection and analysis; creating reports; delivering presentations to a diverse group of stakeholders; and developing strategic plans and recommendations.

HCH uses a unique DEI approach that gets to the heart of what DEI initiatives set out to do: foster a sense of belonging. HCH's strategy includes centering belonging, utilizing industry best practices, focusing on relationships, ensuring stakeholder buy-in, and conducting meaningful community engagement. Our team possesses not only the necessary experience but also a passion for effecting meaningful change.

We are certified by the U.S. Small Business Administration (SBA) as a Small Disadvantaged Business (SDB); the Commonwealth of Massachusetts Unified Certification Program (MassUCP) as a Disadvantaged Business Enterprise (DBE), and the Massachusetts Supplier Diversity Office (SDO) as a Minority Business Enterprises (MBE). For us, these certifications are more than a socio-economic classification; they are evidence of policymakers' commitment to creating a more inclusive and fair society.

We appreciate your consideration of our proposed service offering and eagerly anticipate the town's review of our proposal. The enclosed proposal is valid until the Town selects a firm. Our team is available to address any questions. We welcome the opportunity to engage with the Town of Swampscott's team.

Sincerely,

**Henry C. Hodge**
President & CEO
(401) 568-5778, x3701
(401) 265-4613, cellCc: Doreen Corvese, Associate Director of Capture dcorvese@hchent.com

Plan of Service

Section 2 & 3 – Scope of Services & Deliverables

Comprehensive Institutional Culture Review

The Town of Swampscott's scope of service indicates the requirement of an organizational DEI culture review. HCH specializes in providing this DEI service to local government municipalities. Our comprehensive DEI service includes a broad policy review as well as the development of tailored DEI solutions. HCH works with multiple state and municipal clients to provide both DEI culture reviews and training programs on an ongoing basis.

Our service reflects a top-down DEI policy re-evaluation for the Town of Swampscott. This level of organizational re-evaluation requires extensive research into current policy and work culture but will result in a robust, industry-leading strategy for the future. HCH's DEI strategy stands out as a long term, result based solution because it is built on continuous improvement integration and metrics-based success tracking.

DEI revitalization Strategy in 3 Phases

In Phase 1, our focus is on gaining a comprehensive **understanding** of the current Diversity, Equity, and Inclusion (DEI) climate and goals within the Town. This involves a systematic approach which includes reviewing existing policies, conducting guided workshops for both Town staff and community members, and delving into extensive research on town demographics and the historical context of DEI policy. The aim is to gain valuable insights into how DEI standards are perceived by both the Town Staff and the community at large. By the end of this phase, we aim to have a well-rounded understanding of the existing organizational culture, providing a strong foundation for the subsequent phases of our DEI initiative.

In Phase 2, we leverage our in-depth comprehension of the Town of Swampscott's distinct circumstances and challenges to **design** a Short- and Long-term DEI Strategy. Our DEI recommendations are anchored in current best practices, driven by data, adaptive to evolving needs, offer cost-effective solutions, and are readily actionable within the specific context of the community. This approach ensures that our proposed strategy is not only informed by industry standards but also tailored to address the unique dynamics of Swampscott.

The third and final phase is **implementation**. The implementation stage begins with the delivery of the finalized DEI Strategic Plan, including the Short-Term Plan and The Long-Term Plan. We also provide the Town with the DEI Training solutions that we have developed. The implementation phase includes a year of training program facilitation and coordination.

Understanding Swampscott Culture

The first step of phase one is understanding the Town's DEI goals. We will meet with Town officials to gain a thorough understanding of DEI goals. With this understanding in place, we will begin a review of the Town's current policies starting with an examination of the current policies. We keep a keen focus on identifying any barriers that prevent the workforce from mirroring the demographic composition of the Town. Our team will collaborate closely with key stakeholders and department heads to gain their policy insights. At this time, we will request key Town documents for review to enable our team to understand the current organizational culture, including information related to:

- Equal Employment Opportunity (EEO) Policy
- Anti-Discrimination and Harassment Policy
- Diversity, Equity, and Inclusion (DEI) Statement or Mission Statement
- Recruitment and Hiring Policies
- Employee Training and Development Programs
- Promotion and Advancement Policies
- Retention and Inclusivity Initiatives
- Accessibility and Accommodations Policies

- Complaints and Grievance Procedures
- Community Engagement and Outreach Efforts

What we learn from this thorough review of Town policies will be compiled in a strengths, weaknesses, opportunities, and threats (SWOT) framework in our reporting for clarity.

The information provided by the Town is just one aspect of our broader research initiative. To gain a comprehensive understanding of current organizational culture, HCH will conduct thorough research on both internal and external assessments of DEI policy. This will involve reviewing town hall meeting minutes and community outreach results.

We will be working with Dr. Maritsa Barros, who is the inaugural full-time Lecturer in the Diversity, Equity, Inclusion, and Justice Leadership Program at Tufts University. We will ask for her insights into the successes and shortcomings of prior initiatives. Additionally, we will ask for her guidance in identifying community leaders who can contribute to the current initiative.

If essential performance metrics are not available, HCH will actively pursue them from alternative sources or utilize existing historical data to generate them. We will identify any obstacles and provide recommendations for future best practices.

In addition to this research, we will look for case studies of comparable towns which are similar in size and demographic profile to the Town of Swampscott. Case studies are an invaluable source that is widely used to guide result driven policy making. HCH conducts case study research near the end of the research phase when we have the best understanding of the unique characteristic of our client's communities to ensure that the case studies, we refer to are valid comparisons.

Assessment of Demographic Representation, Procurement Process, and DEI Empowerment

Demographic Representation

In addition to the information provided by the town, HCH will perform an analysis of the current demographic state of the Town's workforce including age, gender, and protected classes, including minority status. If we determine there is disproportional representation to year-round residents, we will look to identify specific determinants such as housing access. We will research case studies of towns with similar size and demographic who overcame these inequities, and the strategies that they employed. With the key information identified, it will inform our conversation with the community and town staff. We will present the solutions proven to work in other communities for input. Additionally, we will crowdsource solutions and invite the public and staff to suggest solutions they believe the Town of Swampscott should be considering.

The information gathered including a demographic report, relevant case studies, relevant survey response, and community feedback will be clearly presented to the Town in the workforce assessment. This document will then be used to inform the DEI Strategic Plan.

Procurement

To assess equity into the Town's procurement process, a focused review will be conducted with an emphasis on the bidding and contract award stages. This assessment will identify specific areas where equity considerations can be integrated effectively. Recommendations will then be formulated, drawing on established DEI principles, to enhance fairness and inclusivity in the selection and awarding of contracts. This plan will involve assembling a task force of procurement experts and DEI advisors to conduct the review and develop targeted recommendations for implementation, aligning the procurement process with the broader DEI goals of the Town's organizational reinvention.

DEI Empowerment

To assess the Town's capacity to implement programs focused on empowering minorities in the Town of Swampscott workforce a comprehensive approach will be employed. This evaluation includes several key components. First, we conduct an in-depth analysis of existing training infrastructure, resources, and practices,

with a focus on inclusivity and accessibility for all demographics. Second, interviews and surveys will be administered to both employees and community members to gather insights on their experiences, perspectives, and suggestions regarding training and advancement opportunities. Third, a comparative analysis will be performed to benchmark the Town's practices against industry-leading standards and best practices in DEI initiatives. This holistic assessment will culminate in a detailed report outlining strengths, weaknesses, and recommended strategies to enhance diversity, equity, and inclusion efforts within the Town's organizational framework. The recommendations will be tailored to align with the Town's overarching goal of fostering an inclusive and equitable environment.

Staff Workshop Plan

Alongside our review of policy, we will engage staff in facilitated workshops to determine their perception of DEI policy. Workshops will be hosted by HCH's experienced DEI staff. At the outset, our priority is to establish a solid foundation by offering precise definitions of diversity, equity, and inclusion. This practice is woven consistently throughout our sessions, ensuring that participants are equipped with the most appropriate and relevant language choices for each topic. By establishing this common language, we lay the essential groundwork for open and effective communication, promoting an environment of mutual respect and understanding. This, in turn, enables meaningful progress in our DEI training sessions.

We will develop customized workshop plans and agendas for town staff, the public, town leadership roles, and elected officials. HCH recommends a hybrid learning approach to staff workshops. We will recognize that each format brings distinctive benefits that are suited to different learning styles and scheduling requirements.

We will host at least 10 organizational staff workshops. We will work with town staff to ensure these workshops are inclusive of all key stakeholders and representative of all staff and community perspectives.

HCH will work with the Town of Swampscott to achieve greater than 75% staff participation in workshops or via survey. We would like to host workshops with as many town staff as possible to ensure the diverse perspectives within the organization are fully represented. Participation is proven to correlate to DEI program success, ideally, we would reach everyone within the organization. In order to improve participation rates, we will develop a survey and distribute it to town staff.

HCH takes a data driven approach to DEI. To affirm the alignment with the Town staff's goals for these sessions, we provide surveys at the end of every workshop. We ask respondents to rate our service as facilitator and organizer of the session to confirm we are meeting staff expectations, or the steps needed to change. Additionally, the survey will ask staff to indicate how well they believe the Town of Swampscott is accomplishing DEI goals. This section of the survey will be quantifiably analyzed to determine trends and patterns.

Community Outreach Workshops

HCH will host at least 2 community outreach workshops with the understanding that the town of Swampscott has indicated 3 at one point in the RFP. We recommend in-person facilitation for all community outreaches.

Our community outreach workshops are designed to determine the public's perception of current DEI policy implementation in the Town of Swampscott. These in person workshops will feature guided public commentary with live streamed accessibility. Workshops will begin with a review of DEI terms to establish common language and set the groundwork for respectful discourse.

Our experienced public speaker and DEI facilitator will lead conversation to various DEI goals to systematically review with the community what they feel the Town of Swampscott is doing well and what could be improved.

Public commentary is expected to yield real and perceived inequities in current DEI policy that can be addressed in future DEI policies. HCH will create a flexible workshop agenda to ensure that everyone has an opportunity to voice their opinions. These outreach meetings will also provide an opportunity to distribute surveys for

quantifiable data alongside the perspectives voiced. Written commentary cards will additionally be available to ensure diversity of perspective.

Community Survey

HCH possesses a distinctive advantage in conducting an expansive community survey due to our establishment of an in-house call center. This facility, located at our headquarters in Warwick, RI. However, for the specific purpose of this survey, we propose telephone polling of Town residents, enabling us to gain invaluable insights into the community's perspective on the current DEI policies in the Town.

Furthermore, we offer flexibility in survey administration, we can present several survey options for the town's consideration utilizing HCH's extensive professional and call center resources. The actual strategy will be finalized in consultation with the town and community leaders. As a first option, we can conduct polling on two separate occasions, maximizing outreach and response potential. Alternatively, we can adopt a hybrid approach, integrating digital or paper-based surveys to accommodate diverse preferences. Additionally, as part of our comprehensive approach, we will furnish surveys to participants of community outreach workshops, ensuring a holistic and inclusive data gathering process. This multi-pronged strategy demonstrates our commitment to obtaining a thorough and representative understanding of the community's sentiments towards DEI initiatives in the Town of Swampscott.

Phase 2- Design

The design stage begins once stage one is complete and there is sufficient data to craft a successful DEI Strategy Plan. To begin we aggregate data including:

- Policy review
- Independent research
- Demographic Assessment
- Procurement Assessment
- DEI Empowerment Assessment
- 2+ Public Survey Results
- Town Survey Results
- 2+ Community outreach workshop
- 10+ Town of Swampscott Workforce Workshops

Analysis of Organizational Culture via Database

This quantity of data is most easily understood as part of an anonymous database marked with sortable metadata. Using these survey result databases, we start to look for trends in the information we have gathered. This is best explained through an example.

Let's focus on the Human Resources department as an example. Through our database analysis, we might discover that when it comes to diversity training, there is a higher level of engagement and positive feedback from the entry-level employees compared to the management team. This indicates an opportunity for targeted intervention. Further investigation could reveal that management may benefit from specialized training modules that address leadership's role in fostering inclusivity and diversity within the workplace. This insight allows us to tailor our recommendations, ensuring that our strategies promote a more inclusive environment for all levels of the organization.

Using our large dataset, we are able to look at organizational departments through a multitude of lenses.

- Public perception of DEI policy in Swampscott compared to Workforce perceptions.
- Department specific DEI strengths and weaknesses
- Minority perceptions compared to majority perception.
- Perceptions of DEI policy in the unionized workforce

- Perceptions of DEI policy for women in leadership roles in the Town of Swampscott

As you can imagine, this technique is a very powerful tool to identify discrepancies in DEI within the organization and for the people historically most affected. The sortable database and the key takeaways learned through this process will be contained as an addendum to the Strategic Plan.

Short Term Plan

The report detailing short-term goals for the Town of Swampscott will be crafted with a focused approach on three key elements: priority, metrics for success, and cost-effective impact.

First and foremost, priority-setting involves a meticulous evaluation of the most pressing DEI needs within the Town. We will identify areas where immediate attention and intervention are crucial. By prioritizing any area where a current DEI policy is a potential problem, we seek to establish DEI policies that shield the Town of Swampscott from immediate DEI liability.

Once immediate problems are resolved we prioritize widely popular policy change. Implementing these policies will build goodwill for the Town and support for the DEI initiative.

A critical aspect of our approach is to ensure a cost-effective impact. This entails a thoughtful allocation of resources to maximize the effectiveness of our DEI initiatives while being mindful of budgetary constraints. By strategically managing resources and leveraging existing assets, our aim is to achieve meaningful results in a manner that is both efficient and financially responsible. For instance, with nearly 5% of the town identifying as fully or partially Hispanic, we have previously recommended expanding access to language services and materials. This approach not only builds goodwill within these communities but also represents an inexpensive yet impactful strategy towards inclusivity.

Lastly, we will identify programmatic inclusivity goals. We congratulate the Town on achieving the most diverse hiring period in the last hundred years over the last 18 months. HCH understands that the town has identified a critical shortcoming in their inclusivity policy of connecting with minority job candidates. HCH is a minority owned company that specializes in providing minority recruitment and retainment consultation. We have provided this consultation to many local municipalities, including St. Johnsbury, Vt. The inclusivity approach we provide has a proven track record for our clients that is backed up by measurable success.

To empower the Town in tracking the success of their inclusivity policies, HCH will provide a comprehensive tracking and reporting system. This system will utilize key performance indicators (KPIs) tailored to the Town's specific goals and objectives. Regular progress reports and assessments will be generated, providing transparent and actionable insights. Through this approach, the Town will have a clear and measurable framework to monitor the effectiveness of their inclusivity initiatives and make informed adjustments as needed. Additionally, HCH will offer guidance on how to interpret and leverage this data to continually refine and enhance their efforts in connecting with and retaining minority job candidates. This continuous improvement approach ensures that the Town is equipped with the necessary tools to drive sustained progress.

In summary, the short-term plan for 6-12 months will be grounded in a systematic approach that prioritizes areas of focus, establishes clear metrics for success, and seeks to achieve a cost-effective impact. This structured framework will guide our efforts in driving positive change and advancing diversity, equity, and inclusion within the Town of Swampscott.

Education and Training

In the Short- Term Plan section HCH will deliver a comprehensive DEI Training Plan/Manual. This course will be designed to bridge any identified training gaps within the Town. Our approach places a strong emphasis on accessibility and usability so that all employees can engage with the material effectively. Accordingly, of critical importance of building a common language and shared knowledge about DEI. Just like staff workshops, our course will feature a glossary of DEI terms, with definitions, common usages, and frequently asked questions. This is one of many ways our training plan emphasizes best practices that cultivate a welcoming and inclusive

environment. By prominently featuring this language we set the tone early that our meeting sessions will be safe places to share occasionally difficult concepts.

Understanding implicit bias is a cornerstone of our program, with dynamic courses that employ interactive exercises, case studies, and self-reflective activities. Additionally, we delve into recognizing structural inequalities, providing in-depth sessions that illuminate systemic barriers and their implications within the organization. With the flexibility to tailor courses to the Town's specific needs, and offer multiple learning environments, HCH stands ready to facilitate a transformative DEI training experience for the Town.

In addition to the training program developed for current staff, we will create a dedicated handbook and instructions for new staff that will seamlessly integrate their DEI education as part of the onboarding process.

Institutionalized DEI Presence

Our comprehensive plan will include strategies that ensure that DEI is not simply a refresher course taken once a year. DEI is a commitment of all staff and elected officials every day. We will make specific recommendations that apply to elected and appointed officials including onboarding strategies that apply to specific roles to provide targeted DEI education. Additional recommendations will include strategies to promote DEI awareness within department office spaces.

Long Term Plan

Unlike the short-term goal plan which focuses on immediate intervention actions and high value policy implementation, the long-term plan focuses on establishing systems to monitor and track the Town's inclusivity progress.

HCH will craft a comprehensive goal plan that embodies a strategic and systematic approach to advancing Diversity, Equity, and Inclusion (DEI) within the Town of Swampscott. This plan will begin with a thorough assessment of the current DEI landscape, encompassing a review of existing policies and gathering feedback from stakeholders. Specific, measurable, achievable, relevant, and time-bound (SMART) goals will be established to target areas of improvement, such as inclusive hiring practices, diverse leadership representation, and inclusive workplace policies.

We will identify for the Town key performance indicators (KPIs), to be tracked and their specific meaning in relation to Town operation, inclusivity and DEI program success. These indicators will serve as measurable benchmarks, providing clear insights into the progress and effectiveness of the initiatives. Each KPI will be specifically chosen to align with the Town's unique objectives, allowing for accurate tracking and meaningful assessment of outcomes. This data-driven approach ensures that the Town has a clear and quantifiable means of measuring the impact of its efforts towards inclusivity and DEI program success.

HCH will recommend scheduling and administration best practices for customized DEI training programs we develop. By providing guidance for the year following our training we ensure a smooth program transition. The plan will emphasize the importance of regular reviews and adjustments to ensure alignment with the Town's evolving organizational needs. We will give specific guidance on conducting thorough reviews, including ongoing data collection and analysis. We provide clear strategies for the town to independently monitor their program, facilitating ongoing success and making informed adjustments. This ensures a continuous process of refinement and enhancement over time.

This comprehensive goal plan acts as a dynamic roadmap, guiding the Town towards a future that is not only more inclusive, but also more diverse and equitable. By proactively adapting to new insights and shifts within the organization, we aim to maximize the impact of our DEI efforts. This ensures that every member of the community feels heard, valued, and included, fostering a stronger, more harmonious Town for all.

Provide Comprehensive Advice for the Creation of a DEI Program

HCH will provide comprehensive guidance and expertise in implementing the creation of a dedicated Diversity, Equity, and Inclusion (DEI) staff position within the Town's organizational structure. This will encompass crafting

a detailed job description, outlining the specific functions and responsibilities of the role, recommending an appropriate salary range, and strategically placing this position within the organizational chart. Furthermore, HCH will offer recommendations on how this DEI position can effectively collaborate and interface with various Town departments, boards, community organizations, and the wider community to foster a culture of inclusivity and equity.

Additionally, HCH will provide guidance on the potential establishment of a relevant DEI board or similar group. This advice will give reasons why the Town may wish to establish such a board, and the potential benefits. We will recommend effective operational structure, mission statements, and interface pathways for DEI boards. Lastly, HCH will equip Town department heads with professional assessment tools, resources, and training. This will encompass conducting quantitative analysis, drafting necessary departmental documents, and assisting in the submission of AAP/EEO statistical reports. HCH's aim is to not only meet the immediate needs outlined but also to provide ongoing support and resources to help Swampscott become a leader in DEI practices.

Phase 3- Implementation

The final stage of HCH's comprehensive DEI service is implementation. This implementation phase begins with the presentation of the last deliverable reports, The Strategy Plan, The Short-Term Plan, and the Long-Term Plan. During this phase, HCH will remain engaged with the Town of Swampscott in an advisory position as well as the sole coordinator and facilitator of DEI training implementation.

HCH DEI staff will aid education efforts with a multi-formatted approach that caters to the unique needs and availability of town departments, leadership staff, and elected officials. We will follow the roadmap collaboratively developed during the design phase and presented in the Short-Term Plan to ensure formatting and scheduling consistent with the unique requirements of the various groups within the Town.

During this year-long engagement, HCH will maintain monthly contact with the Director of HR for the Town. Included in this monthly update are the DEI training schedules, session notes, session feedback results, and any other relevant project developments.

Timeline

Below is our proposed project schedule. A final schedule will be submitted for approval.

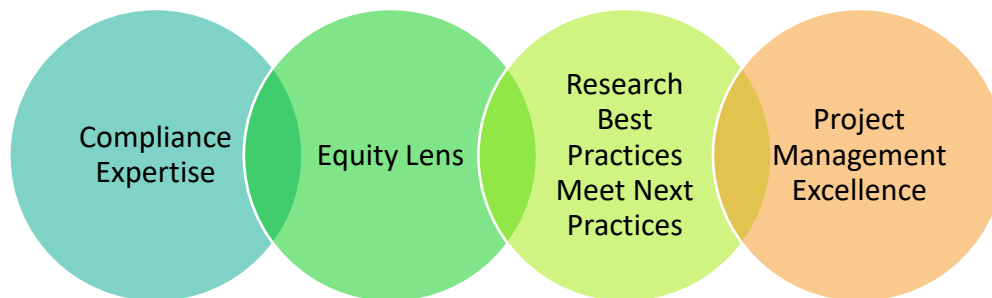
Project Initiation		
Description	HCH and Town of Swampscott onboarding meeting and set communication plan. HCH and Swampscott develop a detailed project plan, including timelines, objectives, and resource allocation.	
Review		February 1, 2024
Review of Current Policy		
Approach	Review of all existing Town of Swampscott DEI policy including policy regarding hiring, training, promotion, retention, and grievance resolution. Review of current Key Points of Interest (KPI) data. Establish contact with Dr. Barros regarding previous initiatives. Developments of Strengths, Opportunities, Threats, Weakness matrix.	
Review		February 2024
Review of Demographic Representation, Procurement, and DEI Empowerment		
Approach	Review and produce assessments on DEI alignment of current Town practices related to hiring, communication, culture, and professional development. Produce an assessment	

	on current demographic representation in comparison to the community. Produce an assessment of current procurement procedure.	
Review		February 2024
Community Outreach Workshops		
Approach	HCH will host at least 2 community outreach workshops to determine the public's perception of current DEI policy implementation in the Town of Swampscott. These in person workshops will feature HCH facilitator guided public commentary with live streamed accessibility.	
Facilitation		March – May 2024
Community Survey		
Approach	Surveys distributed within the town's 15,000 residents via community outreach meetings, telephones polling, electronic surveying, or mail surveying as agreed upon with the Town.	
Survey		March – May 2024
Strategy Design		
Approach	Development of all written deliverables for the Town of Swampscott including survey data quantitative analysis results, the short-term plan, DEI training plan, DEI institutionalization recommendations, long- term plan, and comprehensive plan for DEI staff and board integration	
Design		May – June 2024
Report Delivery		
Description	Delivery of all written reports. All documents produced by HCH are presented to the Town of Swampscott including the reference data gathered associated with all reports.	
Delivery		June 2024
Facilitate Developed DEI Program		
Approach	1 year of facilitation of DEI training updates for staff to implement the updated DEI training programs that we developed specifically for the Town of Swampscott. Ongoing co-ordination with the Director of HR throughout the engagement with program updates.	
Facilitation		6/30/2024 - 6/30/2025

Experience and Resources

i. Describe Firm & Capabilities

Our team is composed of highly qualified consultants with considerable experience in change management and adaptive leadership. We have a proven history of successfully leading organizational change within government organizations and agencies, municipalities, and institutes of higher education, with a deep understanding of the complexities and nuances of change. We have experience working with organizations to embed Diversity, Equity, and Inclusion (DEI) in their culture, strategy, and operations. Our team is committed to providing our clients with the highest level of service and support, helping them navigate the change process and achieve their desired outcomes.



We believe that what sets us apart from other firms the Town will receive proposals from is our compliance expertise, equity lens, research best practices, and project management excellence. We have experience providing compliance to local, county, and state governments. Additionally, we center equity in all our work. Having a firm with diversity, equity, inclusion, and belonging experience will be beneficial to the Town. Part of that equity lens means that we really do a deep dive to understand the specific needs of the communities we work in. With HCH, the Town can rest assured knowing that our data collection, analysis, and reports are customized to address Swampscott's needs. HCH is constantly researching best practices and collaborates with the leaders that are developing those best practices. Finally, our 30 years of providing project management excellence ensure a timely delivery of services, at or below cost, and meets the expectations of the Town.

We believe that HCH's compliance advisor and project manager team are a perfect fit for this project. We include biographies below with resumes in **Appendix A**. The project team will have access to internal subject matter experts in areas such as employment law, human resource management, and data analytics.

ii. Key Personnel

Maritsa Barros, EdD, MS, Assessment Leader

Dr. Maritsa Barros is the inaugural full-time Lecturer in the Diversity, Equity, Inclusion, and Justice Leadership Program at Tufts University. She has an educational background in psychology, counseling, African & African American history, and she received a Doctor of Education from Northeastern University with a focus on organizational leadership and her scholarship focused on the lived experiences of Chief Diversity Officers at PWIs in the Northeast. She is an active scholar practitioner serving as a consultant for DEI, an author of an eBook on How to Thrive on a PWI: 8 Key Factors, and is the Chief Operating Officer for Senavision, a family-owned multi-media production company.

She earned her Doctor of Education from Northeastern University, specializing in organizational leadership. Her scholarly work focused on the lived experiences of Chief Diversity Officers in the Northeast, shedding light on critical perspectives in the DEI field. Maritsa held key leadership positions, demonstrating her expertise in driving organizational transformation. As the Chief Officer of Talent and Culture for the City of Revere, she championed initiatives that promoted diversity, equity, and inclusion. Additionally, as the inaugural Chief

Diversity, Equity, and Inclusion Officer for the City of Framingham, she spearheaded efforts to foster a welcoming and equitable community. Maritsa's impact extends to the realm of education. Her tenure at Lesley University highlights her dedication to diversity and student success. In roles such as Associate Diversity Officer and Executive Director of the Urban Scholars Initiative, she pioneered programs that empowered students from underrepresented backgrounds. She also served as the Interim Chief Diversity Officer during the challenging times of the pandemic, providing critical leadership and support.

Robert Zarnetske, JD, EdM, MA, Lead Compliance Manager

Robert Zarnetske, JD, EdM, MA will serve in the role of Lead Compliance and Policy Advisor. He will lead planning and tactical discussions with the town, acting as the subject matter expert on intergovernmental processes and planning. By strategically guiding project activities, he will ensure that the provided services align with the identified goals. He will maintain an open-door policy with our team members, anticipating hurdles and troubleshooting areas of concern, should they occur.

Relevant Experience and Education

Mr. Zarnetske has worked at the municipal, State, and Federal levels of government for over 25 years, with notable roles as the appointed New England Regional Administrator for the U.S. General Services Administration (GSA) and the Acting Assistant Director of the Bureau of Transportation Statistics at the U.S. Department of Transportation. As an adjunct faculty member, Mr. Zarnetske currently teaches Human Resource Management for Public Administration in the UMASS Boston Master of Public Administration program.

Mr. Zarnetske has managed EEO and Affirmative Action Plans for municipalities in Connecticut and Rhode Island. As a private attorney, Mr. Zarnetske represented both employees (including civil servants) and employers in employment litigation.

Mr. Zarnetske has managed recruitment, retention, compliance, training, and employee engagement programs for the City of Norwich (CT) and the Town of South Kingstown (RI). As Regional Administrator, he also provided direct oversight of engagement, diversity and special emphasis programs at the U.S. General Services Administration's New England regional office in Boston.

Nicole Paliotti, MBA, MHA, Project Manager

Nicole Paliotti is a Senior Project Manager for HCH with a focus on public health and public sector project management including research, development, execution, and final deliverables. She has over 25 years' experience in program development and management, customer service, business development, marketing, process improvement, grant management and project management. She worked with RI OHCD, RIDOH's Health Equity Zone team, multiple community partners, and across state agencies during the pandemic to stand up the Quarantine and Isolation facility at the Hallworth House in partnership with West Best Community Action and the Episcopal diocese of Providence which served as Covid overflow housing for our state's homeless shelters.

Miosotis Ramirez, Project Coordinator

Miosotis has over 15 years of project planning, research, and coordination experience. Since joining HCH, she has worked on various projects for the RI Department of Health. Miosotis is skilled in compliance & quality control, evaluation/reporting as well as operations/logistical coordination. In all her engagements, she has built and maintained relationships with community partners, healthcare providers, municipalities, and other stakeholders. She builds strong and lasting business relationships that drive customer satisfaction, improve bottom-line and continuously enhance services. Ms. Ramirez's most recent experience includes Clinical Operation Manager within the High-Density Community workstream of the RI COVID response. Her role is acting as a liaison between RI Department of Health (RI DOH) and community partners, conducting outreach, and helping onsite in any capacity needed. Miosotis is also fluent in Spanish and is integrated into Rhode Island's Latinx community.

Chelsea Levesque, Director of Marketing

Chelsea is responsible for strategic marketing and communications. She oversees the creation and implementation of content across digital channels. She partners with the marketing team to rebrand and

manage the website, ensuring it delivers current, mission-aligned content. Additionally, Chelsea collaborates with departments to produce and distribute communications as needed and serves as HCH media liaison.

iii. Three Examples of DEI assessments and Plans HCH have developed. Three Examples of Education &/or Trainings HCH has provided on DEI Topics.

Below are Samples from both HCH and Dr. Maritsa Barros. The first sample is from St. Johnsbury, VT's Recruitment and Retention Study. The second sample is from the City of Philadelphia Planning Commission's DEIB Report. The third sample is from a training for fire fighters in Newport, RI.

Dr. Barros also contributed two samples from her personal training and assessments. She has provided a Resource Guide and a Toolkit. Please see below for samples.



Recruitment and Retention for Law Enforcement

HCH Enterprises offers a comprehensive Recruitment and Retention Plan for law enforcement that prioritizes inclusion and innovation. Our plan is designed to help municipalities attract, retain, and develop top talent in law enforcement by implementing innovative strategies that foster diversity, equity, and inclusion. Our approach is tailored to the unique needs of each agency and includes customized solutions such as personalized candidate guidance, robust mentorship programs, effective communication strategies, and modern recruiting techniques. With a proven track record of success, we can help law enforcement agencies build a more diverse, inclusive, and talented workforce while meeting their recruitment and retention goals.

Introduction

Law enforcement is critical in maintaining public safety, yet many municipalities struggle to attract and retain a diverse and inclusive workforce. Our firm's Recruitment and Retention Plan offers a tailored solution to this issue by conducting thorough research and analysis. Law enforcement recruitment and retention face various obstacles nationwide, including retirement-eligible officers leaving in large numbers, a lack of interest in law enforcement careers, outdated policies, work-life balance issues, and changing public attitudes toward law enforcement. To overcome these challenges, law enforcement agencies require a modernized recruitment strategy, clear career advancement opportunities, updated policies, work-life balance initiatives, and effective DEI marketing strategies. By implementing these measures, agencies can attract highly qualified and diverse candidates, retain current officers, improve public perceptions, and generate greater interest in law enforcement careers.

Recruitment Strategies

Our recruitment strategy involves a multi-pronged approach that includes the following tactics:

- **Thoroughly Guide the Candidate Through the Process**
Our firm understands that the recruitment process can be lengthy and complex. To attract the best candidates, we will thoroughly guide them by providing clear and concise instructions at each stage. We will also provide candidates with regular updates on the status of their applications.
- **Review of Hiring Policies**
Review current hiring policies and criteria regularly. This includes reassessing outdated policies that may disqualify otherwise qualified candidates. Communicate the hiring criteria clearly and transparently to candidates throughout the application process.
- **Inclusive Job Descriptions**
We will work with your municipality's HR department to create inclusive job descriptions highlighting the unique skills and experiences required for each position. We will emphasize the importance of diversity, equity, and inclusion in these job descriptions to attract a diverse pool of candidates.
- **Outreach and Marketing**
We will develop an outreach and marketing strategy to promote job openings in law enforcement to diverse communities. We will assist you in using social media, job fairs, and community events to reach potential candidates and encourage them to apply. We will also assist you in creating partnerships with local organizations serving diverse communities to further promote job openings. Our firm will develop plans to identify and target lateral transfers from other agencies and recruits.
- **Selection and recruitment process:**
We will help your municipality create an inclusive and fair selection and recruitment process for all candidates. We will train hiring managers and recruiters in best recruitment practices.

- **Thoroughly Guide Candidates Through the Process**

Guiding candidates through recruitment is critical to making them feel valued and engaged. Our team will provide support and information to hiring officers for candidates to help them navigate the process seamlessly.

- **Develop a Mentorship Program**

Developing a mentorship program that pairs recruits with experienced personnel to provide guidance and support. This program will help create a sense of community and help recruits feel valued and supported.

- **Send Out Weekly Emails or Texts**

Keeping in touch with candidates through weekly emails or texts. This communication will include updates on the recruitment process, upcoming events, and general information about the department.

- **Strategize an Online Recruiting Campaign**

Our team will work to create an online recruiting campaign that will leverage social media and other digital channels. This campaign will target a diverse pool of candidates and highlight the benefits of working for the department.

- **Use Social Media**

We will assist you in utilizing social media platforms to promote the department and create a sense of community. Our team will develop content that showcases the department's values and promotes the benefits of working for the department.

Retention Strategies

Our retention strategy aims to create a supportive work environment that values diversity and promotes inclusion. Our retention strategies include the following:

- **Develop Diversity and Inclusion Program**

We will work with the department to develop diversity and inclusion programs that promote a culture of inclusion and celebrate the differences of each individual. These programs will create a supportive work environment where everyone feels valued.

- **Offer Professional Development Opportunities**

Our team will work with the department to develop professional development opportunities that help personnel enhance their skills and advance their careers. This will promote a culture of learning and growth within the department.

- **Create Opportunities for Collaboration**

We will create opportunities for personnel to collaborate across departments and teams. This will create a sense of community and help build relationships between personnel.

- **Provide Competitive Benefits**

Our team will work with the department to develop competitive benefits packages that promote the well-being of personnel and their families. This will help create a work environment that values the health and well-being of its employees.

This Recruitment and Retention Plan emphasizes diversity, equity, and inclusion and aims to guide candidates through the process while developing a mentorship program and utilizing various communication strategies. Our plan is designed to create a supportive work environment that values diversity and promotes inclusion while providing personnel opportunities for growth and advancement. We look forward to the opportunity to work with your department to create a more diverse and inclusive work environment.

Introduction and Background

HCH was one of four consultant groups brought on by PCPC to provide diversity, equity, inclusion, and belonging (DEIB) services during the current phase of the comprehensive plan update. Our work during this phase (January 1, 2023 - June 30, 2023) included leading a process of resetting in which we suggested definitions, goals, and metrics, 1:1 DEI coaching, trainings/workshops, meetings with leadership, DEI employee performance metrics, and collaborating with other consultant teams. This work culminated with a training on reducing harm in city planning for PCPC staff. All of the materials included in this report were developed in collaborative workshops with PCPC staff.

Meet the Team:

Dr. Sharon Ravitch, Strategic Advisor/Coach

Kayland Arrington, Project Manager

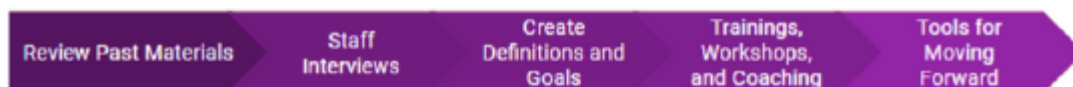
Chelsea Levesque, Communications Specialist

Background Resources:

- Why Teaching Through Crisis Requires a Radical New Mindset:
Introducing Flux Pedagogy
- Equitable teaching takes time & practice here are strategies to help:
How to Prepare Yourself—& Your Students—to Discuss Race, Identity, & Equity
- The Future of the Comprehensive Plan
- Guide to Measuring Neighborhood Change to Understand and Prevent Displacement

Work Process:

Guide to Measuring Neighborhood Change to Understand and Prevent Displacement



Goals and Metrics

Theme	How to Include in Comp Plan update	Goals and Indicators (Comp Plan update & beyond)	Things to Keep in Mind								
Structural Racism	Acknowledge the presence of structural racism in planning and connect the past to the present	<table><tr><td>Undo structurally racist systems (e.g. redlining)</td><td>Residential segregation Inequality indexes</td></tr><tr><td>Build trust with communities</td><td>Levels of government trust (survey/interview) Discredit of community experience (internal audit)</td></tr></table>	Undo structurally racist systems (e.g. redlining)	Residential segregation Inequality indexes	Build trust with communities	Levels of government trust (survey/interview) Discredit of community experience (internal audit)	Some believe it is impossible to work within a system to change the system to benefit those it has historically excluded				
Undo structurally racist systems (e.g. redlining)	Residential segregation Inequality indexes										
Build trust with communities	Levels of government trust (survey/interview) Discredit of community experience (internal audit)										
Anti-racism	Use this update as a tool for anti-racism. Learn about past racist practices and policies. Ensure that this is named in discussions about the Comp Plan update. Create a safe space for all employees and community members to address concerns. It would be wise to design best practices for creating safe environments during the engagement processes	<table><tr><td>Learn from diverse forms of knowledge and experience</td><td>Get feedback on how best practices were received (surveys) Ensure we bring resources to the table when engaging with residents (pay them for their time)</td></tr><tr><td>Create a safe environment for BIPOC employees</td><td>Minimize emotions in the workplace Hire more BIPOC employees Learn about reducing harm in the workplace</td></tr><tr><td>Increase awareness of past racist practices and policies</td><td>Acknowledge past racist practices in the story of what a comp plan is and does</td></tr><tr><td>Center access to resources by historically underrecognized audiences</td><td>Spend more time understanding the wants and needs of our historically excluded communities Ensure transparency in communications</td></tr></table>	Learn from diverse forms of knowledge and experience	Get feedback on how best practices were received (surveys) Ensure we bring resources to the table when engaging with residents (pay them for their time)	Create a safe environment for BIPOC employees	Minimize emotions in the workplace Hire more BIPOC employees Learn about reducing harm in the workplace	Increase awareness of past racist practices and policies	Acknowledge past racist practices in the story of what a comp plan is and does	Center access to resources by historically underrecognized audiences	Spend more time understanding the wants and needs of our historically excluded communities Ensure transparency in communications	Once again, it is important to acknowledge that it is difficult to use systems that have oppressed to then be a source of change. When you center the community in a true participatory fashion, this is easier. It is also important to know that community members may have different thoughts than you, and that is okay - take their lead
Learn from diverse forms of knowledge and experience	Get feedback on how best practices were received (surveys) Ensure we bring resources to the table when engaging with residents (pay them for their time)										
Create a safe environment for BIPOC employees	Minimize emotions in the workplace Hire more BIPOC employees Learn about reducing harm in the workplace										
Increase awareness of past racist practices and policies	Acknowledge past racist practices in the story of what a comp plan is and does										
Center access to resources by historically underrecognized audiences	Spend more time understanding the wants and needs of our historically excluded communities Ensure transparency in communications										

Theme	How to Include in Comp Plan update	Goals and Indicators (Comp Plan update & beyond)	Things to Keep in Mind
Equity	Center equity in the update by holding space for it and learning from communities. Communities are experts on their own lived experiences	Amplify/elevate the needs of folks who are the subjects of inequities Find the folks who are the subjects of inequities and ask them what they need and then measure progress against their concerns (hyperlocal CNA with an overrepresented sample of people historically excluded)	It is important to show that we are listening and that we care while understanding that we aren't here to "save"? We need to de-center ourselves from this work.
Displacement	Specifically define and call out gentrification and displacement in the update	Reduce displacement by reducing gentrification Length of occupancy of households Assessing changes to be proactive (permits given, recent changes in industries in which community members are employed, zoning changes) Owner vs. renter occupied Median income and median home/rental price Changes in neighborhood look Residents' feedback/postings on neighborhood apps Increase placekeeping Create cultural preservation spaces Hold more community meetings to hear community concerns/help build community	It is important to understand what city planners can and cannot influence. It is also important to keep in mind that there can be a fine line between "community revitalization" and "gentrification"
Access	Make the comp plan update accessible (language, visual, internet, etc.). Use multiple methods of outreach	Ensure that people with various types of disabilities have equal access to spaces and opportunities Examine ADA statuses Create a disability advisory committee Ensure all Philadelphians have access to the things they need to thrive Distance to schools, community resources, affordable housing, transportation, jobs, health, etc.	Keep front of mind the questions "who is this for" and "what do they need?" If you are unsure of those answers, ask them.

Conclusion

In conclusion, our team's consultancy work for the City of Philadelphia's Planning Commission has been a testament to the power of collaboration and collective effort. Throughout this phase of the comprehensive plan update, our dedicated team, along with three other consultant groups, worked collaboratively to center equity in all of our services.

Over the course of six months, from January 1, 2023, to June 30, 2023, we engaged in a comprehensive process of resetting, which involved suggesting definitions, goals, and metrics for DEIB initiatives. Through extensive 1:1 DEIB coaching, trainings/workshops, and meetings with leadership, we fostered an environment of growth and understanding. Our team also implemented DEIB employee performance metrics to promote accountability and progress.

One of the cornerstones of our success was the collaborative nature of our approach. We actively involved PCPC staff in every step of the process, hosting workshops and sessions that allowed for fruitful discussions and the exchange of ideas. The tools and resources presented in this report were all developed through these collaborative workshops, ensuring that they are tailored to the specific needs and goals of the Planning Commission.

In expressing our deepest gratitude, we thank all the PCPC staff who participated in these sessions wholeheartedly. Their invaluable contributions, dedication, and commitment to DEIB principles have been instrumental in shaping the outcomes of our work. In particular, we would like to acknowledge the exceptional efforts of Jonathan Goins, Laura Spina, Veronica Ayala-Flores, and Nicole Ozdemir.

As we conclude this report, we recognize that our work is only the beginning of a transformative journey for the City of Philadelphia's Planning Commission. We encourage continued collaboration, learning, and implementation of DEIB practices to foster a more inclusive and equitable city planning process. With the tools, resources, and shared vision outlined in this document, we are confident that the Planning Commission is well-positioned to reduce harm and build a future that reflects the diverse voices and aspirations of all its residents. **Together, we can create a truly inclusive city where every person feels a sense of belonging and has an equal opportunity to thrive.**

Contact

HCH Enterprises
3016 Post Rd,
Warwick, RI 02886
hchent.com

ravitch@upenn.edu
karrington@hchent.com
clevesque@hchent.com

Diversity, Equity, Inclusion, Justice, Access, Belonging



HCH Enterprises
3016 Post Road
Warwick, RI 02886

Corporate
401.568.5778
Program Support:
401.568.5778 (x3779)

What is DEI?

Diversity: Representation of different identities and perspectives

Equity: Equal access to opportunities, addressing systemic barriers

Inclusion: Culture where individuals feel valued, respected, and heard

[&, Access, Justice, Belonging]

Why Does DEI Matter to First Responders?

- Better community representation
- Improved service delivery
- Equitable response
- Inclusive work environment
- Increased public trust

Role of Quantitative Data in DEI

Diagnostic Metrics: Identify biases in recruitment, selection, assessment, employee satisfaction, and compensation.

Tracking Metrics: Gauge the effectiveness of D&I initiatives and identify areas for improvement.

ROI Metrics: Determine the benefits of D&I implementation on organizational performance.

Overcoming Biases: Be aware of potential biases that can impact data collection and interpretation.

Diversity, Equity, and Inclusion (DEI) Organizational Assessment Tools: A Resource Guide

June 2021

Prepared by Trinidad Tellez, MD, Principal, [Health] Equity Strategies, LLC,
in partnership with the Institute for Economic and Racial Equity, Brandeis University



[HEALTH] EQUITY STRATEGIES LLC
Putting equity, diversity, and inclusion into practice.

Brandeis



THE HELLER SCHOOL
FOR SOCIAL POLICY
AND MANAGEMENT
Institute for Economic
and Racial Equity

IERE

Diversity, Equity, and Inclusion (DEI) Organizational Assessment Tools: A Resource Guide

Overview

This is a point-in-time snapshot of instruments from the rapidly evolving field of Diversity, Equity, and Inclusion (DEI) created in 2021. This resource guide provides:

- a list of assessments by organization type;
- an overview of the benefits  and limitations  of each assessment, to assist in selection; and
- direct links and references to encourage further reading.

Content was drawn primarily from searching the grey literature in January 2021. Instruments were chosen based on potential utility for the Institute for Economic and Racial Equity's (IERE) evaluation of the [HEAL Winchendon](#) initiative, a [Moving Massachusetts Upstream](#) (MassUP) project, recency (the majority were created in the last 10 years), and reflection of a diversity of disciplines, domains, and sectors.

Purpose

This resource guide is designed to assist organizations and coalitions in a change process to identify, define, and achieve goals related to diversity, equity, inclusion, and racial justice. It is appropriate for a wide range of organizations from across the health and healthcare, human and social service, education (K-12), and non-profit sectors.

Because of the continual evolution of the DEI field as well as the variation of terms used historically in different disciplines, instruments may refer to cultural and linguistic competence, cultural effectiveness, equity, DEI, and/or justice.

Organizational assessments provide a benchmark to inform quality improvement efforts, recognizing that change is an adaptive process that takes time. All of the instruments included in this list outline a set of dimensions through which DEI is assessed, with specific indicators to reflect the extent to which DEI is put into practice. They are designed for assessment at the organizational level, *not* the individual level. For individual assessment resources, see Georgetown University's National Center for Cultural Competence.*

The project described here was supported by an Investment Award from the Commonwealth of Massachusetts Health Policy Commission (HPC). The contents of this resource guide are the sole responsibility of the authors and do not necessarily represent the views of the HPC.

* <https://nccc.georgetown.edu/assessments/>

How to Use Organizational Assessments

Assessment instruments are intended for organizations that are ready to assess and reflect on their status and progress towards DEI goals. Organizations and coalitions that conduct their own processes of exploration and interrogation can benefit from assessments as one of many tools. Assessments should be used as a basis for dialogue, and as part of a strategic change process.

The Georgetown University National Center for Cultural Competence lists the following Guiding Principles of Self-Assessment for organizations and individuals:[†]

- “Self-assessment is a strengths-based model”;
- “A safe and non-judgmental environment is essential to the self-assessment process”;
- “Self-assessment ensures the meaningful involvement of consumers, community stakeholders and key constituency groups”;
- “The results of self-assessment are used to enhance and build capacity”;
- “Diverse dissemination strategies are essential to the self-assessment process.”

Organizations can use these tools to facilitate ongoing dialogue and organizational change. Assessment results can be used to pinpoint areas for further exploration or to conduct ongoing monitoring. It is highly valuable to have multiple people in an organization share different perspectives; this provides an opportunity and space to reflect on and debrief people’s opinions. Results can provide valuable insight into areas of strength and areas of opportunity for growth. An assessment tool provides the foundation for important discussion and action. By using assessment tools, organizations can then set strategic DEI priorities.

Equity Impact Assessments (EIA) or Equity Impact Review (EIR) Tools

It is important to differentiate organizational assessments from instruments called **Equity Impact Assessments (EIA)** or **Equity Impact Review (EIR) Tools**, which outline processes to be employed when conceiving new projects and policies. Because these are also important tools for promoting equity, a few are included in the final section of this resource guide. According to Race Forward,

A Racial Equity Impact Assessment (REIA) is a systematic examination of how different racial and ethnic groups will likely be affected by a proposed action or decision. REIAs are used to minimize unanticipated adverse consequences in a variety of contexts, including the analysis of proposed policies, institutional practices, programs, plans and budgetary decisions. The REIA can be a vital tool for preventing institutional racism and for identifying new options to remedy long-standing inequities.[‡]

Why This Resource Guide, and Why Now

This resource guide was compiled by Trinidad Tellez, MD, Principal, [Health] Equity Strategies, LLC for the [Institute for Economic and Racial Equity](#) at Brandeis. IERE is the evaluation partner for the [HEAL Winchendon initiative](#), a [Moving Massachusetts Upstream \(MassUP\)](#) grantee. Jessica Santos, PhD, Principal Investigator, and Danielle Chun, Project Director, provided input, shared an early version of this tool with HEAL Winchendon partners, and utilized it to inform one aspect of IERE’s evaluation. While developed to support the efforts of HEAL Winchendon, the resource guide is also designed to serve as a public resource.

[†] <https://nccc.georgetown.edu/assessments/principles.php>

[‡] <https://www.raceforward.org/practice/tools/racial-equity-impact-assessment-toolkit>

Race Equity Impact Assessments/ Equity Impact Review Tools³⁸

+ Benefits - Limitations

A GARE Racial Equity Toolkit: An Opportunity to Operationalize Equity³⁹ Updated 2016 Government Alliance on Race & Equity (GARE)

This Racial Equity Tool can be used by community based organizations, government staff and elected officials. It is a series of questions that should be considered while early in the development process, and can also be revisited in the implementation and evaluation phases.

"Racial equity tools provide a structure for institutionalizing the consideration of racial equity."³⁹

The GARE website offers many tools and resources.

- + "Racial equity tools are designed to integrate explicit consideration of racial equity in decisions, including policies, practices, programs, and budgets. It is both a product and a process. Use of a racial equity tool can help to develop strategies and actions that reduce racial inequities and improve success for all groups . . . When racial equity is not explicitly brought into operations and decision-making, racial inequities are likely to be perpetuated."³⁹
- Appendix D lists 13 agencies/organizations that applied a Racial Equity Tool in Madison, WI, including the public health, planning, out-of-school time partners, and parks entities.
- The City of Seattle in Washington and Multnomah County in Oregon are also mentioned in the toolkit. The website lists many other examples.

- It's important to be clear that this tool is not an organizational assessment.

B Seattle Racial Equity Toolkit to Assess Policies, Initiatives, Programs, and Budget Issues⁴⁰ Seven page toolkit; The Racial Equity Analysis is made up of six steps, on two page worksheet.

- + Straightforward examples.
- It's important to be clear that this tool is not an organizational assessment.

³⁸ Race Forward Racial Equity Impact Assessment overview and guide https://www.raceforward.org/sites/default/files/RacialJusticeImpactAssessment_v5.pdf
³⁹ <https://www.racialequityalliance.org/resources/racial-equity-toolkit-opportunity-operationalize-equity/>
⁴⁰ http://www.seattle.gov/Documents/Departments/RSJI/RacialEquityToolkit_FINAL_August2012.pdf

C Center for the Study of Social Policy's Race Equity Impact Assessment⁴¹ "The Annie E. Casey Foundation's Race Matters race equity impact assessment tool [was used] as a template to develop an assessment tool that is tailored to child welfare policy decision-making."⁴¹

- + Two page tool; questions on one page.
- It's important to be clear that this tool is not an organizational assessment.

D Food System Racial Equity Assessment Tool⁴² Part of A Facilitator's Guide From University of Wisconsin-Extension, Cooperative Extension, 2017

- + Five page tool provides nice background/framing, key definitions and suggested ground rules, as well as instructions to accompany the Racial Equity Assessment Tool.
- It's important to be clear that this tool is not an organizational assessment.

⁴¹ <https://cssp.org/wp-content/uploads/2018/08/Race-Equity-Impact-Assessment-Tool.pdf>

⁴² <https://cdn.shopify.com/s/files/1/0145/8808/4272/files/G4134.pdf>

Racial Equity Toolkit

to Assess Policies, Initiatives, Programs, and Budget Issues



The vision of the Seattle Race and Social Justice Initiative is to eliminate racial inequity in the community. To do this requires ending **individual racism**, **institutional racism** and **structural racism**. The Racial Equity Toolkit lays out a process and a set of questions to guide the development, implementation and evaluation of policies, initiatives, programs, and budget issues to address the impacts on racial equity.

When Do I Use This Toolkit?

Early. Apply the toolkit early for alignment with departmental racial equity goals and desired outcomes.

How Do I Use This Toolkit?

With Inclusion. The analysis should be completed by people with different racial perspectives.

Step by step. The Racial Equity Analysis is made up of six steps from beginning to completion:



Creating Effective Community Outcomes

Outcome = the result that you seek to achieve through your actions.

Racially equitable community outcomes = the specific result you are seeking to achieve that advances racial equity in the community.

When creating outcomes think about:

- What are the greatest opportunities for creating change in the next year?
- What strengths does the department have that it can build on?
- What challenges, if met, will help move the department closer to racial equity goals?

Keep in mind that the City is committed to creating racial equity in seven key opportunity areas: **Education, Community Development, Health, Criminal Justice, Jobs, Housing, and the Environment.**

Examples of community outcomes that increase racial equity:

OUTCOME	OPPORTUNITY AREA
Increase transit and pedestrian mobility options in communities of color.	Community Development
Decrease racial disparity in the unemployment rate.	Jobs
Ensure greater access to technology by communities of color.	Community Development, Education, Jobs
Improve access to community center programs for immigrants, refugees and communities of color.	Health, Community Development
Communities of color are represented in the City's outreach activities.	Education, Community Development, Health, Jobs, Housing, Criminal Justice, Environment
The racial diversity of the Seattle community is reflected in the City's workforce across positions.	Jobs
Access to City contracts for Minority Business Enterprises is increased.	Jobs
Decrease racial disparity in high school graduation rates	Education

Additional Resources:

- RSJI Departmental Work Plan: <http://inweb/rsji/departments.htm>
- Department Performance Expectations: <http://web1.seattle.gov/DPETS/DPETSWEBHome.aspx>
- Mayoral Initiatives: <http://www.seattle.gov/mayor/issues/>

iv. Conflict of Interest

HCH does not identify any conflict of interest that may arise as a result of business activities or ventures by our firm and associates of our firm, employees, or subcontractors as a result of any individual's status as a member of the board of directors of any organization likely to interact with the Town.

v. Multi-lingual Capabilities

Miosotis Ramirez speaks Spanish fluently. All of our team have access to translator lines.

vi. Affirmative Action Program and Activities

It is the policy of HCH Enterprises, LLC to take affirmative action to ensure that applicants are employed, without regard to their religion, national origin, country of ancestral origin, race, color, sex, sexual orientation, gender identity, age, disability, genetic information, veteran status, and any other characteristics protected by law. Such action includes but is not limited to the following employment practices: hiring, promotion, demotion, transfer, recruitment or recruitment advertising, layoff, termination, rates of pay or other forms of compensation and selection for training. Reasonable accommodations to the religious observances and practices of employees or prospective employees will be made, unless doing so would result in undue hardship. In determining whether undue hardship exists, factors such as the cost to the company and the impact on the rights of other employees would be considered.

HCH strongly urges the reporting of all instances of discrimination and harassment, and prohibits retaliation against any individual who reports discrimination, harassment or participates in an investigation of such report. Appropriate disciplinary action, up to and including immediate termination, will be taken against any employee who violates this policy.

Staff Demographics

The majority (55%) of our senior staff (CEO, VPs, Directors) and over 40% of our employees identify as Black, Indigenous, or other people of color (BIPOC). Additionally, over 60% of our employees and 27% of our senior staff identify as women.

vii. Past Performance

HCH's team has over a decade of professional expertise with racial equity evaluation and analysis. Our consultants work with BIPOC communities in Philadelphia, PA, Salem and Malden, MA, and throughout the state of Rhode Island. HCH has an impeccable record of completing projects on time based on the scope of work. Our team continually finishes the work agreed upon in the time contracted.

Project: Diverse Workforce Consultant

Contracting Agency: City of Salem, Massachusetts. 93 Washington St., Salem, MA 01970

Point of Contact: Regina Zaragoza

Phone: 978) 745-9595 x41505; **Email:** rzaragoza@salem.com

Project Period: May 10, 2023- December 31, 2023

Scope: The primary objective of this project is to create a detailed plan that addresses the challenges and opportunities related to diversity recruitment and retention in the City's workforce. The plan outlines actionable steps, policies, and practices that align with best practices in DEI and HR fields. Key objectives include:

- Assessing the current workforce demographics and representation.
- Identifying barriers and biases in the recruitment and selection process.
- Proposing innovative recruitment strategies to attract diverse talent.
- Developing programs to enhance career growth and retention of diverse employees.

- Formulating guidelines for equitable compensation and benefits.

Project: Professional Consulting for ARPA Funding

Municipality: Town of Warren, RI; Warren Town Hall, 514 Main Street, Warren, RI 02885

Point of Contact: Ms. Kate Michaud, Town Manager

Phone: (401) 245-7554; **Email:** kmichaud@townofwarren-ri.gov

Project Period: June 2021 – December 2022

Scope: Since September 2021, HCH has been providing ARPA-related consulting services to Warren’s leadership, including providing guidance on federal legislation and U.S. Treasury rules, completing an initial assessment to identify and address the immediate socio-economic impact of COVID-19; recommending economic recovery and planning strategies; and performing data collection and analysis. HCH assists the Town of Warren in program management, including monitoring of updates to ARPA guidelines, compliance, reporting, and assessing the funding landscape; ensuring community engagement through structured outreach; analysis of project outcomes; and project execution. Team facilitated Town Hall meetings and community engagement. Provided marketing materials, surveys,

Project: Health Housing Healthy Communities (H3C) Initiative

Contracting Agency: Rhode Island Housing and Mortgage Finance Commission. 44 Washington Street, Providence, RI 02903

Point of Contact: Elizabeth Bioteau, RCoC Planner

Phone: (401) 429-1478; **Email:** ebioteau@rihousing.com

Project Period: September 2022 - Ongoing

Scope: HCH is currently working to develop and assist in the planning process associated with a federally funded project, the Health Housing Healthy Communities (H3C) Initiative, cumulating in the H3C Partnership Plan. The process consists of assembling stakeholders from across healthcare, housing, supportive services, and community-based providers to craft a plan that identifies processes, projects, and commitments to promote housing opportunities for vulnerable populations.

HCH is working with the RIHousing staff to conduct the planning process associated with this federally funded initiative, which culminates in a Housing, Health, and Equity Partnership Plan (“H3C Plan”). The process consists of assembling stakeholders from across healthcare, housing, supportive services, and community-based providers to craft a plan that identifies processes, projects, and commitments to promote housing opportunities for vulnerable populations, with a priority for service-enriched housing.

In partnership with the RI Executive Office of Health and Human Services and the RI Department of Health, HCH works with the RIHousing team to build on existing work that has centered on decreasing rates of lead poisoning, expanding the use of Medicaid reimbursement to provide housing stabilization and housing locator services, and coordinate investments from our accountable care organizations, MCOs, federally qualified health centers, and community development corporations.

As part of this project, RIHousing and HCH work with each of the HEZ backbone organizations and their respective development partners to align healthcare and supportive services, obtain site control, establish development and operating proformas, and secure healthcare partner investments. The goal is to develop a diverse pipeline of healthcare supported affordable housing projects and to establish a framework for replicating this method throughout the state.

RIHousing Agency, State of Rhode Island

Contracting Agency: Rhode Island Housing and Mortgage Finance Commission. 44 Washington Street, Providence, RI 02903

Point of Contact: Elizabeth Bioteau, RCoC Planner

Phone: (401) 429-1478; **Email:** ebioteau@rihousing.com

Project Period: April 2023 – November 2023

Scope: Conducting an independent evaluation of the Rhode Island Coordinated Entry System (CES) on behalf of the Rhode Island and Mortgage Finance Corporation (RIHousing). Team is developing an evaluation plan, conducting an assessment according to the evaluation plan, identifying areas for improvement, and developing recommendations. We are meeting with their committee to advise and provide outcomes.

Disparity Study to Address COVID-19 Health Disparities**Contracting Agency:** Northwestern Connecticut Community College. Park Place East, Winsted, CT 06098**Point of Contact:** Richard Piotrowski, Procurement Manager**Email:** rp Piotrowski@commnet.edu**Project Period:** July 1, 2023- Ongoing

Scope: HCH is working to provide a health equity collaboration in Northeast CT to address health disparities and enhance community engagement. We are identifying resolute staff to help coordinate services, build out partnerships, and enhance community engagement across their respective regions to address rural health equity. Our team is providing activities, which shall include partnership building/cross-sector collaboration, communications infrastructure and messaging, data collection, needs assessment, and community-driven planning, and Covid-19 testing and vaccination clinic support and outreach. HCH provides performance measures and progress reports, indicating successes and challenges during the reporting period.

Project Name: City of Philadelphia, Pennsylvania Consulting**Agency/ Sub-Agency:** City of Philadelphia Planning Commission (PCPC), Department of Planning and Development (DPD). 1515 Arch St. #13a, Philadelphia, PA 19102**Point of Contact:** Jonathan Goins, Director of Comprehensive Planning**Phone:** (215) 683-4615 **Email:** Jonathan.goins@phila.gov**Contract Period:** December 2022 – Ongoing

Description: HCH is currently providing consulting services to the DPD to support a comprehensive plan update. Our team is leading the diversity, equity, and inclusion (DEI) portion of the plan. We are working with the PCPC and DPD to review and assess the current plan and policies. Our services include developing and training for the internal staff to ensure DEI is embedded into all aspects of DPD's culture and communications and collaborating with the other consultants contributing to the PCPC plan, Phila2035. Our team consists of an expert strategic advisor from the University of Pennsylvania (Penn), a project management professional with extensive equity-related experience, a communications specialist with a DEI lens, and training facilitators that match their audience population.