

# **Building an equity foundation:** A resource to define federal agency's mission and role in shaping equity

Guide and illustrative facilitation materials

July 2021

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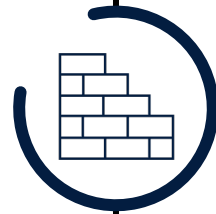


## Overview and context of the resource

Context for this resource, including how to use it

Overview of PolicyLink blueprint for how federal government can approach racial equity

Key components of this resource



## Setting the foundation for the agency's work on equity

Guidance and illustrative discussion materials for how to build a collective understanding of racial equity and your agency's mission and role in shaping it



## Reflecting on the equity impact for the major programs

Guidance and illustrative discussion materials on how to reflect on the impact of your agency's top three major programs on racial equity



## Codifying and sharing main insights across agency

Template and illustrative steps to codify the outputs of this work, share throughout your agency, and inform Executive Order requirements and long-term racial equity strategy

## Contents

### Overview and context of the resource

Setting the foundation for the agency's work on equity

Reflecting on equity impact of major programs

Codifying and sharing main insights

# This resource can help federal agencies accelerate their multi-year journey on racial equity

- **Advancing racial equity is vital to improve the lives of all Americans – especially the 100 million who are economically insecure**
- **The Executive Order on Advancing Racial Equity<sup>1</sup> accelerated this important work, calling upon federal agencies to...**
  - Conduct an Equity Assessment, to be submitted by August 2021
  - Develop an Equity Action Plan by early next year to address barriers that limit full and equal participation in agency services or federal contracting
- **Each federal agency has started to identify barriers that underserved communities and individuals face**
- **This resource further supports agencies in fulfilling EO requirements, while also laying the groundwork for a multi-year journey**
  - While the Executive Order lays out the next 200 days, this resource bridges the near term work to a long-term aspiration and plan to lift outcomes for all Americans





# How to use this resource

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## What this resource is...

- **A starting guide to help federal agencies** understand how their mission, roles, and programs can be reimagined and transformed to **improve outcomes for all Americans** – including underserved communities and individuals
- **A set of illustrative discussion materials to facilitate conversations** on the agency's role in shaping an equitable society where all can participate, prosper, and reach their full potential
- **A resource to support each federal agency in fulfilling Executive Order requirements** while linking its deliverables to a long-term strategic plan for action
- **The first resource of many** to enable agencies throughout the multi-year journey

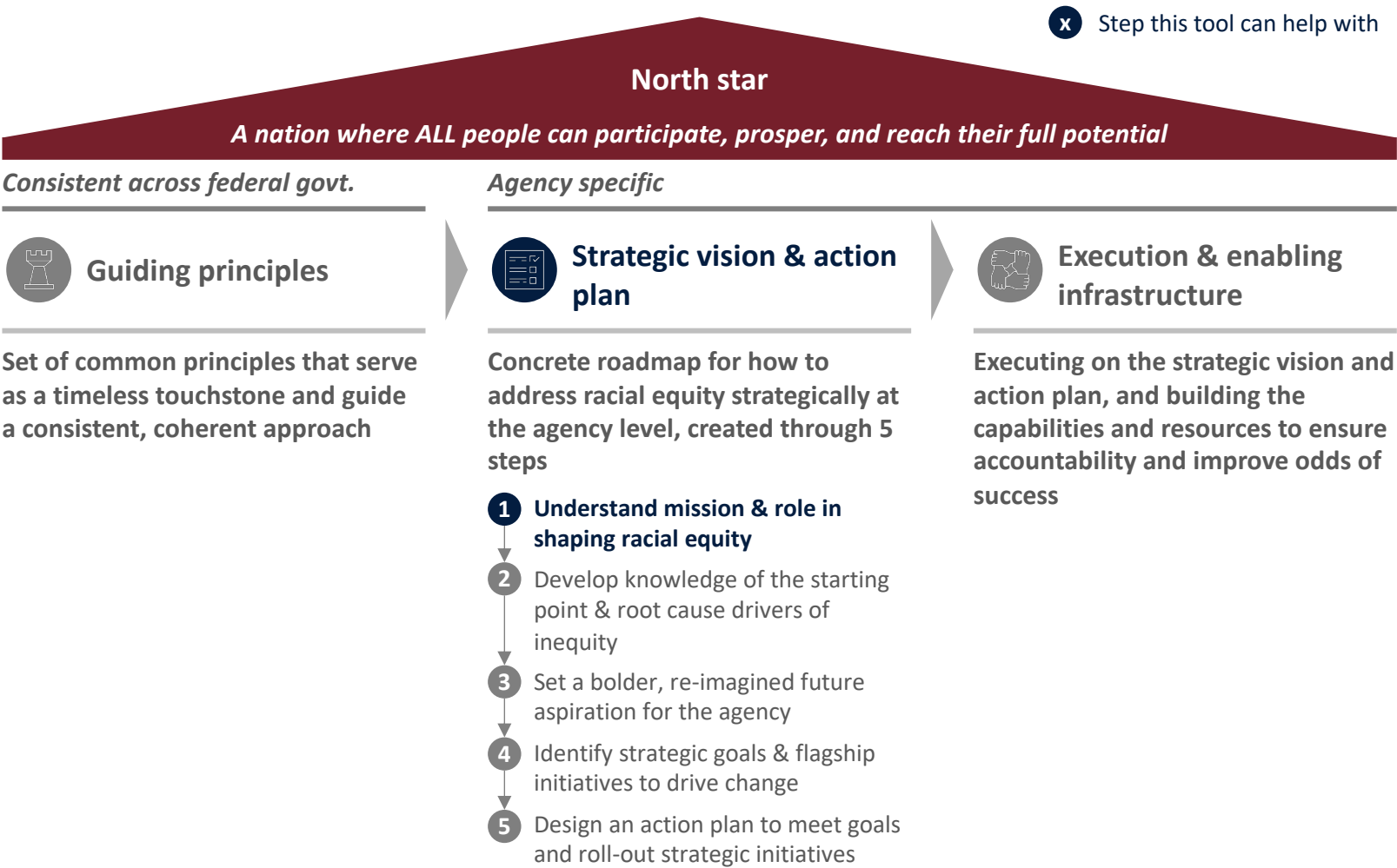


## What this resource is not...

- A comprehensive guide to achieve racial equity – this tool is meant to facilitate first steps to get started on a multi-year journey
- A requirement of the Executive Order
- A checklist that fulfills the federal responsibilities to address racial equity
- A replacement for other resources agencies may already use – this resource is meant to complement and deepen existing racial equity tools

# PolicyLink has developed a blueprint for how agencies can approach racial equity in the long-term

See our full report laying out the foundation and context for the blueprint



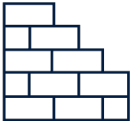

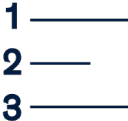
x Step this tool can help with

The three-pillar blueprint lays out a path for federal government to advance racial equity

It can help connect near-term Executive Order requirements to an agency’s long-term racial equity journey

This resource focuses on the first component of a strategic vision & action plan: understanding the mission and role of an agency in shaping racial equity

# The resource has three components to build momentum and accelerate equity work through series of workshops and written communications

	<div><div>A</div><div></div></div> <div>Setting the foundation for the agency’s work on equity</div>	<div><div>B</div><div></div></div> <div>Reflecting on the equity impact of major programs</div>	<div><div>C</div><div></div></div> <div>Codifying and sharing main insights across agency</div>
Objectives	<ul style="list-style-type: none"><li>• Create a safe space to talk about racial equity</li><li>• Share context and common guiding principles</li><li>• Reflect on agency mission and role</li></ul>	<ul style="list-style-type: none"><li>• Examine available data to assess who is impacted by agency’s top 3 programs</li><li>• Discuss how groups may be benefitted or harmed</li></ul>	<ul style="list-style-type: none"><li>• Share key findings with agency staff and incorporate them in equity assessment</li><li>• Prioritize actions to take to improve equity impacts</li></ul>
What this could look like	2-hour workshop	2-hour workshop	One page written communications, staff townhall
Potential participants	Current leaders of agency’s Executive Order equity work can lead this work, pulling in agency top team, leaders of major programs, and additional cross-functional representatives as needed		

Facilitation guidance and illustrative materials for each component to follow

# Contents

Overview and context of the resource

**Setting the foundation for the agency's work on equity**

Reflecting on equity impact of major programs

Codifying and sharing main insights

# A. Setting a foundation for racial equity work at our agency

How to align on a collective understanding  
of the importance of racial equity and reflect  
on how our agency's mission and overall roles impact it

*Illustrative materials for how leaders can navigate these  
discussions to follow*

# Facilitation guide

## Checklist for facilitators

### Before the workshop

- ☐ Send out calendar invite for upcoming workshop
- ☐ Share pre-read materials ~2 days before workshop
- ☐ Review discussion materials

### During & after the workshop

- ☐ Screenshare the discussion materials and take discussion notes
- ☐ Share discussion notes with participants after the workshop

## FAQ on facilitating a workshop

### Question



Who should I invite?

### Potential approach

- Agency's executive team (e.g., Cabinet-level)
- Leaders of major programs
- Cross-functional front-line representatives (e.g., call center employees, developers, evaluation officers)



How could I facilitate the workshop?

- Share upfront context with all participants
- Break out into smaller groups so everyone has opportunity to contribute ideas – option to prepare a facilitator and note taker for each group
- Reconvene all participants to share key insights from each group



What can I do to make the workshop a 'safe space' to talk about racial equity?

- Take notes on perspectives and ideas, without recording who shared them
- Ask agency leaders to share reflections that take a critical eye to the agency's role in shaping (in)equity

# Guidance for facilitators: Addressing a wide-range of potential questions about racial equity

Potential questions	
<div>Racial equity</div> 	Isn't it anti-American to emphasize race and take a critical eye to our nation's structures?
	Why are we saying "equity" is the north star of our democracy, and not "freedom" or "liberty"?
	Does the work of racial equity exclude White people?
<div>Role of government</div> 	Why is racial equity a responsibility of federal government? Shouldn't it start at local level?
	Why can't government have a smaller footprint in general, including in racial equity?
<div>The federal approach to racial equity</div> 	Aren't there other pressing priorities that government needs to focus on?
	Why will this work take multiple years?
	Should we engage in work that is so partisan and political?
	Haven't we already achieved equal opportunity and racial equity?
	How will we ever achieve racial equity when the work is so complicated?
	How can I, as an individual, have the power to change systemic and institutional inequity?

## Key messages

- Creating a nation that works for *all* is fundamentally an American value and represents a true love for the nation
- Equity and liberty are dual principles from our founding documents and inextricably linked; to have freedom requires achieving equity as a start
- Racial equity ensures equal opportunities for all regardless of race, and persistent inequities harm our collective wellbeing, including for White individuals
- Leadership from the federal government can ensure consistency and coordination in this work, particularly given its wide-reach and influence
- There is precedent for government playing a major role in shaping society (e.g., building the white middle class), and government has the responsibility to fix market failures
- Addressing racial equity will, in parallel, address some of the most critical problems of our society given the intertwined nature of these outcomes (e.g., housing, health, safety, education)
- Racial equity will require a fundamental re-imagining of how the federal government does work, which is not an overnight effort, and a multi-year effort can ensure longevity and sustainability
- Designing a nation that ensures high quality of life and works for *all people* is fundamental to a functioning society regardless of political affiliation
- The data shows that race is still a major determinant of access to opportunity and quality of life across majority of socioeconomic outcomes and has ripple effects for all of society
- While this is a multi-year journey, it can be done in phases, and every step forward has a major impact. We can work together, each contribute, and lean on resources to begin and continue this work
- Though systems and institutions are important to moving the needle on racial equity, individuals in their roles have a meaningful impact as the fundamental decisionmakers and actors on the ground



## Pre-read materials

### **PRE-READ** (materials to follow)

- 1 What is racial equity?**  
*Leading explanations of racial equity to ground our work*
- 2 PolicyLink Blueprint for Federal Government's Approach to Racial Equity**  
*Our long-term blueprint on how federal agencies can address racial equity*
- 3 Guiding principles for racial equity work**  
*Government-wide principles for equity*
- 4 The roles of the federal government**  
*Framework to outline the key levers and roles agencies play to drive impact for society*

### **ADDITIONAL FOUNDATIONAL RESOURCES**

**Advancing Racial Equity: A Path Forward for the Federal Government**  
*Our report on the long-term blueprint for federal agencies to address racial equity*

#### **The Equity Manifesto**

*A short declaration of the vision and purpose of equity*

#### **The Curb-Cut Effect**

*An article explaining why equity is not a zero-sum game*

#### **100 Million and Counting: A Portrait of Economic Insecurity in the United States**

*An overview of the 100 million Americans living below the federal poverty line*

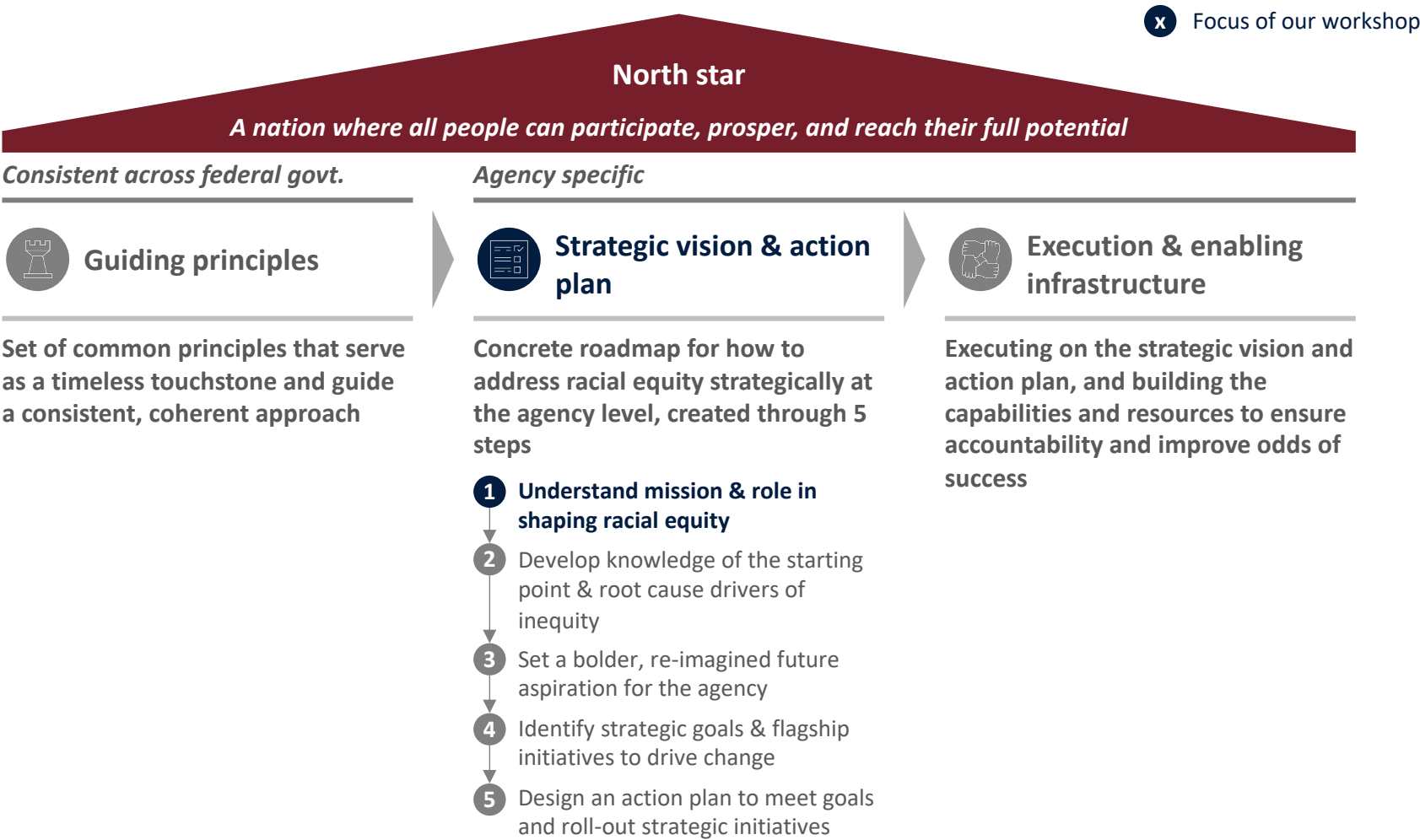
# 1. What is racial equity?

The north star of equity is a society in which **all can participate, prosper, and reach their full potential**

This requires **the consistent and systematic fair, just, and impartial treatment of all individuals**, including individuals who belong to underserved communities that have been denied such treatment<sup>1</sup>

## 2. PolicyLink has developed a blueprint for how agencies can approach racial equity in the long-term

See our full report laying out the foundation and context for the blueprint



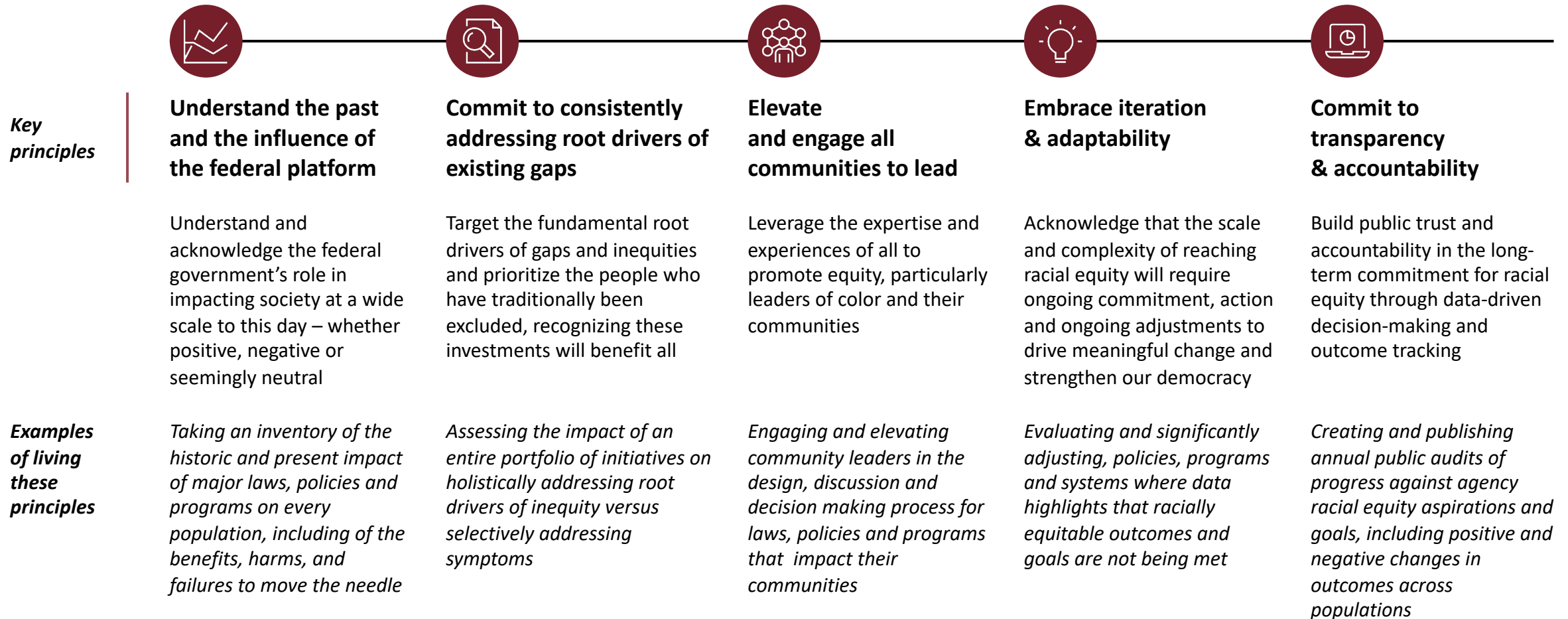
The three-pillar blueprint lays out a path for federal government to advance racial equity

It can help connect near-term Executive Order requirements to an agency’s long-term racial equity journey

This resource focuses on the first component of a strategic vision & action plan: understanding the mission and role of an agency in shaping racial equity

### 3. Guiding principles for racial equity work at the federal government

*Together, these principles support the design of a world where everyone can participate, prosper, and reach their full potential – this world is unprecedented, because it works for the 100 million*



## 4. A framework for the number of roles the federal government plays as the architect of an equitable nation

*These roles collectively help government agencies and actors drive equity internally and externally*



### Policymaker

Sets agency strategy and policies, helping to shape economy and the market, and providing two-way feedback with Legislature



### Direct provider

Delivers and implements programs & facilitates operations directly



### Funder

Provides capital through grants, budget allocations, and incentives



### Influencer

Builds national community, represents cultural values, and provides best practices to influence actions



### Buyer

Purchases goods and services & contracts with non-government entities



### Researcher & data provider

Aggregates & provides publicly available data



### Watchdog & enforcer

Ensures enactment & accountability for laws & regulations



### Convener & coordinator

Convenes stakeholders across sectors in service of action



### Employer

Hire staff to execute agency strategy and administer programs



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# Setting an Equity Foundation

*Illustrative discussion materials*



# Sample agenda

1

Objectives and discussion norms

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2

Defining racial equity

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3

Guiding principles for equity

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4

Reflection on our agency's mission and role in shaping equity

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5

Forward-looking actions to address equity



# Objectives for today's discussion

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Create a safe space to talk about racial equity

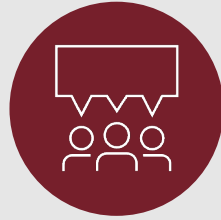


Set the context and common guiding principles for our racial equity work



Reflect on agency mission and role in shaping racial equity

# Norms for discussion



## **Take space and make space**

Be mindful of how you take up space and time; aspire to be present and listen deeply.



## **Be unconstrained in your thinking**

Approach this session by envisioning a world where anything is possible



## **Lean into learning openly**

These are difficult issues; work on expanding your capacity to sit with tension and discomfort



## **Be open and reflective**

Humility, honesty, and transparency will be essential to success

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# In what ways is our agency important for driving racial equity in our society?

1. Department of Education, "[The Federal Role in Education](#)", n.d.



## Discussion notes

*Example: The Department of Education plays a critical role in enforcing national standards of education in this country (e.g., Every Student Succeeds Act) and providing funds, mainly for students in need (e.g., Pell Grants).<sup>1</sup> Education is critical to the wellbeing of all individuals and impacts other socioeconomic outcomes such as economic mobility, employment prospects, long-term wealth.*



**Facilitator tip:** Consider use of breakout rooms, round robin format, etc. to capture as many ideas from the group as possible

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**From your perspective, what is a program (in our agency or outside) that has been successful for addressing racial equity in a sustainable – rather than short term – way?**








## Discussion notes

*Example: The Small Business Administration sets procurement goals for federal spend with small and diverse businesses (e.g., at least 5% of federal contracting dollars must go to women-owned small businesses every year), and coordinates with each agency to meet the goals.<sup>1</sup>*

1. U.S. Small Business Administration, "[Contracting assistance programs](#)", n.d.

# Recap: Our guiding principles for racial equity

*Together, these principles support the design of a world where everyone can participate, prosper, and reach their full potential – this world is unprecedented, because it works for the 100 million*

Key principles					
	<b>Understand the past and the influence of the federal platform</b>	<b>Commit to consistently addressing root drivers of existing gaps</b>	<b>Elevate and engage all communities to lead</b>	<b>Embrace iteration &amp; adaptability</b>	<b>Commit to transparency &amp; accountability</b>
	Understand and acknowledge the federal government's role in impacting society at a wide scale to this day – whether positive, negative or seemingly neutral	Target the fundamental root drivers of gaps and inequities and prioritize the people who have traditionally been excluded, recognizing these investments will benefit all	Leverage the expertise and experiences of all to promote equity, particularly leaders of color and their communities	Acknowledge that the scale and complexity of reaching racial equity will require ongoing commitment, action and ongoing adjustments to drive meaningful change and strengthen our democracy	Build public trust and accountability in the long-term commitment for racial equity through data-driven decision-making and outcome tracking
<b>Examples of living these principles</b>	<i>Taking an inventory of the historic and present impact of major laws, policies and programs on every population, including of the benefits, harms, and failures to move the needle</i>	<i>Assessing the impact of an entire portfolio of initiatives on holistically addressing root drivers of inequity versus selectively addressing symptoms</i>	<i>Engaging and elevating community leaders in the design, discussion and decision making process for laws, policies and programs that impact their communities</i>	<i>Evaluating and significantly adjusting, policies, programs and systems where data highlights that racially equitable outcomes and goals are not being met</i>	<i>Creating and publishing annual public audits of progress against agency racial equity aspirations and goals, including positive and negative changes in outcomes across populations</i>

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**What are some examples of times our work has already reflected one or more of these guiding principles?**

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**Going forward, what can we change or do to better live up to the guiding principles?**



## Discussion notes

*Example: Our agency embraces iteration and adaptability through frequent pilot programs, where we test progress and make adjustments*

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*Example: To embrace iteration and adaptability, we can pilot our new initiative to increase vaccine distribution and measure impacts (including racially disaggregated results), so that we can make adjustments as needed*



**Facilitator tip:** Encourage participants to reference guiding principles in pre-read and explicitly tie examples to the principles

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# What is our mission?

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**How does that mission serve to advance or hinder a society in which all people can prosper, participate, and reach their full potential?**

1. U.S. Department of Housing and Urban Development, "[Mission](#)", n.d.



## Discussion notes

*Insert notes*

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*Example: HUD's mission to create inclusive communities and quality affordable homes for all1 strives toward racial equity. However, we need to be mindful that public housing can (and has historically) perpetuate segregation, unless we explicitly make an effort to provide affordable housing in high-opportunity neighborhoods.*



**Facilitator tip:** Ask the group to take a critical eye, considering ways the mission falls short of serving all Americans, in addition to its benefits



# Recap: The federal government plays a number of roles as the architect of an equitable nation

*These roles collectively help government agencies and actors drive equity with both an internal and public-facing focus*



## Policymaker

Sets agency strategy and policies, helping to shape economy and the market, and providing two-way feedback with Legislature



## Direct provider

Delivers and implements programs & facilitates operations directly



## Funder

Provides capital through grants, budget allocations, and incentives



## Influencer

Builds national community, represents cultural values, and provides best practices to influence actions



## Buyer

Purchases goods and services & contracts with non-government entities



## Researcher & data provider

Aggregates & provides publicly available data



## Watchdog & enforcer

Ensures enactment & accountability for laws & regulations



## Convener & coordinator

Convenes stakeholders across sectors in service of action



## Employer

Hire staff to execute agency strategy and administer programs

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**What is the historic impact of our mission and work on underserved populations (e.g., racial and ethnic minorities)?**

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**What is our current impact on underserved populations (e.g., racial and ethnic minorities)?**



## Discussion notes

*Example: Historically, the Department of Transportation has contributed to racial inequity. For instance, the construction of interstate highways in Black communities led to destruction of their property and created barriers between Black and White communities.*

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*Example: The Department of Transportation builds infrastructure that serves all Americans. However, the majority of our grants to states goes to build roads, highways & bridges – which may not serve the transit needs of low-income, people of color, and urbanites who rely on public transit*



**Facilitator tip:** The group is also encouraged to consider other underserved populations where relevant, e.g., rural, low-income, etc.

# What are the roles our agency plays in delivering its mission?

Please check boxes and add brief description

<input type="checkbox"/> <b>Influencer:</b>	...	<input type="checkbox"/> <b>Convener &amp; coordinator:</b>	<i>SBA helps to organize regional small business councils</i>
<input type="checkbox"/> <b>Funder:</b>	<i>Small Business Administration has grant programs e.g., SBIR and STTR</i>	<input type="checkbox"/> <b>Policymaker:</b>	...
<input type="checkbox"/> <b>Watchdog &amp; enforcer:</b>	<i>SBA manages federal government's diverse procurement policies</i>	<input type="checkbox"/> <b>Buyer:</b>	...
<input type="checkbox"/> <b>Researcher &amp; data provider:</b>	...	<input type="checkbox"/> <b>Employer:</b>	...
<input type="checkbox"/> <b>Direct provider :</b>	...		

# What are potential ways we as an agency can accelerate progress to improve racial equity outcomes?

<input type="checkbox"/> Create new processes:	<i>We can incorporate a racial equity assessment into our annual planning &amp; budgeting process</i>
<input type="checkbox"/> Build incentives:	...
<input type="checkbox"/> Embed changes to agency culture:	<i>Host townhalls and program team discussions on a regular cadence where we discuss how we are living up to the five guiding principles</i>
<input type="checkbox"/> Hire and promote diverse talent	...
<input type="checkbox"/> Collaborate within agency	...
<input type="checkbox"/> Collaborate with other branches (e.g., Congress)	<i>If we had Congressional approval, we could tie our block grants to states to equity requirements to ensure that dispersal of funds benefits people of color who have been historically excluded</i>
<input type="checkbox"/> Other	...

# Group discussion/output: Our key takeaways from today’s session



How our agency  
drives racial equity



Our mission and its  
ties to equity



The roles we play to  
shape equity



Our priorities to  
accelerate equity

# Contents

Overview and context of the resource

Setting the foundation for the agency's work on equity

**Reflecting on equity impact of major programs**

Codifying and sharing main insights

## B. Reflection on racial equity impact across our major programs/services

How to reflect on the impact of our agency's top 3 major programs/services on racial equity

*Illustrative discussion materials to follow for one program*



# Facilitation guide (for program-level discussions)

The top 3 programs/services/policies to discuss can be those where the agency...



Serves highest number of people



Spends the most



Has an outsize impact on people's lives



Has specifically designed programs for historically underserved populations (e.g., racial and ethnic minorities, women)<sup>1</sup>

## Options for how structure the workshop...

- **Host one workshop with separate breakout rooms** for each program team, then share back key learnings as a full group
- **Host three separate workshops with each program team**, and engage agency leadership and cross-functional staff in each

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The materials to follow are intended to be used to discuss one program or service at a time. Please duplicate the materials for each program/service the group intends to discuss.



**Facilitator tip:** Agencies can opt to focus on top policies or services if appropriate in lieu of programs)



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# Reflecting on equity in our major programs

*Illustrative discussion materials*



# Sample agenda

1

Objectives and discussion norms

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2

Reflection on overall impact of program on racial equity

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3

Discussion on data collection and outcome tracking

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4

Agency roles and impact on racial groups

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5

Long-term program vision and opportunities for equity

# Objectives for today's discussion

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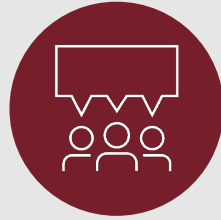


Reflect on the impact of our major programs/services on shaping racial equity



Identify key actions going forward to contribute to a more equitable society

# Norms for discussion



## Take space and make space

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## Be unconstrained in your thinking

Approach this session by envisioning a world where anything is possible



## Lean into learning openly

These are difficult issues; work on expanding your capacity to sit with tension and discomfort



## Be open and reflective

Humility, honesty, and transparency will be essential to success

**Recap:** At our previous workshop, “Setting Our Equity Foundation,” we aligned on our mission and core priorities for racial equity



**How our agency  
drives racial equity**

Placeholder for output from workshop 1



**Our mission and its  
ties to equity**

Placeholder for output from workshop 1



**The roles we play to  
shape equity**

Placeholder for output from workshop 1



**Our priorities to  
accelerate equity**

Placeholder for output from workshop 1

**How does the program serve to advance (or hinder) a society in which all people can prosper, participate, and reach their full potential?**

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**How does it help individuals and communities?**



## Discussion notes

*Insert text*

*Insert text*

# Recap: The federal government plays a number of roles as the architect of an equitable nation

*These roles collectively help government agencies and actors drive equity both internally and externally*



## Policymaker

Sets agency strategy and policies, helping to shape economy and the market, and providing two-way feedback with Legislature



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## Convener & coordinator

Convenes stakeholders across sectors in service of action



## Employer

Hire staff to execute agency strategy and administer programs



Program: *Insert program name*

# What are the roles our agency plays as it delivers this program?

Please check boxes and add brief description

☐ Influencer: ...

☐ Funder: *Some low-income families gain income from filing their taxes (e.g., Earned Income Tax Credit)*

☐ Watchdog & enforcer: *The IRS administers tax laws enacted by Congress and performs audits*

☐ Researcher & data provider: ...

☐ Direct provider : ...

☐ Convener & coordinator: ...

☐ Policymaker: ...

☐ Buyer: *The IRS contracts with tax filing services as part of our Free File program*

☐ Employer: *The IRS employs staff to respond to constituents questions and audit tax filings*

Program: *Insert program name*

# Which of the 15 outcomes is our program designed to address?

Please check boxes and list an example indicator that measures the outcome

☐ Transportation & broadband infrastructure: ...

☐ Environmental health & resilience: ...

☐ Housing security: *Section 8 – percent of rent burdened households*

☐ Food security: ...

☐ Pre-K-12 education: ...

☐ Public safety: ...

☐ Civic engagement: ...

☐ Business & sector development: ...

☐ Entrepreneurship: ...

☐ Research & innovation: ...

☐ Health & wellbeing: ...

☐ Higher education: ...

☐ Employment & wages: ...

☐ Financial inclusion: ...

☐ Social safety net & supports: *SSI – percent of eligible beneficiaries served*

**For the outcome(s) our program addresses, who is the most burdened? What are the racial demographics of the most burdened?**



## Discussion notes

*For the outcome of food insecurity, our agency has conducted research to identify demographics and geography of food insecure households. In 2019, 1 in 10 American households lacked access to affordable, nutritious food. White individuals make up about half of the total number of food insecure households, but rates of food insecurity within the Black (19%) and Hispanic (16%) communities are higher than among White Americans (8%).*

**What data is collected to measure program impact and success?**

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**Does that data inform the program's impact on the lives of the most burdened? Is the data racially disaggregated?**



## Discussion notes

*Examples: Annual surveys, assessment of program outputs, user outcomes, etc.*

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...



**Notetaker tip:** If racially-disaggregated data is not collected, you can note it down as an action item for the agency to understand its impacts

# Which groups are positively impacted by the program? Is there data to support our conclusions?

Please consider racial groups and others as applicable, and add a brief explanation

☐ **Rural Americans**

*RDOF subsidizes broadband expansion in rural areas*

☐ **Insert demographic group**

...

☐ **Insert demographic group**

...

☐ **Insert demographic group**

...

☐ **Insert demographic group**

...

☐ **Insert demographic group**

...



**Facilitator tip:** Take inventory of agency’s current understanding of who benefits. After the workshop, assign task owners to gather more data to inform or verify initial hypotheses.

# Which groups are negatively impacted by the program? Is there data to support our conclusions?

Please consider racial groups and others as applicable, and add a brief explanation

☐ *Insert demographic group* ...

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☐ *Insert demographic group* ...

---

☐ *Insert demographic group* ...

---

☐ *Insert demographic group* ...

☐ *Insert demographic group* ...

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☐ *Insert demographic group* ...



**Facilitator tip:** Take inventory of agency’s current understanding of who is harmed or excluded. After the workshop, assign task owners to gather more data to inform or verify initial hypotheses.

# What could be driving different outcomes for different groups?



## Discussion notes

*Example: Eligible SNAP recipients may not be able to access their benefits due to barriers created by in-person interview requirements.<sup>1</sup>*

1. Unrath, "Targeting, Screening and Retention: Evidence from California's Food Stamp Program", 2021

# How could the program be adjusted to ensure all people can benefit to the same extent, taking into account different starting points of different racial groups?

Please check boxes and add brief description

<input type="checkbox"/> <b>Change regulation(s)</b>	...	<input type="checkbox"/> <b>Improve monitoring and evaluation</b>	<i>Set up a performance dashboard to monitor program KPIs on a monthly basis</i>
<input type="checkbox"/> <b>Fix implementation</b>	<i>Proactively reach out (e.g., mailing a flyer of how to access) to those eligible for the Earned Income Tax Credit – a survey found &gt;40% of those eligible were unaware of the program<sup>1</sup></i>	<input type="checkbox"/> <b>Increase buy-in</b>	...
<input type="checkbox"/> <b>Increase collaboration across stakeholders</b>	...	<input type="checkbox"/> <b>Other</b>	...

1. Bhargava and Manoli, "Psychological Frictions and the Incomplete Take-up of Social Benefits", 2015



**What are the significant opportunities for our agency to improve racial equity?**

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**What can we start doing now within our existing authority, and what requires expanded authority or mandate?**



## Discussion notes

*Insert text*

---

*Insert text*



**Notetaker tip:** Expanded authority refers to changes in rule-making, while expanded mandate requires Congressional authorization

# Contents

Overview and context of the resource

Setting the foundation for the agency's work on equity

Reflecting on equity impact of major programs

**Codifying and sharing main insights**

## B. Codifying insights and sharing with agency

How to synthesize the outputs of this work to share with agency employees and inform both the Equity Assessment and long-term racial equity strategic work

## Objectives for the output template

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Share key findings with agency staff



Incorporate key findings in equity assessment for the Executive Order



Prioritize actions to take to improve equity impacts

# Template: The key learnings from this resource

*This output can serve as a communications tool to share with agency staff and inform broader EO and long-term racial equity strategic planning*

*Illustrative responses (will vary based on agency)*

## Our mission

*Including its core ties to racial equity*

*Example: Our mission is to improve the quality of life for all American people and communities, from rural to urban to all races, with emphasis on those who have historically been underserved*

## Top 3 most impactful roles we play as an agency to shape racial equity

*Our work as a funder (e.g., funding grant programs), direct provider (e.g., providing in-kind benefits), and convener (e.g., bringing together cross-sector stakeholders) are highest impact in shaping racial equity because....*

## Top 3 priorities on what we can do differently to drive racial equity going forward

- 1 *Reassess funding formulas to incorporate racial equity-based outcomes*
- 2
- 3

## What we will stop doing today in service of racial equity

*Mandating employment eligibility requirements in our service provisions*

# Next steps

