



Cultivating the capacity
for transformation in
self, systems, and society

Building bridges to resilient and inclusive communities: Operationalizing equity in the strategic planning process

AWC Annual Conference- Spokane
June 22, 2023

Tevin Medley (he/him)

1

Learning Objectives

At the end of this session, participants will...

- Practice putting an equity lens into action
- Co-create ideas for equity-focused strategies
- Discover emerging trends and promising practices related to equitable strategic planning processes



2

Pair and Share

What are some of the challenges you would like to address in your own strategic planning processes?

Common Challenges and Solutions: Operationalizing Equity in the Strategic Planning Process

Common Challenges	Equitable Strategies

Common Challenges and Solutions: Operationalizing Equity in the Strategic Planning Process

Common Challenges	Equitable Strategies
Mission, Vision, and Values need to be updated	Regularly revisit MVV and include as many voices as possible in the revision process



5

Common Challenges and Solutions: Operationalizing Equity in the Strategic Planning Process

Common Challenges	Equitable Strategies
Mission, Vision, and Values need to be updated	Regularly revisit MVV and include as many voices as possible in the revision process
Planning equity goals and actions happen separate from other planning processes	Start by reviewing current policies, practices, and initiatives. For example, community outreach



6

Common Challenges and Solutions: Operationalizing Equity in the Strategic Planning Process

Common Challenges	Equitable Strategies
Mission, Vision, and Values need to be updated	Regularly revisit MVV and include as many voices as possible in the revision process
Planning equity goals and actions happen separate from other planning processes	Start by reviewing current policies, practices, and initiatives. For example, community outreach
A focus on planning that isn't strategic	Ask, "do these goals lead to business as usual?"



7

Common Challenges and Solutions: Operationalizing Equity in the Strategic Planning Process

Common Challenges	Equitable Strategies
Mission, Vision, and Values need to be updated	Regularly revisit MVV and include as many voices as possible in the revision process
Planning equity goals and actions happen separate from other planning processes	Start by reviewing current policies, practices, and initiatives. For example, community outreach
A focus on planning that isn't strategic	Ask, "do these goals lead to business as usual?"
Community members haven't been part of the discussion	Ask, "who will be impacted but doesn't have a seat at the table?"



8

Common Challenges and Solutions: Operationalizing Equity in the Strategic Planning Process

Common Challenges	Equitable Strategies
Mission, Vision, and Values need to be updated	Regularly revisit MVV and include as many voices as possible in the revision process
Planning equity goals and actions happen separate from other planning processes	Start by reviewing current policies, practices, and initiatives. For example, community outreach
A focus on planning that isn't strategic	Ask, "do these goals lead to business as usual?"
Community members haven't been part of the discussion	Ask, "who will be impacted but doesn't have a seat at the table?"
The cost of implementation	Change can require large investments, Pulse surveys, translations services, FTEs, etc.



9

Common Challenges and Solutions: Operationalizing Equity in the Strategic Planning Process

Common Challenges	Equitable Strategies
Mission, Vision, and Values need to be updated	Regularly revisit MVV and include as many voices as possible in the revision process
Planning equity goals and actions happen separate from other planning processes	Start by reviewing current policies, practices, and initiatives. For example, community outreach
A focus on planning that isn't strategic	Ask, "do these goals lead to business as usual?"
Community members haven't been part of the discussion	Ask, "who will be impacted but doesn't have a seat at the table?"
The cost of implementation	Change can require large investments, Pulse surveys, translations services, FTEs, etc.
Unfamiliar language and concepts for staff	Planning should accompany training on key concepts and definitions



10

Common Challenges and Solutions: Operationalizing Equity in the Strategic Planning Process

Common Challenges	Equitable Strategies
Mission, Vision, and Values need to be updated	Regularly revisit MVV and include as many voices as possible in the revision process
Planning equity goals and actions happen separate from other planning processes	Start by reviewing current policies, practices, and initiatives. For example, community outreach
A focus on planning that isn't strategic	Ask, "do these goals lead to business as usual?"
Community members haven't been part of the discussion	Ask, "who will be impacted but doesn't have a seat at the table?"
The cost of implementation	Change can require large investments, Pulse surveys, translations services, FTEs, etc.
Unfamiliar language and concepts for staff	Planning should accompany training on key concepts and definitions
I have other job duties, where will I find the time?	Is operationalizing equity part of the job description?



11

Common Challenges and Solutions: Operationalizing Equity in the Strategic Planning Process

Common Challenges	Equitable Strategies
Mission, Vision, and Values need to be updated	Regularly revisit MVV and include as many voices as possible in the revision process
Planning equity goals and actions happen separate from other planning processes	Start by reviewing current policies, practices, and initiatives. For example, community outreach
A focus on planning that isn't strategic	Ask, "do these goals lead to business as usual?"
Community members haven't been part of the discussion	Ask, "who will be impacted but doesn't have a seat at the table?"
The cost of implementation	Change can require large investments, Pulse surveys, translations services, FTEs, etc.
Unfamiliar language and concepts for staff	Planning should accompany training on key concepts and definitions
I have other job duties, where will I find the time?	Is operationalizing equity part of the job description?



12

Best/Promising Practice Considerations for Bringing in Community Members	
Barriers	Considerations



13

Best/Promising Practice Considerations for Bringing in Community Members	
Barriers	Considerations
Meeting Accessibility	<ul style="list-style-type: none">• Meeting times are offered outside of traditional working hours• Provide written translation and verbal interpretation services



14

Best/Promising Practice Considerations for Bringing in Community Members	
Barriers	Considerations
Meeting Accessibility	<ul style="list-style-type: none"> • Meeting times are offered outside of traditional working hours • Provide written translation and verbal interpretation services
Frontline Communities and BIPOC Engagement	<ul style="list-style-type: none"> • Leverage existing relationships with trusted community groups to invite unconnected/under-connected populations such as communities of color, low-income, youth, elderly communities, and young families • Provide living wage stipends to compensate participants for their time



15

Best/Promising Practice Considerations for Bringing in Community Members	
Barriers	Considerations
Meeting Accessibility	<ul style="list-style-type: none"> • Meeting times are offered outside of traditional working hours • Provide written translation and verbal interpretation services
Frontline Communities and BIPOC Engagement	<ul style="list-style-type: none"> • Leverage existing relationships with trusted community groups to invite unconnected/under-connected populations such as communities of color, low-income, youth, elderly communities, and young families • Provide living wage stipends to compensate participants for their time
Overwhelm	<ul style="list-style-type: none"> • Use simple language and infographics in all engagement materials and interactions



16

Best/Promising Practice Considerations for Bringing in Community Members	
Barriers	Considerations
Meeting Accessibility	<ul style="list-style-type: none"> • Meeting times are offered outside of traditional working hours • Provide written translation and verbal interpretation services
Frontline Communities and BIPOC Engagement	<ul style="list-style-type: none"> • Leverage existing relationships with trusted community groups to invite unconnected/under-connected populations such as communities of color, low-income, youth, elderly communities, and young families • Provide living wage stipends to compensate participants for their time
Overwhelm	<ul style="list-style-type: none"> • Use accessible language and infographics in all engagement materials and interactions
Low Participation Rates	<ul style="list-style-type: none"> • Provide hourly stipends for targeted engagement to recognize and help alleviate the costs of engagement (e.g., taking time from work, finding childcare, and transportation, providing hardware, food, and asking about any other accessibility needs for full, authentic participation)



17

Let's Practice! Equity Wishlist Exercise

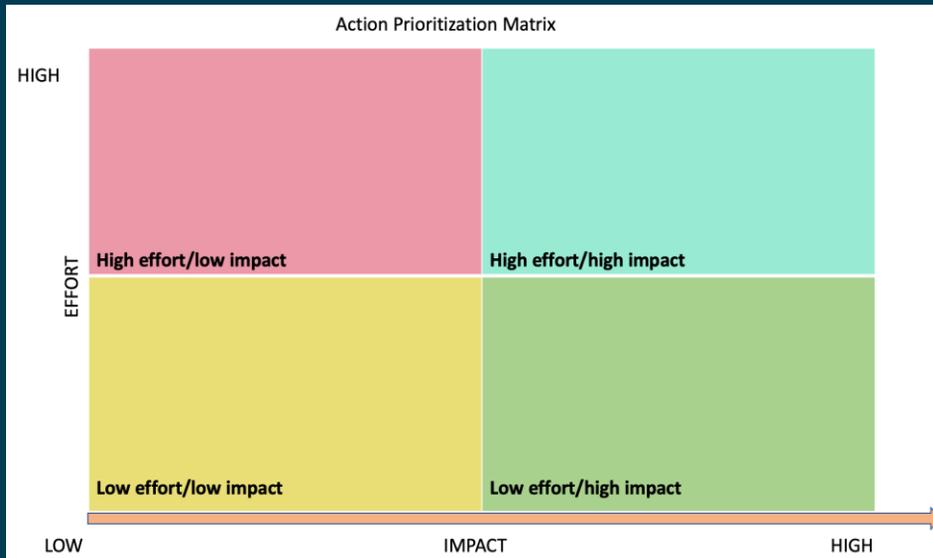
If you were told that next year your organization would have unlimited resources to address equity in the workplace, what would you wish for?

List as many ideas as you can in 1 minute!



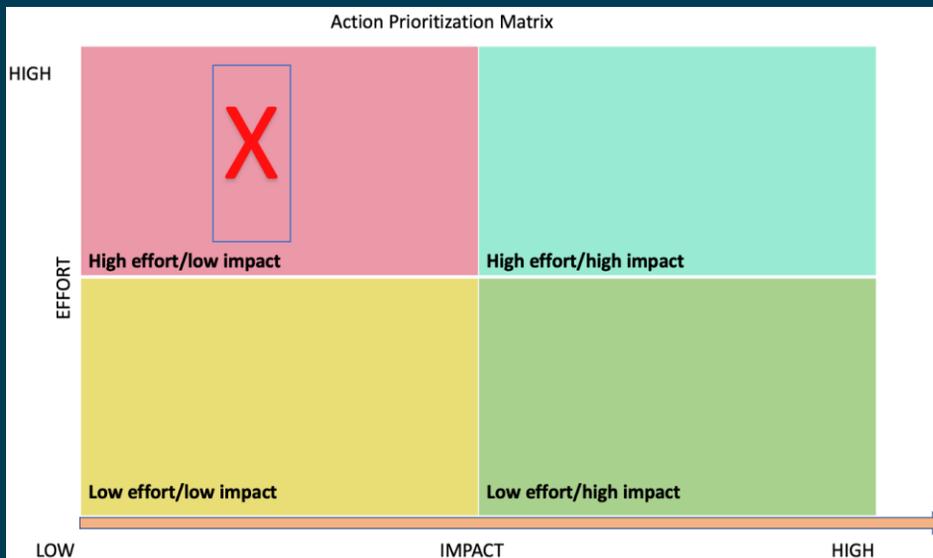
18

Action Prioritization Matrix



19

Action Prioritization Matrix



20

Let's Practice!

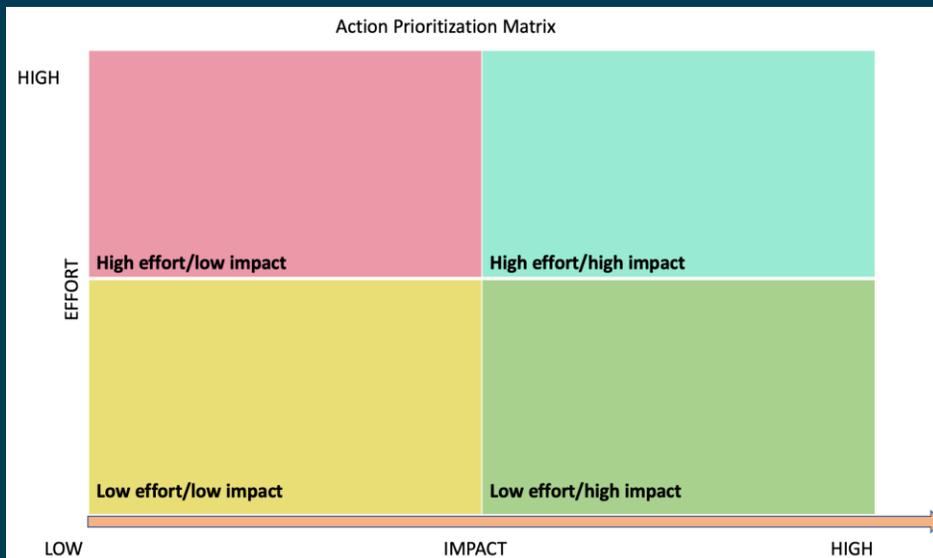
Considering effort and impact, write ideas from your wishlist into the prioritization matrix.

If you are here with a colleague, compare notes and discuss why you placed ideas where you did on the matrix. For example, what about your idea makes it high effort or high impact?



21

Action Prioritization Matrix



22

Operationalizing Equity in the Strategic Planning Process means...

- All partners and stakeholders know why the project needs their input
- When the plan is complete, all partners and stakeholders feel their ideas and goals are reflected- they have a sense of ownership
- The initiatives mission and vision are clear and have been shared for feedback
- An inclusive planning process means that new relationships are established or renewed



23

**Want to
continue the
discussion?**

Join us for a free On-Line Learning Session on
Building Bridges to Resilient and Inclusive Communities



July 21st, 12-1:30 PM

<https://resources.avantpage.com/athenagroup-session-sign-up>

24



Cultivating the capacity
for transformation in
self, systems, and society

Thank you!

tevinm@athenaplace.com