



THE TEST OF OUR PROGRESS
IS NOT WHETHER WE ADD MORE
TO THE ABUNDANCE OF THOSE
WHO HAVE MUCH, IT IS WHETHER
WE PROVIDE ENOUGH FOR
THOSE WHO HAVE TOO LITTLE.

LEADING EDGE RESEARCH SERIES

GOVERNING FOR EQUITY: IMPLEMENTING AN EQUITY LENS IN LOCAL GOVERNMENTS

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ICMA | research

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FOREWORD

Equity emerged as an important value in public affairs 50 years ago with the “new public administration” movement and started being recognized by some as a pillar of the field, along with efficiency, economy, and effectiveness starting in the nineties. It has taken time, however, to be fully accepted as a core value in the field and even longer for it to be incorporated into government practice at all levels.

The Standing Panel on Social Equity of the National Academy of Public Administration issued reports starting in 2000 that more fully defined social equity and endorsed equity as the fourth pillar of public administration. One of the “Grand Challenges” that NAPA is currently pursuing is to “Foster Social Equity”.¹ At the American Society for Public Administration, strengthening social equity was included as one of the eight principles in the revised ASPA Code of Ethics in 2013.²

Attention to the ethical obligation to promote the principles of social equity in the ICMA Code of Ethics dates back to the 1938 Code. Although the term “equity” was not used, the 1938 Code introduced the profession’s commitment to social responsibility and stressed the ethical obligation to make personnel decisions based on merit: “Political, religious, and racial considerations carry no weight.”

The same Code sees the introduction of the ethical obligation to make decisions based on justice. Tenet 4 was added in 1972 to require managers to serve the best interests of all people. New guidelines that broaden the manager’s attention to equity issues are provided in the 2020 version. Managers should notify the council of “the anticipated effects of a decision on people in their jurisdictions, especially if specific groups may be disproportionately harmed or helped.” In addition, more attention is given to the related value of inclusion. Managers should “ensure that all the people... have the ability to actively engage with their local government” by striving “to eliminate barriers to public involvement in decisions, programs, and services.” That said, the code and guidelines do not, however, include the term equity, and the guideline to Tenet 4 does not include the responsibility to promote equality in access to services, quality of services, and outcomes.

Despite this progress, there are some who argue that social equity should not be a pillar of public administration, and they claim that it cannot be a core value because research on social equity is inadequate—“greater conceptual clarity, empirical research, and normative analyses” are needed. Furthermore, practitioners do not know how to incorporate equity into their work.³ James Brunet and

¹ <https://www.napawash.org/grandchallenges/challenge/foster-social-equity>

² <https://www.aspanet.org/ASPA/Code-of-Ethics/Code-of-Ethics.aspx>

³ Durant, R. F., & Rosenbloom, D. H. (2017). The hollowing of American public administration. *American Review of Public Administration*, 47, p. 275.

I have sought to counter these arguments,⁴ and this report on Governing for Equity by Benoy Jacob helps fill the gap of knowledge about how to incorporate racial equity in the work of local governments.

“Awareness, interest, and involvement by local governments have been increasing. As one example, the Government Alliance on Race and Equity (GARE)⁵ is a national network of regional and local governments working to achieve racial equity and advance opportunities for all persons. It supports governments that have made a commitment to achieving racial equity using their own resources and working in partnership with other organizations. GARE has worked with approximately 200 regional and local governments across the country, including three of the case study governments that have been GARE members since 2017: Fort Collins, Grand Rapids, and San Antonio. ICMA and GARE have recently created a strategic affiliation to work together to advance equity and inclusion in local government leadership roles and help local governments develop and implement equity and inclusion strategies.”⁶

Interest and awareness of the need to promote racial equity have increased dramatically as a result of recent events. One of the challenges to promoting action to advance racial equity has been the difficulty of getting officials and residents to recognize disparities in the conditions of racial minorities. With the COVID-19 pandemic and public protests over police misconduct, a wide range of disparities have become obvious. These include the higher rates of infections and deaths among minorities caused by differences in exposure to the virus, housing quality, access to healthy foods, and health care. There are higher rates of unemployment and greater absence of computers and internet access for home schooling in minority and low-income households. Minorities are more likely to be victims of mistreatment by the police. “Black Lives Matter” is an assertion that differential outcomes that disfavor minorities should be identified and remediated.

How do governments develop a commitment to equity and put it into action? The governments discussed in this report provide guidance. They had already been highly active in promoting equity before this year. The analysis of the seven case studies examines the organizational learning that supported the higher level of attention to racial equity in these local governments. The distinctive features of the approach taken by these governments are:

- A commitment to promoting racial equity throughout the government.
- Using an equity lens to examine conditions, measure performance, and assess impacts and outcomes.
- Training and organizational development to raise awareness of racial bias and promote fair treatment of all residents.
- Developing programs and strategies to promote equity.
- Assessing the effectiveness of the equity initiative in reducing disparities.

The report concludes by examining five key lessons from the experiences of the case study governments. These address initiating equity from the top or the bottom of the organization, defining equity across phases of change, measuring success, being prepared for resistance, and addressing broader issues that may arise “at the edges of equity.”

The need for local governments to act decisively and inclusively to promote racial equity is paramount. This report provides the guide many governments have needed to undertake this overdue effort.

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⁴ Svara, J. H., & Brunet, J. R. (2020). The importance of social equity to prevent a hollow public administration. *American Review of Public Administration*, 50, pp. 352-357.

⁵ <https://www.racialequityalliance.org/>

⁶ <https://icma.org/articles/article/icma-and-gare-partner-advance-equity-communities>



INTRODUCTION

This report examines how American local governments—cities and counties—are actively addressing social and racial inequity in their communities. In particular, it considers the challenges and opportunities faced by public administrators when adopting an *equity lens* in their day-to-day operations.

As this report was being written, several events brought racial equity to the forefront of the public discourse. First, America, as with the rest of the world, was beset by the COVID-19 pandemic. This pandemic revealed stark vulnerabilities for disenfranchised communities throughout the country. These communities faced significantly higher mortality rates from the COVID-19 virus.¹ For example, African-Americans are nearly two times more likely to die from the virus than would be expected based on their share of the population.

The country was further reminded of its inherent inequities through the tragic killings of three unarmed African Americans—Ahmaud Arbery, George Floyd, and Breonna Taylor. These killings sparked civil uprisings nationally and internationally. Given this context, local efforts to address social and racial inequity have become particularly important and increasingly urgent. This report, then, is part of ICMA's efforts to acknowledge this urgency, while supporting city and county managers as they take meaningful steps toward ameliorating social and racial inequity.

The United States has a long history of public efforts aimed at social and economic inequality. While many of these programs were developed at the national level, it has become increasingly evident that inequality manifests itself most clearly at the local level.² Thus, even before the current civil unrest, many cities and counties had sought to address inequality through local policies and programs. Lessons about the best (and better) practices regarding the local pursuit of equity, however, remain difficult to come by. This report provides such lessons by summarizing the results of the *Governing for Equity Project*.

The *Governing for Equity Project* was conducted as part of ICMA's 2018–2019 Research Fellowship Program. This project involved a year-long effort examining seven local governments that have, in varying degrees, adopted an equity lens.³ Insights were drawn from interviews and focus groups with public managers, departmental administrators, public employees, and other stakeholders from the participating jurisdictions. Additionally, interviews were conducted with representatives of national organizations that support local government equity efforts⁴ and jurisdictions that are pursuing equity but are not characterized by manager forms of government.⁵

It is worth noting that this project was initially focused on the implementation of equity-related

¹ https://cdn1.sph.harvard.edu/wp-content/uploads/sites/1266/2020/05/20_jtc_pdw_nk_COVID19_MA-excess-mortality_text_tables_figures_final_0509_with-cover-1.pdf

² <https://opportunityinsights.org/neighborhoods/>

³ Alexandria, VA, Austin, TX, Boulder, CO, Dallas, TX, Fort Collins, CO, Grand Rapids, MI, and San Antonio, TX

⁴ Government Alliance for Racial Equity and the Rockefeller Foundation – Resilient Cities

⁵ King County, WA, Louisville, KY, and Seattle, WA

“Instead of holding back we must have the courage to step forward, take our bureaucratic structures down to the studs and rebuild them through the lens of racial and social equity.”

– Marc Ott, executive director of ICMA

performance metrics. As the project progressed, however, it became clear that the story of data and measurement, as related to equity, was not particularly straightforward. Understanding the use of equity metrics demanded a broader perspective of the organization, the community, and the connections between them. This report, then, offers insights into the implementation of equity to include issues around community engagement, leadership, and organizational innovation.

A central theme to emerge from this study is that adopting an equity lens reshapes decisions across all departments and programs. Thus, advancing equity through local governments requires a fundamental reorientation of their day-to-day operations. Drawing on this insight, this report examines local government adoption of an ‘equity lens’ through a framework of *change management*.

While a change management framework is somewhat unique to the field of equity,⁶ it offers several benefits. First, it requires that public managers acknowledge the transformational nature of equity in the day-to-day operations of the organization. Second, it transforms the otherwise amorphous concept of equity into a series of tangible actions. Finally, it provides a clear picture of the actors and processes that will be involved in (and affected by) the adoption of an equity lens. This gives public managers a starting point from which to assess their ‘readiness’ to undertake a change toward equity.

Outline of the Report

Following this introduction, this report is divided into three main parts. Part I puts forward a change management framework that is specific to the implementation of an equity lens for local governments. It outlines the four phases of this

equity-change framework and describes key lessons for the effective implementation thereof. Part II examines organizational learning as the driving force of equity change. It places the idea of innovation and learning as the foundation for a change toward equity. Where Part I and Part II ‘drilled down’ to the operational level (as much as possible), Part III offers lessons from a somewhat higher vantage point and summarizes five additional lessons gleaned from the case studies. This report also includes a series of appendices that the reader may find beneficial: 1) a brief overview of the seven cases included in the study, 2) a description of the study’s research design, and 3) the questionnaire that guided both the focus group sessions and the individual interviews.

This report includes quotes and insights (edited for clarity) as supporting evidence for many of the key findings (in bold and italics). To maintain the confidentiality of the study participants, however, these quotes have not been attributed to any specific participant. To the degree that an example is highlighted from one of the jurisdictions, the information is drawn from publicly available sources.

It is important to recognize that equity, and how it is implemented, as a lens to local government operations, will look different in different jurisdictions. So, while this report offers several lessons that can be applied to jurisdictions throughout the country, it is most aptly thought of as a *guide to action*. That said, the story of equity in local governments is still unfolding. So, lessons on how to advance equity will continue to emerge after the writing of this report. This report represents a single, though important, chapter in the emerging story of local governments and their efforts to address social and racial inequity.

⁶ Though, to some degree, it is implied in the theory of change put forward by the Government Alliance for Racial Equity.



PART I

Phases of Change Management for Equity

I think what we say is that equity isn't like an initiative or a program, rather it's a fundamentally different way of doing work.

CHANGE MANAGEMENT AND THE PHASES OF EQUITY CHANGE

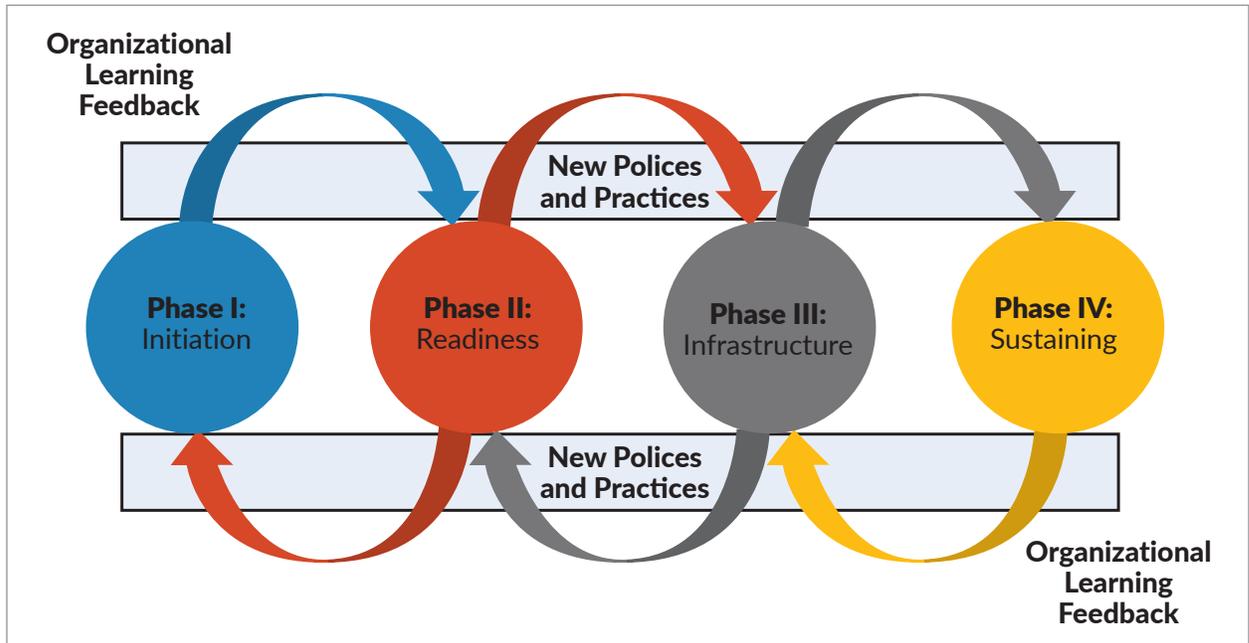
As noted in the introduction, implementing an equity lens requires a fundamental reorientation of day-to-day activities. To understand the challenges and opportunities associated with these types of changes, this report considers equity implementation from the perspective of *change management*. This perspective focuses on the intentional efforts of actors in an organization to foster and facilitate change. Change management, however, is a broad term that refers to a wide range of models, frameworks, and schemas. This conceptual breadth can be attributed to the fact that 'change' occurs in a host of settings and will, accordingly, look different in different settings. Change management then, is best understood within its specific programmatic context—in this case, equity and local governments. Thus, this section puts forward a unique change management framework (see Figure 1 on page 10) that is based upon a

synthesis of 1) the broad literature on change management, and 2) the insights about equity implementation from the study participants.

As summarized in Figure 1, the equity-change framework is organized around four phases: 1) *Initiation*, 2) *Readiness*, 3) *Infrastructure*, and 4) *Sustaining*. Each phase of change is characterized by a set of *new policies and practices* that public managers can employ to assess progress toward the implementation of an equity lens.

The phases of change—and the associated policies and practices—are driven forward through a process of *organizational learning*. This suggests that, even while we might think of change as occurring through a series of sequential phases, a change toward equity is, more realistically, a process of continuous feedback and revision. This process of organizational learning is described in Part II of this report. The rest of this section (Part I), offers a summary of the study's findings regarding the implementation of equity within each phase of change and the associated policies and practices.

FIGURE 1: Equity-Change Framework



PHASE I: INITIATING EQUITY

▶ NEW POLICIES AND PRACTICES

- Equity-Oriented Vision
- Community Engagement

The first phase of change—*initiating change*—sets the stage for implementing an equity lens. It involves recognizing and acknowledging that current practices are not working, and that a new direction will improve the *status quo*. In terms of equity, then, it requires: 1) recognizing that current practices are not advancing the needs of disenfranchised communities, particularly communities of color, and 2) implementing an equity lens in the day-to-day operations of public service delivery that will help ameliorate some of the associated inequalities. In tangible terms, initiating equity means establishing a foundation for action through: 1) the creation and adoption of an equity-oriented vision, and 2) effectively engaging community stakeholders on the issue of equity.

Creating an Equity-Oriented Vision

The initiation of a change toward equity requires, first and foremost, bringing community stakeholders together around a shared vision of equity. Creating

a vision for equity is critical for the initiation of equity because it formalizes the purpose of the organization in terms of equity. It makes clear that equity is a priority for the organization. That said, as the examples below suggest, equity-oriented vision statements will vary by jurisdiction.

Thoughts From the Field

**Quotes were drawn from interviews and focus groups.*

I think that I have been seeing much more consistency of understanding of language.... We're nowhere near universal understanding in our community or even in our organization. But I think there's a clear answer of, again, what do we mean when we talk about this?

Even though there will be some common points of emphasis, an equity vision must represent the specific idiosyncrasies of the jurisdiction and the unique culture of the organization. That said, there was wide agreement among the study participants that the key to establishing an equity-oriented vision statement—that reflects the unique nature of a particular jurisdiction—is to develop it in collaboration with community stakeholders. Fostering and facilitating conversations about equity, however, can be challenging. Different people have different understandings of the meaning and



EXAMPLES

The City of Fort Collins is an organization that supports equity for all, leading with race. We acknowledge the role of local government in helping create systems of oppression and racism and are committed to dismantling those same systems in pursuit of racial justice.

— Statement from the City of Fort Collins
Social Sustainability Department

The City of Austin's Equity Office provides leadership, guidance, and insight on equity to improve the quality of life for Austinites. We work to achieve the vision of making Austin the most livable city in the nation for all.

The Office strives to build and sustain a culture of equity across the city.

This requires tackling tough issues, such as institutional racism and implicit bias. Creating a culture of equity will ensure we are meeting the needs of all residents.

— Statement from the City of Austin
Equity Office

importance of social and racial equity. Thus, a key to creating a vision for equity is to first establish conceptual clarity across a wide range of stakeholders.

For most of the study participants, establishing some conceptual clarity around equity meant distinguishing it from related terms, such as equality. However, many study participants also noted that a particularly important distinction is between equity and diversity. Though often overlooked, this distinction is important because many local governments have been active in the 'diversity space,' and without distinguishing between the two concepts, many stakeholders may confound the two ideas and related efforts.

In short, developing conceptual clarity as early as possible provides stakeholders and public managers (or other change leaders) a shared language upon which to establish a vision for equity and to begin to articulate priorities for moving forward with the implementation of equity.

Thoughts From the Field

That's where we start unpacking that this is not just about diversity and whether we can check the box in diverse representation. Rather can we account for and problem solve and program around the needs of people where they really are? Even though we have a black population that is 7% of the overall population, if you look at the health disparities, if you look at income, if you look at transportation, if you look at all of these other social determinants, they still have far less equitable outcomes.

Community Engagement through Data and Storytelling

The second, and related, challenge for initiating equity is balancing the use of quantitative and qualitative data in the community engagement process.

Thoughts From the Field

A strategic plan wouldn't be the place I would start. I would start by listening to the community.... going and having community-listening sessions. All that could be strategically done to think about the conditions in our community and the problems that we're facing.

Even with a conceptual understanding of equity, stakeholders may not appreciate the extent to which inequity is an issue within their particular jurisdiction. Thus, to establish a clear vision of equity, change leaders must be able to engage with members of disenfranchised communities to understand the challenges they face. Then, based on this understanding, develop a quantitative and qualitative narrative that will shape subsequent engagement with other key stakeholders, i.e., elected officials, staff, and community partners.

In terms of quantitative data, the study participants were clear that this type of data will play an important role for engaging stakeholders outside of the 'targeted' disenfranchised communities. Given that (in)equity can be a sensitive topic to discuss, a data-driven story can lay plain the nature of disadvantage found in one's community while avoiding much of the underlying 'emotion' that can be attached to discussion of equity. It provides a clear statement of facts that can be hard to dispute.

Thoughts From the Field

There was so much data coming at the council, that they could not deny that this was such a huge issue for our city.

On the other hand, while a data-driven story will be important, study participants were clear that, with respect to equity, data has its limits. Despite providing a factual and unvarnished view of inequity, a data-driven approach may lack

the power to motivate. To lead a change toward equity and gain the cooperation of necessary stakeholders, equity must be initiated with a sense of urgency, which may be more difficult to communicate through story driven exclusively through data. So, while the data is important for initiating and advancing equity, it will be most powerful when presented alongside more qualitative information.

Thoughts From the Field

We decided we had both quantitative and qualitative data and we almost always in the past have led with our quantitative data. And we use qualitative stories, information from focus groups, and interviews to provide some context work. The stories were so powerful that we flipped it and we decided to lead with the stories and support those with the quantitative data.

PHASE II: READINESS

NEW POLICIES AND PRACTICES

- Trainings
- Skills and Tools
- Pilot Programs

The second phase of the equity-change framework involves the assessment of the organization's readiness to implement equity. Assessing the readiness of an organization can be a fairly 'involved' process, requiring the examination of resources, the comfort level of staff, and the systems available to promote change. This section outlines a systematic approach to assessing the 'readiness' to move forward with key organizational changes toward equity. As summarized in Figure 2, see page 13, readiness can be assessed by considering the artifacts of this phase at two different levels—individuals and departments.

Individual Readiness—Trainings

Regardless of the type of change being pursued, the primary unit of change is the individual. Organizational change, for equity or otherwise, is,

FIGURE 2: Assessing Readiness for a Change to Equity



first and foremost, advanced by helping individuals understand themselves and their circumstances. This, in turn, promotes changes in behavior, which then drives changes in organizational outputs and outcomes. As it relates to equity, individual change requires that public administrators—both staff and leadership—understand the issues of inequity, and the need to implement an equity lens. This step is commonly referred to as “normalizing.”⁷

Normalizing is a process of “establishing racial equity as a key value by developing a shared understanding of key concepts across the entire jurisdiction and a sense of urgency to make the change.” This process helps individuals across the organization understand and appreciate, among other things, the differences between individual, institutional, and structural racism, as well as implicit and explicit bias.

Thoughts From the Field

I think that I would start with low-hanging fruit. The easiest thing to do is to begin to train people.

Normalizing equity and the use of an equity lens, is, typically, accomplished through various training exercises.⁸ With this in mind, one way to assess the readiness of an organization to move forward with a change toward equity is to consider the degree to which such trainings are readily available and/or the degree to which staff and leadership are participating in such trainings.

It is, of course, important to recognize that at this stage of equity-change, it is unlikely, and perhaps unreasonable, to assess readiness with an expectation of 100% ‘buy-in’ across the organization. Thus, readiness, particularly early-on, will be based

upon the individuals within a single unit of the organization.

Individual Skills and Departmental Tools

Two more practices of readiness are tools and skills. A racial equity *tool* asks individuals to provide a structure for institutionalizing the consideration of racial equity. Equity tools provide the data upon which public administrators can understand and assess how their programs, policies, and processes are advancing social and racial equity. These tools require that staff and leadership answer the following types of questions regarding policies and programs:

1. What is the desired outcome?
2. Who will benefit?
3. What communities have been engaged in the development of the policy or program?
4. What strategies are in place for advancing a racially equitable implementation?

Relatedly, *skills* refer to the ability of individuals to adequately answer these types of questions. Thus, tools can be understood as a departmental level practice and skills as an individual level practice. Recognizing the relationship between equity tools and equity skills is important for assessing the organization’s readiness.

First, given the growing network of local governments that are adopting an equity lens, equity tools abound. Thus, one way to assess the readiness of the organization is to simply consider the adoption of and/or availability of these tools. The more tools employed within an organization, or its subunits, the higher the level of readiness. As noted by many of the study participants, while this type of assessment is relatively straightforward, it will need

⁷ Government Alliance for Racial Equity <https://www.racialequityalliance.org/>

⁸ Across the seven cases examined, these exercises were often provided through GARE. That said, in some cases they had begun to develop and offer their own customized, in-house, training.

to be balanced with an understanding of staff's ability to effectively employ the tools.

In some of the cases examined, participants noted that the adoption of an equity tool did not provide adequate data. The staff that were charged with "using" the tool did not understand how to address the questions it posed. The skills to effectively utilize the tool were missing. Thus, readiness requires the assessment of the availability of tools *as well as* the individual skills to use those tools.

Thoughts From the Field

We ended up with a lot of "n/a's" [not applicable]... staff hadn't thought enough about what equity looked like with respect to their programs. But once they started to understand equity a bit more, we started to get better data.

Departmental Readiness – Pilot Programs

The final practice of readiness is based on the departmental 'piloting' of equity-based programming, plans, or tools. To be clear, the focus is not on the presence of new plans or programs, but rather the willingness of the department to evaluate the efficacy of these equity efforts. This idea is, of course, connected to the broader insight from the study, that a change toward equity is driven by a process of organizational learning (see Part II of the report). In management terms, however, assessing readiness requires a commitment to "planning, doing, and checking."

Thoughts From the Field

It is more of an iterative process working kind of internally, working with community, adjusting those kinds of things then and doing.

Instead of going to each department and saying, okay, your whole process is changing, we're piloting it, refining what it does, refining how it works, and then go into moving it on.

PHASE III: ESTABLISHING AN EQUITY INFRASTRUCTURE

▶ NEW POLICIES AND PRACTICES

- Equity Teams
- Equity Officers
- Data Systems

The third phase of equity change emphasizes the development of an organizational *infrastructure* that supports equity implementation. It is important to recognize, of course, that the development of such infrastructure will take some time—likely, years. At the outset of Phase III, it is quite possible that the equity lens is being piloted in only a few departments. Thus, over the course of Phase III, the primary goal is to develop an infrastructure that allows the organization to move from a few pilot efforts to a more complete integration across the organization.

Based on the cases examined in this study, as well as insights from the broader set of study participants, a 'mature' equity infrastructure will be comprised of three elements: 1) equity teams, 2) equity officers, and 3) equity-based data systems.

Equity Teams

One of the key components of an equity infrastructure is "equity teams." An equity infrastructure will be comprised of two sets of teams—a departmental team⁹ and an organizational core team.

Thoughts From the Field

Each of our departments, when they go through the process of doing their equity assessment, hav to assemble a team.

First, departmental teams, as the name suggests, are 'contained' within single departments. Members of these teams have, typically, undertaken some equity-training (see normalizing Phase I) and will be able to effectively 'champion' equity. They will help develop departmental equity plans, programs, and

⁹ In smaller jurisdictions, the departmental 'team' may be comprised of a single 'equity leader.'

measures; communicate these to leadership; and provide insights back to department staff on how further action might be taken.

A second equity team is the core team. This team operates at the organizational level. While it often formalized through the city manager's office, this team might also be more informally organized. Either way, this team will be comprised of representatives across multiple departments and its objective is to integrate departmental lessons and 'best practices' throughout the organization (see Part II of this report, Organizational Learning)

Thoughts From the Field

Our first racial equity core team was composed of 60 city staff who represented all different departments across the organization, at all levels of the organization.

(Chief) Equity Officers

While equity-focused staff can be found throughout local governments, cities and counties are increasingly investing in manager- and executive-level positions referred to collectively as *chief equity officers*. Indeed, many of the study participants held this title. However, there is some debate on the correct role and timing for hiring a chief equity officer. While it is, generally, agreed that an equity officer will be a critical part of the equity infrastructure, it is less clear when and where they should be appointed.

On the one hand, there are several respondents (who were not equity officers) who longed for their organization to centralize the equity efforts in a single individual.

Thoughts From the Field

"I think it would be helpful to have an expert in equity on the city staff who we could work with, who would help us really find inequities in the work and address them earlier on rather than trying to fit it into all the other things we have to do. A person who can "make sure that we have a boots-on-the-ground person who can organize us a little bit better."

On the other hand, there was real concern that local governments might be too quick to hire an equity officer.

Thoughts From the Field

Many communities have a diversity or equity officer or a resilience officer ... sometimes a single position or maybe a staff team of two or three, depending on the size of the organization. And the unicorns are asked to come into the organization to create this, do this. And it doesn't work.

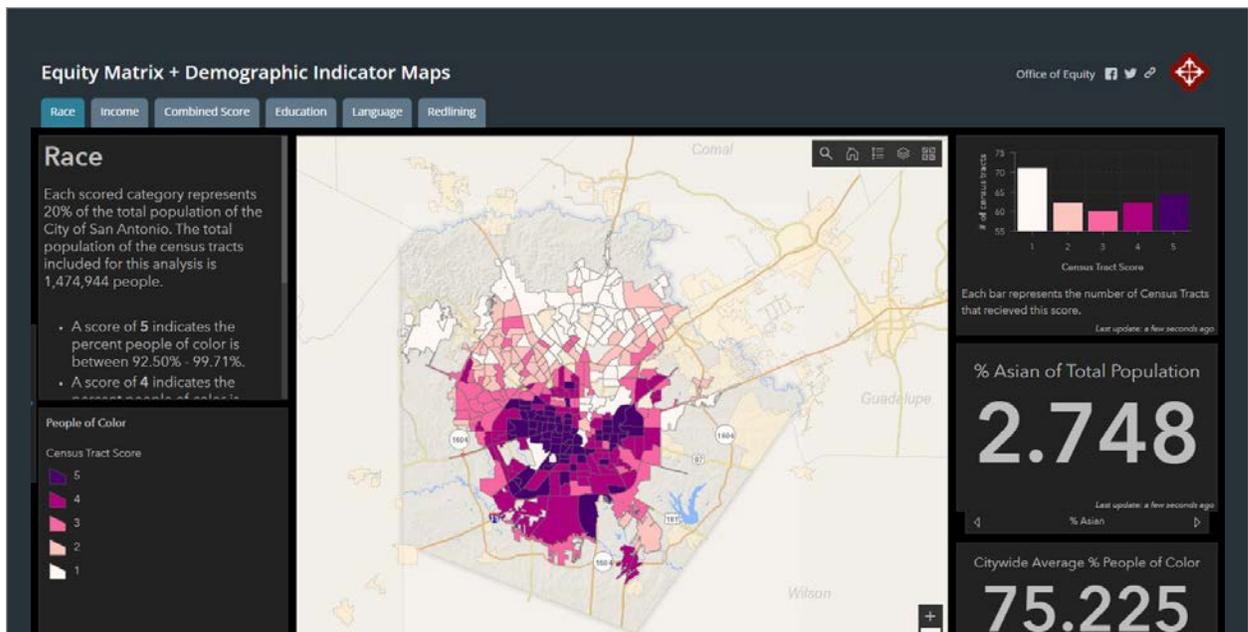
In terms of offering guidance on this matter, it was clear from the study participants that a chief equity officer is important for the overall implementation of an equity lens. However, each jurisdiction will need to think carefully about when to hire someone for this position. There are clearly challenges to bringing in a chief equity officer *too* early. More precisely, if a chief equity officer is hired earlier in the process of implementation, public managers will need to ensure that this individual has the resources *and* the authority to ensure that key sub-units implement equity tools in their programming.

Data Systems

Across all the cases studied, and the broader examination of equity, data and measurement are critical components for the effective implementation of an equity lens. Given the preponderance of data that will need to be collected, and ultimately employed in equity-based decisions, a strong data management system will need to be in place.

This equity data system will need to serve several objectives, each of which will require a mechanism for implementation. Table 1 (see page 13) summarizes these objectives and mechanisms.

The first—and primary—objective of the data system will be to collect and organize the data from (and about) the various equity tools. The implementation of an equity lens will necessarily be a data-rich endeavor. That said, it, typically, begins in one 'corner' of the organization and then diffuses outward, as more departments embrace and employ equity tools and programming. A key to the effective 'diffusion' of equity through the organization is having mechanisms to share information and data.



The City of San Antonio's Equity Atlas is an interactive tool that highlights the demographics, disparities and some infrastructure distribution within the city.

Thoughts From the Field

.... working with our Performance Accountability Office, help us identify what data sets need to be kept and tracked over time. They have to be very strong, but also have to be nuanced in what they're asking departments to do so that they're not getting defensive barriers thrown in their way.

This might be through the core team (described above), or it might be through centralized data repositories. Either way, having a mechanism that allows for equity data to be shared will accelerate and enhance the implementation of the equity lens.

Of course, collecting and organizing data is only as useful as the ability of the organization to make sense of that data. Thus, the second component of an equity data system is the analysts that will help staff and stakeholders understand the data. When asked about the skill sets required for implementing equity, many respondents ranked the ability to analyze data as one of the top skills. Finally, the third element of the data system will be an outward-facing component. While the data collected will help to inform and shape decisions about policies and programs, it should also support the community discourse around equity.

In some of the cases, dashboards track progress across a range of public programs (e.g., <https://bouldercolorado.gov/boulder-measures>). In other cases, cities are presenting their equity data in terms of an equity atlas, which provides a spatial visualization of (in)equity pictured above (e.g. <https://www.sanantonio.gov/Equity/Initiatives/Atlas>). Either way, an important component of an equity data system will be its ability help shape an equity-based discourse with external stakeholders.

PHASE IV: SUSTAINING EQUITY

▶ NEW POLICIES AND PRACTICES

- Capacity
- Internal and External Partnerships

The final phase of the equity change framework is *sustaining* equity. Given the nascent nature of equity change in local governments, there is a lot to be learned about how local governments can sustain the various organizational changes associated with the implementation of an equity lens. That said, the study participants 'agreed' that two new practices will help sustain an equity lens over time, in particular: 1) the development of 'capacity, and 2) fostering key partnerships inside and outside the organization.

Capacity for Change

One of the advantages of thinking about equity from the perspective of change management is that it explicitly recognizes that this effort is going to be difficult. Any change—equity or otherwise—is not easy. Indeed, as noted by many scholars and management analysts, most efforts at organizational change fail. This ‘failure’ is typically attributed to the inability to create the requisite organizational capacity to sustain change over the long run.

Thoughts From the Field

So, I think the biggest roadblock is just pure capacity.... I think something we've been successful with over this last year has been for the department directors and also the staff joining the work, being clear on what the commitment is on hours per month, what's the ask for their time, so that there can be that authentic conversation within that department to ensure that the employee has the space to participate.

This issue was repeated by several of the study participants. That said, it was not clear where this capacity should come from or how it could be created. Certainly, no general lessons on capacity creation were provided. However, in terms of ‘guiding’ public managers in this regard, it is important that public managers be aware of the strains an equity lens will place on the existing capacity of the organization. Then, given this awareness, develop strategies (as suggested in the quote above) to support staff as they take on new responsibilities associated with the adoption of an equity lens.

Fostering Effective Partnerships

Throughout the interviews and focus group sessions, one of the key themes to emerge was the importance of partnerships for implementing and sustaining equity. These partnerships need to be created both inside and outside of the organization.

First, as described in the previous section (Phase III), one measure of success, with respect to the adoption of an equity lens, is its integration across all the departmental units of the local government. To achieve such integration requires collaborative working relationships across units. These intra-organizational relationships will be important for sharing 1) ideas around emerging ‘best practices,’ 2) insights from data, and 3) resources for expanding capacity.

Sustaining equity also requires developing and maintaining successful partnerships outside of the organization. There are two types of external partnerships that are important. First, while local governments are critical for the advancement of equity, they are just one of many organizations. Their efforts are necessary but not sufficient. Local governments then must connect with other community partners, such as private housing developers, schools, and churches, to advance equity within one’s jurisdiction.

Thoughts From the Field

Those milestones are going to be different when you look at each department versus what's going on in the community, because we're part of a much larger system.

So, those partnerships are really important in this space. What we know is that there's all those groups that are working on their own racial equity plans and struggling in this space. So, let's bring it together so we can struggle in this space together

A second external partnership that is important for sustaining equity is the broader network of equity-oriented local governments. These peer organizations are vital sources of information and support. Connecting to local government peers will be important for sustaining the long-term effort required to advance the implementation of an equity lens.



PART II

Implementing Equity Through Organizational Learning

Implementing an equity lens is about continually working with community, innovating, learning, and transforming

POLICIES, PRACTICES, AND LEARNING

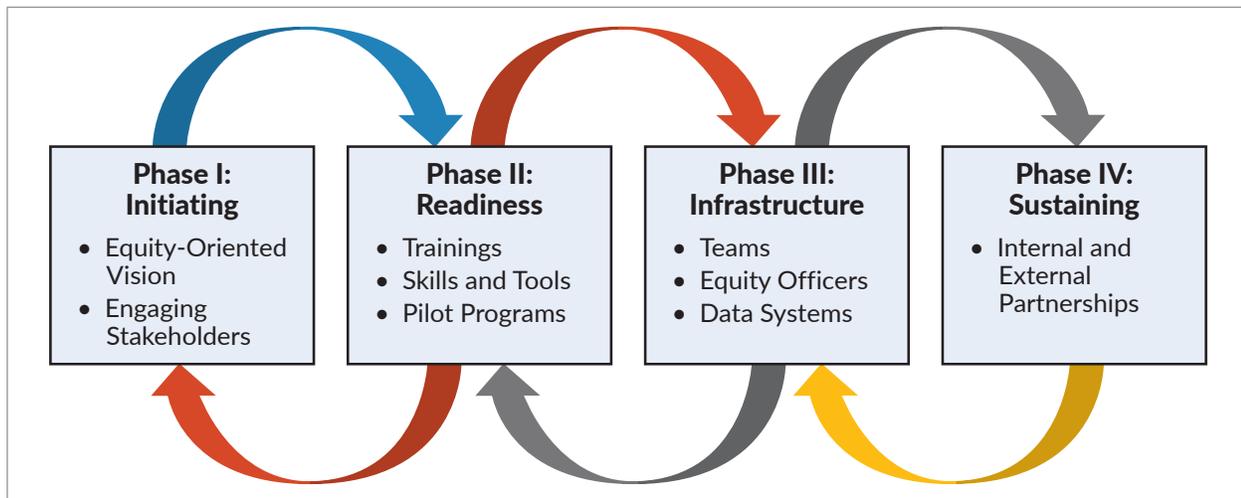
As described in the introduction to this report, the four phases of equity change are, ultimately, driven by a process of organizational learning. Thus, despite the 'linear' representation of the equity-change framework, a change toward equity is more appropriately understood as a process of feedback and revision. Based on the insights drawn from the cases in this study, it is clear that local governments will be most effective in implementing a change toward equity *if* they are characterized by systems of innovation and learning. Simply stated, a system of organizational learning is, likely, a precondition for the effective implementation of equity. There are three reasons for this. First, as described earlier, social and racial equity is a relatively nascent field-of-practice for local governments. While there are, increasingly, some ideas about better practices (many of which are highlighted in this report), there are still

several unsettled areas with respect to how best to implement and advance an equity lens. Second, local governments vary widely in their character and composition. Thus, best practices for one jurisdiction may not be as effective in others. So, implementing equity will always require some level of 'adjustment' relative to the unique nature of the particular jurisdiction. Finally, the landscape of (in)equity in the country is constantly evolving. So, an equity lens will need to continually refocus depending on changes to the understanding of the root causes of social and racial inequity.

To better understand the relationship between the phases of change and the role of organizational learning, this section examines the process of feedback and revision based on the policies and practices in each phase of change. This relationship is summarized in Figure 3 (see page 19).

A learning organization—for equity or otherwise—has systems and a culture in place that allows for: 1) creating/acquiring knowledge, 2) transferring

FIGURE 3: New Policies and Practices in Each Phase



knowledge, and 3) modifying behavior/decisions to reflect new insights. As summarized in Table 2 (see page 20), each phase of change involves each of these three learning steps. These steps allow departmental and core teams to *systematically* develop and implement the actions and policies and practices that define each phase of change.

DATA FOR LEARNING

Understanding that the new policies and practices created in each phase of change is a product of the broader process of learning (as described in the previous section) can help managers understand the relationship between the phases of change. However, recognizing the role of learning will also guide public managers with respect to the types of data that are required to support the implementation of a change toward equity.

Thoughts From the Field

So, for me it is data, data, data, and more data. Data will tell you your problem, data will tell you where you are making progress, data will tell you when you are on the right or wrong path.

Generally speaking, data are critical to any process of change. As has been noted throughout this report, this is particularly true of a change toward equity. Indeed, it was repeated by many of the

study participants that a change toward equity must be “data-driven.” This section considers how data shapes the process of organizational learning that drives the change toward equity. The goal of this section, then, is to offer public administrators some guidance on the type of data required to effectively learn about the implementation of equity in their organization.

One way to understand the types of data that will be required is to further understand the stages of organizational learning. Generally speaking, organizational learning, then, occurs through three overlapping stages. The first step is cognitive. Members of the organization are exposed to new ideas, expand their knowledge, and begin to think differently. The second is behavioral. Employees begin to internalize new insights and alter their behavior. The third step is performance improvement. Changes in behavior should lead to measurable improvements in outcomes.

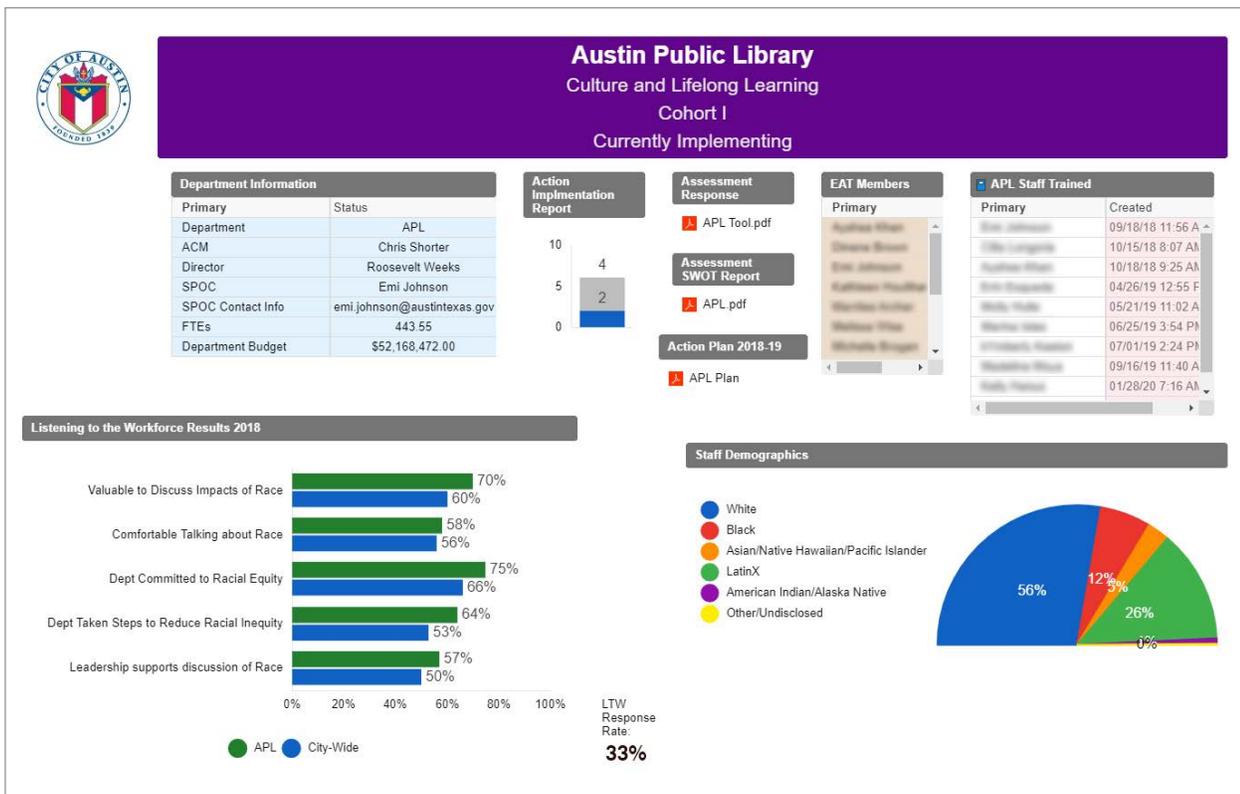
Each of these stages of learning provide data that should be collected. This section, then, offers public managers a way to consider data collection to help them understand their progress toward the implementation of an equity lens. It describes the three categories of data—cognitive, behavioral, and performance—that need to be collected and analyzed.

Cognitive Data

The first set of data that needs to be collected is cognitive. This data will help to assess the degree to which staff and leadership are ‘understanding’

TABLE 2: Summary of Phases and Learning Stages

	Creating and Acquiring Knowledge	Transferring Knowledge	Modifying Behavior
Phase I – Initiating	collection (and reassessment) of qualitative data on different metrics of equity in the community	knowledge of inequity is transferred from disenfranchised communities, to public administrators, to community stakeholders	based on the knowledge acquired about (in)equity, vision for the organization is modified
Phase II – Readiness	<p>individuals acquire knowledge through their trainings (normalization)</p> <p>the organization acquires knowledge from the data generated through the implementation of equity tools</p> <p>knowledge is created in this phase through the pilot programs—what is effective or not</p>	knowledge of trainings, skill development, and pilot programs are transferred among program participants, though still not diffused widely throughout the organization	racial equity tools are implemented in pilot departments
Phase III – Infrastructure	departmental teams will be active in acquiring knowledge through the piloted programs	<p>this phase is where most of the knowledge transfer occurs</p> <p>knowledge is deliberately transferred within departmental teams and to the core team, and through data analysts</p>	<p>racial equity tools are adopted in more departments</p> <p>data collection systems are in place</p> <p>equity officers and teams are shaping programmatic efforts</p>
Phase IV – Sustaining	knowledge about best practices is acquired from peer organizations	knowledge is transferred to community partners and peer organizations	new partnerships are formed based on emerging equity efforts



The City of Austin's departmental equity dashboards visualize each department's response to their equity assessment tool.

Thoughts From the Field

I would also say the training component was key, certainly for internal staff, then also external community partners. Because if we're going to be successful in the journey, everyone has to be coming from the same level of understanding.

the new ideas that underpin the implementation of an equity lens. Even though 'new understandings' will be ongoing, one of the key areas where cognitive data needs to be collected is in part of Phase II's training (normalizing) exercises.

To remind the reader, normalizing is a process of "establishing racial equity as a key value by developing a shared understanding of key concepts across the entire jurisdiction and a sense of urgency to make the change." This process helps individuals across the organization understand and appreciate, among other things, the differences between individual, institutional, and structural racism, as

well as implicit and explicit bias. Having a strong understanding of these issues was viewed by participants as particularly important for effectively implementing an equity lens. Given the importance of developing these shared understandings, it is important to collect data on the degree to which staff, leadership, and community stakeholders have embraced the topics of racial equity. A simple, though effective, way to gather this data is through a pre- and post-test for participants of equity trainings. Thus, beyond the basic measure of training participation, these tests will offer data on the degree to which participants gained "new knowledge" about the history or the racial history of the United States and their particular community.

Behavioral (Output) Data

The second set of data that needs to be collected (with respect to learning), is behavioral data. As its name suggests, the objective of this data is to assess changes in behavior. Another way to think about this data, is as an indicator of outputs—or as the practices of each phase of change. The presence of these practices, and the use thereof, represent

important behavioral changes in staff. For example, given the prioritization of equity, departments will need to adopt the use of equity-tools, make decisions based on those tools, participate in trainings, and establish new partnerships. None of these require cognitive adaptations beyond the initial appreciation for the issue of equity and its urgency. But they also do not offer insights into actual changes for target populations or communities. This data represents the important intermediate step of progress toward change (see Part III – Lesson 3, Understanding Success).

Performance (Outcome) Data

A third category of data that needs to be included as part of the learning is performance data. Ultimately, this data is the truest measure of success of a change toward equity. This data tracks the degree to which disenfranchised groups are seeing improvement in their community. While this type of change will take a great deal of time, the data collection effort begins in Phase I of change. More precisely, much of the data collected to understand the inequities faced by disenfranchised communities will set the baseline for evaluating progress toward equity.



PART III

Five Lessons for Implementing Equity

LESSON 1: INITIATING EQUITY FROM THE TOP OR BOTTOM OF THE ORGANIZATION

Change—for equity or otherwise—will be initiated (Phase I) from either the organization’s top-level leadership or its street-level staff. The issue of whether change should be initiated from top or bottom of the organization is central to the discourse on change management.

On the one hand, models of change management tend to assume that change is most effectively driven from the top-down. While, on the other hand, case-study evidence seems to suggest that change is most often driven from the bottom-up. This top-down/bottom-up ‘debate’ was evident in the perspectives of the study participants. For some, the only way to implement an equity lens was from the top-down, while for others it had to be from the bottom-up.

Despite the differing perspectives, it was clear from the study participants that, ultimately, equity can only be fully implemented if both leadership

TOP-DOWN

I think that relying on bubbling up in all of the departments would be a bad choice.

You have to have that top-down.

BOTTOM-UP

If it bubbles from the bottom-up, you’re going to have a lot more success in this it seems.

We definitely started from the bottom-up.

and staff are fully engaged. Thus, both approaches to initiating a change toward equity are important to understand because each present different challenges for successful implementation. Table 3 summarizes two sets of lessons for initiating equity from the top-down and the bottom-up.

TABLE 3: Summary of Phases and Learning Stages

Initiating Change from the Top-Down	Initiating Change from the Bottom-up
<p>Be Intentional</p> <p>Intentionality suggests deliberately engaging with staff on the issue of equity. This intentional engagement not only communicates that equity is a priority for the organization, but—done properly—it also serves to encourage staff as they take on the challenging work in this space.</p> <p><i>The work of racial equity and equity generally is starting with the leadership. The city manager has brought that component to it and has been very deliberate and intentional.</i></p>	<p>Look for Equity Peers in the Organization</p> <p>Given the increasingly ‘siloed’ nature of local governments, one of the key challenges of initiating equity from the bottom-up is to find ‘peers’ within the organization. There are often many units that are engaging in equity through their customer services or data collection. Connecting with these peers is important early-on. (Phase I) provides the foundation for establishing the equity teams that will become part of the equity infrastructure (Phase III).</p> <p><i>Intentionality is spread out through all the different service areas or all the different departments.</i></p>
<p>Engage Staff Early</p> <p>One of the key challenges in initiating equity from top-down is that the process can become so centralized that key tools and practices do not become part of the day-to-day operations of the organization’s sub-units. To overcome this problem, leadership should find ways to engage with and share authority over the implementation of equity with staff as early as possible.</p> <p><i>It’s not just the equity office that does this work, there’s a shared responsibility.</i></p>	<p>Engage Top Leadership</p> <p>While many of the study participants felt strongly that an equity lens will be most effectively initiated from the bottom-up, they were also clear that bottom-up efforts become limited fairly quickly. More precisely, without top-level leadership, equity will be difficult to implement.</p> <p><i>It’s really common when equity efforts start in any organization for it to start with lower-level staff, because those are the people that are typically experiencing the most inequity. And then we’ve been working to have those conversations with leadership about why it’s so important and the value we want to place on it and how we think it should be systematized and institutionalized.</i></p>

LESSON 2: DEFINING EQUITY ACROSS THE PHASES OF CHANGE

As described earlier in this report (Part I: Phases of Change Management for Equity), defining equity is vital for the effective initiation of a change toward equity. An important, though often overlooked issue, however, is how the definition of equity will vary across the phases of equity implementation.

In Phase I of the equity-change framework, equity was defined in a way that: 1) provided conceptual clarity, and 2) communicated a sense of urgency.

Given these two objectives, the shared language of equity that emerges at this stage is often couched in terms of justice or fairness. That said, definitions that effectively facilitate the broad visioning required for initiating equity lack the precision and concreteness of the real world to create the operational definitions that support the creation of tools and measures in the subsequent phases of change.

An operational definition provides descriptions of sets of actions or operations that link concepts to observations of the real world. Thus, in Phase II and III where the ‘rubber meets the road’ so

to speak, equity should be refined to advance operational efforts.

...policy formulation and implementation, public management practices, the provision of public goods and services, and administrator/resident interactions that reduce (and ultimately eliminate) disparity, marginalization, and discrimination while increasing social and political inclusion.¹⁰

This definition intentionally avoids terms that are difficult to measure, like “fairness.” It does, however, incorporate measurable concepts like disparity, discrimination, marginalization, and inclusion. This definition then provides a useful starting point from which to move from the early efforts of visioning and planning to implementation efforts, such as the development of performance metrics.

Thoughts From the Field

I think we've moved into a phase where we're working to operationalize what it means to become equitable from a service and budget standpoint, as well as other standpoints. We're getting into the phase of "how do you do it?"

Finally, in Phase III, an equity-oriented local government should be formalizing and advancing an equity infrastructure. One of the defining features of this infrastructure is the presence of data systems. As this system comes into play, the issues of disparity and marginalization can be re-examined at an even finer grain; in particular, by mapping equity to four programmatic objectives: access, quality, procedural fairness, and outcomes.

- **Access:** evaluate the extent to which public services and benefits are available to all.
- **Quality:** assess the level of consistency in public service delivery to different groups and individuals.
- **Procedural fairness:** examine problems in due process, equal protection, and eligibility criteria for public policies and programs.
- **Outcomes:** assess the degree to which policies and programs have the same impact on groups and individuals.

LESSON 3: WHAT IS SUCCESS?

During the focus groups and interviews, study participants were asked to consider what success would look like for an equity-oriented local government. Specifically:

Imagine a “fully mature” social/racial equity program, what does that look like? That is, what elements need to be a part of a social/racial equity program (e.g., strategic plan, a separate department or office, etc.), who needs to be involved, and how are these things related?

The answer to this question is important, of course, because without a strong sense of the “end game,” it will be difficult for public managers to assess progress to equity through the intermediate steps. In addressing this question, the study participants outlined two ‘states’ of success: one from the perspective of the organization, and another from the perspective of the community.

First, many of the study participants described success in terms of how the organization operated on a day-to-day basis. These descriptions emphasized the integration of equity ideas and tools across all departmental units and in the decision-making processes. For many respondents in the study, success was about gaining 100% adoption or use of an equity lens within its organization.

Thoughts From the Field

For us, the way the new structure can work is that we have a pretty aggressive goal, and by 2020, 100% of our city departments will be doing racial equity assessments.

Fully mature is that we have 100% of our departments deeply rooted in this work with a really strong and sound understanding of it.

When we moved beyond just four departments and were at a more system-wide equity effort in the sense that staff were recognizing and putting on the equity lens when they make decisions [that was a mature equity program].

¹⁰ Blessett, B., Fudge, M., & Gaynor, T.S. (2017). Moving from Theory to Practice: An Evaluative Assessment of Social Equity Approaches. Submitted to Center for Accountability and Performance and National Academy for Public Administration's Standing Panel on Social Equity in Governance



The second version of success took a longer-term community view. From this perspective, success is about tangible changes in the nature of (in)equity within their community.

Thoughts From the Field

The internalized practices, how we're going to get there. Or perhaps a program is one of the goals. But as a county, we're really wanting to see the change conditions in our community, equitable conditions in the community.

Ultimately, of course, the idea is to have a more equitable community. A community where "identity doesn't determine the outcome." This is generational work that's permanent. It's institutional and that lasts and progresses in a way that doesn't necessarily give a clear start and end, per se.

Appreciating these two perspectives of success is important. Because achieving equity at the community level is a (very) long-term effort, finding ways to celebrate success is important to sustaining equity efforts. Thus, by seeing equity as an organizational process—with related successes along the way—is critical to achieving the long-term objective of creating an equitable community.

LESSON 4: BE PREPARED FOR RESISTANCE

One of the key challenges faced by public managers in implementing an equity lens is the resistance they face. In this report, the issue of resistance has only been discussed briefly as a part of Phase I. More precisely, a large part of initiating equity was described as developing a shared language as a strategy for overcoming resistance to the idea of equity from key stakeholders. That said, study participants were clear that much of the resistance would actually come from inside the organization. Staff and leadership will resist changes toward equity, and public administrators should be prepared to address this resistance.

First, a knee-jerk reaction to the implementation of an equity lens from staff is that it implies that they, as public administrators, are racist. Part of this defensiveness is a response to some of the issues that are brought up as part of the normalization trainings. The trainings, rightfully, acknowledge that government entities have, unfortunately, played a key role in creating and maintaining social inequities. While all levels of government are culpable in having shaped the distribution of (dis) advantage across the country, this is particularly true of local governments. One need only look to the history of American land use regulations to understand how regulatory tools have been used to segregate communities in such a way as to limit opportunities for employment, education,

and access to public amenities. In addition, the use of surveys to measure implicit racism can be illuminating for persons who do not consider themselves to be intentionally racist.

Recognizing that inequities were/are not happenstance, and that the public sector has played a role in creating an uneven playing field is, however, not a judgement on those who work in local governments. Rather it is, often, the first critical challenge facing those who wish to advance social equity from within the public sector. It is important for the leaders and staff of a jurisdiction to understand their institutional history with respect to social inequity. Nevertheless, many people will have trouble coming to terms with this idea.

Thoughts From the Field

They say, "Oh, I'm not racist." And that's not what it's about. It's about recognizing the role that we all play and that's a very, very difficult conversation to have. It's hard to even open that door with a lot of people.

Again, it starts with difficult conversations, and if you have departments where you can't even have those difficult conversations, then you can't direct people to changes. You've got to win hearts and minds a little bit in this work, because everyone says, "Oh, you're trying to say I'm racist." No, that's not what we're saying. We're trying to say that our policies have resulted in inequities. We're trying to find those internal departments and champions to start having those conversations with.

In terms of being prepared for this resistance, the lesson from the study participants is to recognize that change will not come easily. Public managers and others who are committed to making a change toward equity will need to **expect a lot of resistance. It's not going to be easy. You've got to take it slowly, one bite at a time.**

LESSON 5: AT THE EDGES OF EQUITY-CHANGE

Most of the ground covered in this report represents themes that emerged consistently across the cases and interviews. They represent ideas that were generally agreed upon, based on the analysis of

transcripts across the cases. Over the course of this study, however, there were some issues that resided at the 'edge' of agreement. Not quite controversial, but not quite as consistently brought up. These issues at the 'edges of equity' are worth noting, as they may be important ideas to consider as the implementation of equity becomes more common.

The first issue is the relationship between social and racial equity. In most of the cases examined, *social* equity had been operationalized as *racial* equity. This has led to concern from some study participants that other areas of inequity may be 'forgotten,' such as inequalities based on gender or sexual identity. That said, the rationale for the current practice of "leading with race" is that it "provides an opportunity to also address other ways in which groups of people are marginalized...a racial equity framework...has applications for other marginalized groups." It is worth noting, however, that it is hard to find strong empirical evidence to support this. This is likely because it is too early for such evidence to be unearthed. So, the important point here is that as the field of equity practice matures, local governments that are leading with equity should keep an eye on opportunities to employ their tools and frameworks to advance opportunities for other disenfranchised groups.

The second issue at the edges of equity practice have to do with the relationship between *white privilege* and *anti-racism*. Throughout the focus groups and interviews, there was some consensus around the importance of recognizing one's white privilege. Increasingly, however, there are some (outside this study) that are pushing against the focus on white privilege. The primary critique is that while this recognition may be important, it is less action-oriented than efforts to promote anti-racism. That said, there is a relationship between recognizing one's privilege and taking action on behalf of others. This isn't to say that white privilege shouldn't be part of the conversations. But as local governments continue to move toward and advance social and racial equity through their organizations, they should continue to promote action-oriented programming.

Thoughts From the Field

But I also feel like the learning journey doesn't end, particularly with white privilege at play. It's a constant journey for white people to really understand and learn and grow in this space.

APPENDIX A: Case Study Overviews

ALEXANDRIA, VIRGINIA



CHIEF EQUITY OFFICER: Jaqueline N. Tucker

Note: was hired as the first Race and Social Equity Officer for the city of Alexandria, effective February 10, 2020 and was not interviewed as part of this study

REFERENCE:

<https://www.alexandriava.gov/CityManager>

Alexandria, Virginia's equity initiative started with efforts in four distinct departments — the Department of Community and Human Services, the Police Department, the Office of Human Rights, and the Court Service Unit. In each of these departments, there was interest from both leadership and frontline staff to identify opportunities to alter their services, processes, or policies to serve the community in a more equitable manner. Using momentum from these four departments' early efforts, Alexandria is now implementing strategies to take this equity work citywide.

Alexandria's equity efforts have focused both internally on strategies the city alone can take responsibility for implementing, as well as externally on equity issues existing at the community level. Internally, the city has hosted trainings for employees on the impact of unconscious bias. These trainings are conducted to encourage staff to think critically about the decisions they make and how those decisions may unintentionally perpetuate inequities. Externally, the city has been engaged with other community partners who are committed to fostering equity citywide. The local school district,

community foundation, and several nonprofits have adopted goals of pursuing equity in their own work. For instance, ACT for Alexandria (the local community foundation) has undertaken a Racial Equity Capacity Building Initiative that has included facilitating one-day workshops, hosting community conversations focused on racial equity, and conducting a six-month-long learning lab for leaders to gain knowledge and skills around fostering equity in their organizations. For the city, these efforts have provided an opportunity to participate in efforts that aim to address community-level indicators of inequity while not always having to be at the helm.

The city of Alexandria continues to formalize its efforts. It is a member of the Government Alliance on Race and Equity, which has provided tools and technical assistance to the city, specifically around the use of data in equity efforts. The city is also set to hire a race and social equity officer, the city's first staff member solely dedicated to its equity efforts, in fall 2019. In addition, Alexandria is a member of a regional cohort of municipalities engaging in equity work, providing a space to learn from the city's peers.

AUSTIN, TEXAS



EQUITY OFFICE: Strives to build and sustain a culture of equity across the city.

CHIEF EQUITY OFFICER: Brion Oaks

REFERENCE:

<https://www.austintexas.gov/department/equity-office>

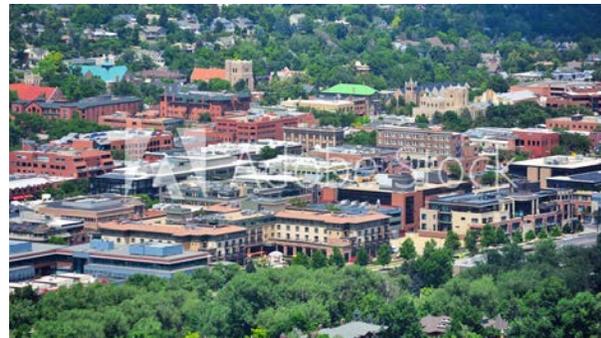
In Austin, a change in city council structure served as the catalyst for the city's equity efforts. Historically, Austin had an at-large council, seated mostly by white residents. There was a "gentleman's agreement" in place to hold one seat for a black resident and one seat for a Latinx resident, with white residents refraining from challenging those seats. For decades, this was the informal arrangement within the city. In November 2014, city council moved from at-large representation to a district-based council with an at-large mayor. Community members and advocates saw this shift as an effort to provide better representation of constituents and used the momentum from this change to push the city to broadly examine other racial disparities facing residents.

Around this time, Austin was being recognized as one of the best places to live in the country by U.S. News and World Report. Examining community data with a racial lens presented a different picture. A presentation from an Austin demographer highlighted racial disparities in the poverty rate, a study from the Martin Prosperity Institute identified Austin as the most economically segregated city in the country, and data reported by the Austin/Travis County Health and Human Services Department brought attention to racial disparities in infant mortality rates. In addition, a group of nonprofits, with assistance from researchers at the University of Texas - Austin, crafted a report highlighting health inequities in the city and calling on the city leadership to fund health-related services with an equity lens.

Austin City Council responded to the calls from the community, bolstered by data and evidence from multiple sources, by passing a resolution in May 2015. The resolution directed the city manager to form a work group that would examine how to "improve health outcomes for infants, mothers, and other members of the community." The resolution called on city departments to examine policies and practices through an equity lens and explore best practices from other cities. To provide additional capacity and leadership for this work, the city formed an Equity Office in 2016 and hired its first director, Brion Oaks, in October 2016. One of Oaks's first tasks involved developing equity tools to help the city assess its policies, practices, and budget priorities. This effort started with a visioning event, attended by over 150 community members and representatives from community organizations that pushed the city to take action around equity.

Two outcomes came from this effort. First, Austin has an established equity tool used as part of a broader equity assessment process. Departments start this process by engaging in training to normalize the conversation around race. From there, departments use the equity tool to critically examine the impacts of their work on different segments of the community. Ultimately, departments create an equity action plan with at least three specific actions they will take to reduce disparities and inequities in the department's work. After a year of work guided by the equity action plan, departments are encouraged to repeat the assessment and planning process to gauge progress and reassess the department's strategies. Second, the city has formalized an Equity Action Team (EAT) stemming from the initial group of community members and stakeholders that informed the equity assessment tool. Over 200 community members have signed on to participate in the EAT. Their work centers around three activities, each with a dedicated committee: Parks and Recreation Action Plan Support, Neighborhood Housing and Community Development, and Evaluation.

BOULDER, COLORADO



RACIAL EQUITY WORK:

Racial Equity Guiding Coalition
Racial Equity Resolution 1275
Racial Equity Plan Outline

REFERENCE:

<https://bouldercolorado.gov/racial-equity>

Boulder's current equity initiative has roots in historical efforts to improve diversity and inclusion in the community. The city's first diversity policy was developed more than 20 years ago. More recently, in 2006, Boulder established an Inclusiveness and Diversity team to focus on internal issues

around diversity and representation. By 2009, the Inclusiveness and Diversity team had completed an Inclusion and Diversity plan that provided resources to departments to develop their own plans.

Boulder's focus shifted from "inclusion and diversity" to "equity" (and specifically racial equity) starting in 2016 (City of Boulder, 2018). At this time, city leadership disseminated an employee survey to capture perceptions around inclusion and diversity, the first of its kind in Boulder. In addition, departmental directors completed assessments gauging their ability to shift departmental practices and culture to support a more diverse workforce serving a diverse populace. The city also turned its attention externally to the experience of residents. To this end, the City Manager's Office, Housing and Human Services, and the Police Department disseminated a community-wide survey in 2017 to examine perceptions of safety. This survey found that while the community was generally seen as safe and welcoming, there were stark divides when examining experiences of various subgroups. Among newcomers and people of color, feeling safe and welcome was rarer than for established residents and white community members. In addition, there was a general lack of awareness in the community that discrimination, bias, and exclusion were common experiences for many Boulder residents.

Guided by the results of the community survey, the Human Relations Commission developed a work plan with activities focused on fostering equity and creating a community where people feel welcome, safe, and respected. Activities in the work plan include expanding outreach and education on equity issues, expanding public participation opportunities, and building community awareness around the activities of other local organizations. The city started working with the Government Alliance on Racial Equity and created a Racial Equity Core Team of city employees to steer this work in 2018. As of January 2019, 58 city employees were participating on this team (City of Boulder, 2019). Rather than centralizing their equity efforts within a single office or under the leadership of an equity officer, Boulder relies on members of the Racial Equity Core Team.

Given the decentralized structure, many of Boulder's equity efforts are initiatives developed and implemented within individual departments. For

instance, Parks and Recreation provides free access to recreation centers for residents living in Boulder Housing Partners (the housing authority for the city of Boulder) in an effort to improve equity in access to services. Health and Human Services is reviewing its funding allocations and critically examining which nonprofits have been funded and which have been excluded from receiving grants from the city. The Transportation Division is working to develop a tool or strategy that can be used to look at the prioritization of capital projects through an equity lens. The Police Department's equity efforts largely focus on diversity in hiring and matching the demographics of the police force to the community. Across multiple departments, efforts to increase engagement and ensure voices of residents who have been excluded and marginalized in the past are incorporated into their strategies to foster equity.

DALLAS, TEXAS



OFFICE OF EQUITY:

Works to shape a city government and Dallas where everyone thrives

CHIEF OF EQUITY AND INCLUSION:

Liz Cedillo-Pereira

Note: was not interviewed as part of this study

REFERENCE:

<https://dallascityhall.com/departments/office-of-equity/>

Dallas's focus on equity was prompted by several coinciding factors. In 2015, Dallas received a 100 Resilient Cities grant from the Rockefeller Foundation. Participating in this initiative illuminated the need to consider equity in their efforts; to be a resilient city, Dallas also had to be an equitable city. Around the same time, the federal government was

providing more direction to communities around the Affirmatively Furthering Fair Housing (AFFH) rule. The AFFH rule required jurisdictions to examine disparities in access to safe housing, transportation, community services, and economic opportunities and how those disparities were concentrated in certain census tracts or subpopulations. Historical data revealed the number of racially/ethnically concentrated areas of poverty had increased more than fourfold over the past quarter century. In addition, research reports and data that were being disseminated and discussed highlighted the issues of childhood poverty and of a declining median income among city residents. Overall, all indicators pointed to the need for the city to take action.

Efforts to foster equity gathered steam when T. C. Broadnax assumed the position of city manager in February 2017. Immediately, his focus was on modifying the budget process to focus on equity. With his commitment to equity firmly established, the city formed the Office of Equity and Human Rights in 2018 to lead efforts to institutionalize the concept of equity into the city's processes and policies. In March 2019, Dallas's Office of Budget was trained on budgeting for equity and began the process of developing a budget equity tool with assistance from the Government Alliance on Race and Equity. In April 2019, the city hired its first equity officer, Victor Obaseki, who began working closely with the budget office on its equity efforts. As a result of this work, Dallas is set to have a complete equity in budgeting process established for the FY2020 budget cycle.

During the first year of operations, the Office of Equity and Human Rights also started to train city employees on equity-related issues and generally normalize conversations around race and equity. Part of this process involves "translating" issues of equity for staff and community members who are unfamiliar with the concept. This allows a shared understanding of the issues facing the community and the work being done to correct those inequities to emerge. In just two months, in May and June 2019, the Office of Equity and Human Rights held around 30 hours of training. Additional training is planned for fall 2019. The office anticipates forming work groups in fall 2019, charged with developing equity work plans for individual departments. Work plans should be completed by early 2020, with implementation starting soon after.

FORT COLLINS, COLORADO



SOCIAL SUSTAINABILITY:

An organization that supports equity for all, leading with race.

SOCIAL SUSTAINABILITY DEPARTMENT

HEAD: Beth Sowder

REFERENCE:

<https://www.fcgov.com/socialsustainability/equity>

Fort Collins promotes a triple-bottom line approach focused on economic, environmental, and social sustainability. Elements of equity and inclusion have been woven into the Social Sustainability Department's (SSD) work since its founding in 2012, and the focus on equity has since become more structured and formal. The SSD developed a department-specific Strategic Plan in 2016 that built on objectives outlined in the city's Strategic Plan related to social sustainability issues, including equity and inclusion. The SSD's Strategic Plan focuses on the following equity-related goals: "Promote and maintain a welcoming, inclusive community where people feel connected," "Encourage transportation options that are inclusive to all populations," "Expand the city's diversity, inclusion and equity goals," and "Support programs that enable all residents to have equal access and opportunities to meet their basic needs" (City of Fort Collins, 2016).

At the time the SSD Strategic Plan was drafted, there was no dedicated staff person to coordinate work around these goals. To lead these efforts, the city formed an internal equity team composed of employees from across the city system. In 2017, Fort Collins hired its first equity and inclusion coordinator, housed in the SSD and reporting to

the SSD director, to oversee the city's equity work. With an equity and inclusion coordinator on board, the internal equity team continued to meet, and the equity and inclusion coordinator assumed the role of coordinating those efforts promoted by the equity team and its subcommittees. The city of Fort Collins also joined the Government Alliance on Race and Equity (GARE) in 2017. Aligning with this affiliation, the city has adopted a vision of "equity for all, leading with race" (City of Fort Collins, 2020).

Equity-related achievements in Fort Collins include increasing the city's Municipal Equality Index (focused on LGBTQ+ equity), developing equity metrics for the Transportation Master Plan, providing access to the city's bike share program for low-income residents, creating a campaign to promote an inclusive and respectful workplace culture, and examining barriers to participation on city boards and commissions for diverse populations. In July 2019, the Fort Collins City Council adopted 20 council priorities, including one focused on "implement[ing] the usage of an equity lens" (City of Fort Collins, 2019). The core equity team is now being restructured to better support the upcoming work outlined under this council priority. Upcoming equity-related projects for the city include developing a dashboard with equity metrics, developing equity trainings for staff, and examining current public engagement efforts.

GRAND RAPIDS, MICHIGAN



RACIAL EQUITY HERE INITIATIVE:

Prioritizing equity by partnering with the Government Alliance on Race and Equity
<https://bit.ly/33duLZO>

CITY STRATEGIC PLAN

Leveraging city influence to intentionally remove and prevent barriers created by systemic and institutional injustice
<https://bit.ly/2UV5gaW>

Grand Rapids was prompted to address its equity issues by reports of racially based economic disparities existing for residents. Forbes magazine had identified Grand Rapids as the second worst city for African Americans economically, and a separate report noted Grand Rapids had the greatest economic disparities in Western Michigan. In 2016, newly elected Mayor Rosalynn Bliss made pursuing racial equity a top priority in her inauguration speech, providing staff with a directive to take action. To gain technical assistance and develop a path forward, Grand Rapids joined the Government Alliance on Race and Equity (GARE). At the time, it was the only city that had both its mayor and city manager participating on its GARE team, indicating the importance of the issue to city leadership. In 2017, Grand Rapids boosted its commitment to equity by joining Racial Equity Here, a project of Living Cities and GARE engaging five cities in advanced training and technical assistance to identify and address systemic inequities.

Grand Rapids' approach to developing more equitable policies and systems was captured in a Racial Equity Plan for the city, developed in 2016 and revised in 2018. Grand Rapids' commitment to equity was reinforced when new City Manager Mark Washington was hired in October 2018. The city had never had a strategic plan; crafting one became a priority for the City Manager's Office. Washington came into his new role with some exposure to Grand Rapids' efforts around equity as he had been involved in Austin's equity initiative while serving there as the assistant city manager. The need to draft a strategic plan provided the city with an opportunity to declare equity as a foundational value of the city, impacting the work of every department. "Equity" was included as one of six values driving the plan, along with accountability, collaboration, customer service, innovation, and sustainability (City of Grand Rapids, 2019). For Grand Rapids, fostering equity means "leveraging city influence to intentionally remove and prevent barriers created by systemic and institutional injustice" (City of Grand Rapids, 2019, p. 8). To ensure this value was embedded into the objectives and strategies outlined in the plan, "equity champions" were appointed within each team working on each priority area in the plan.

The first three years of work for Grand Rapids focused on creating structure for the city's equity work, receiving relevant training and technical

assistance from national leaders, internally training and educating department and division managers, and embedding the value of equity into the city's work. Now, the focus of the city is on transforming equity from a value into practice. Recently, the city moved its Office of Diversity and Inclusion to be within the Executive Office, elevating its position within the city structure. The city commission also approved a revised version of Grand Rapids' Human Rights Ordinance in August 2019, which largely focuses on addressing discrimination in the city. In addition, the city has been actively working to incorporate an equity lens into its budgeting process. This work started during the FY2019 budget process when the city used a racial equity tool developed as part of the city's work in the Racial Equity Here initiative. For FY2020, the city intends to integrate equity into the entire budget process.

SAN ANTONIO, TEXAS



OFFICE OF EQUITY:

Works to dismantle systemic racism in government.

CHIEF EQUITY OFFICER: ZAN GIBBS

REFERENCE:

<https://www.sanantonio.gov/Equity>

San Antonio's equity efforts were formally launched in 2015 with the creation of the Office of Diversity

and Inclusion, since rebranded as the Office of Equity. The Office of Equity houses a chief equity officer, currently Zan Gibbs, and three equity managers. Collectively, staff work toward the city's goal of "reduc[ing] and ultimately eliminat[ing] disparities experienced by [the] most marginalized San Antonio residents" (City of San Antonio, 2020).

As a member of the Government Alliance on Race and Equity (GARE) since 2017, San Antonio leads with race. A turning point for San Antonio in understanding racial equity and using an equity lens came in 2017 during the FY2018 budget process. Dr. Christine Brennon, an associate professor in sociology and anthropology at Trinity University, presented to city council on the practice of redlining and its continued effects for communities of color in San Antonio. This information served as the backdrop to the draft budget as city councilmembers considered what it would look like to allocate resources in an equitable manner. Ultimately, the budget was passed, representing the first time San Antonio had used an equity lens to craft its budget. Examples of how equity was used for budgeting include directing funding for street improvements to districts with the poorest conditions and providing funding to improve travel times for those using public transportation who are required to transfer at least twice (Olivo, 2017).

Current priorities of the Office of Equity include implementing a train-the-trainer program, which has already trained over 40 city employees; facilitating the work of a Citywide Equity Committee; supporting city departments in completing equity assessments and developing Equity Action Plans based on their findings; refining the budget equity tool and supporting departments in its use; providing training and technical assistance; and producing data reports, maps, and other tools to assist city staff and external partners in their equity work (City of San Antonio, 2020).

APPENDIX B: Research Design

The purpose of this study is to develop an understanding of the best (and better) practices for implementing an equity lens in local governments. As such, it examines several cases¹¹ of local governments as they implement an equity lens in their day-to-day operations.

The cases were selected ‘opportunistically.’ The primary criteria for inclusion in the study, were 1) that the jurisdiction had begun to advance an equity lens in its operations, and 2) it was willing to participate in the focus groups and interviews that defined the study. Given the variation across the cases, direct comparisons between the cases were not made.

The primary source of data collection was a series of focus group sessions and individual interviews (comprised of managers and administrators who employ social equity measures in their programmatic responsibilities). Within each jurisdiction, a series

of 1-4 focus group sessions were conducted. Each focus group included 3-5 participants and, where possible, were organized around two different categories—programmatic area (e.g., housing or parks and recreation), and level of administrative responsibility (e.g., city manager’s office). Most of the focus group sessions were run as active webinars, though in some instances they were conducted in person. Participants were recruited based on their engagement with equity efforts underway within their city. Participation was voluntary.

Additionally, interviews were conducted with representatives of national organizations that support local government equity efforts¹² and jurisdictions that are pursuing equity but are not characterized by manager forms of government.¹³

Both the focus group and interview data were analyzed for thematic consistency using pattern-sensing software (NVivo).

¹¹ Alexandria, VA, Austin TX, Boulder, CO, Dallas, TX, Fort Collins, CO, Grand Rapids, MI and San Antonio, TX

¹² Government Alliance for Racial Equity and the Rockefeller Foundation – Resilient Cities

¹³ King County, WA, Louisville, KY, and Seattle, WA

APPENDIX C: Focus Groups/Interview Instrument

Discussion Prompt #1 (Vision): Imagine a “fully mature” social/racial equity program, what does that look like? That is, what elements need to be a part of a social/racial equity program (e.g., strategic plan, a separate department or office, etc.) and who needs to be involved and how are these things related?

Additional issues to consider

1. What role would performance measurement play?
2. How close is your jurisdiction to having a “fully mature” program?
3. What challenges have you had to overcome or that you need to overcome to become a fully mature program?
4. What has helped along the way (e.g., right partnerships, adequately resourced, political will, etc.) or what do you think is working well?

Discussion Prompt #2 (Use of Performance Measurement): How do you go about translating the idea of equity into a measurement? What is the process? And who is involved?

Additional issues to consider

1. Once developed, how are the data used? Can you give me an example of where and how the data is used? How are the data typically received (Do people believe or refute them? Do they use them or even look at them?)?
2. Can you give me an example of where the data is not being used, but you think it should be?
 - a. What needs to be overcome to have the data more fully employed?

Discussion Prompt #3 (Leadership and Management): From what we have come to understand, leadership is a vital component for the development and implementation of social equity programs. It also seems that leadership in this area needs to exist at multiple levels within and outside the organization. In your particular jurisdiction, where has the leadership on social/racial equity emerged?

Additional issues to consider

1. If we focus on the development of equity performance measures, what role have these leaders played in creating and advancing the equity programs?
2. If we focus on the use of equity performance measures, what role have these leaders played in creating and advancing the equity programs?

Discussion Prompt #4 (Field of Practice): If you can, “step back” from your particular organization and think a little about “lessons for the field.” What advice do you think you can offer to other jurisdictions?

Additional issues to consider

1. If you had to set out some “standards for practice” or for the “equity profession,” what might they be?
2. How do you think practitioners can do a better job of “sharing information?”
3. What sorts of support would you like to see for developing these types of programs?

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