Strategic Planning Equity Lens

Based on a suggestion by Dr. Charlotte Goodluck, the Project Support Team has created an Equity Lens through which we may review both the strategic planning process and its eventual outputs. In order to design our lens using the best and most current thinking on the subject, we have enlisted the help of a small group of experts from within the PSU community and other regional experts. This advisory group includes Ann Curry-Stevens, Ashley Horne, Carlos Crespo, Chas Lopez, Cornel Pewewardy, Steve Percy, Veronica Dujon, Yves Labissiere, Ann Marie Fallon, and Sonali Balajee.

In building a review process, this group—or some subset thereof—will serve as an Advisory Panel that will review the answers to our Equity Lens questions around race/ethnicity, and will suggest revisions or actions for improvement. An additional Advisory Panel will be formed to perform the same task to address additional marginalized communities including (but not limited to) persons with disabilities, women, transgender and gender non-conforming persons, and those in the LGBTQ community.

What follows is the set of equity questions that we propose be asked of the plan and the process. While we understand that simply answering these questions may be insufficient to address actual inequities, their challenging nature should shape thinking and planning in a positive direction, and will result in a plan that is more balanced than it would have been otherwise.

It will be important to track the equity outcomes of this plan—that is, to measure the actual impacts in terms of student, faculty and community outcomes, as well as smaller but still significant domains such as changes in behavior, attitude, capacity-building, resource allocation, and decision-making. Because the work of the Strategic Plan Development Team will be completed and the team will be dissolved, it will be important that the Topic Team on Equity, Opportunity, and Access recommend a mechanism by which these outcomes can be measured on an ongoing basis, so that the resulting data may be used for future iterations of PSU’s strategic plan.

This approach borrows heavily from the Multnomah County Equity and Empowerment Lens, and from the Protocol for Culturally Responsive Organizations by Ann Curry-Stevens, Marie-Elena Reyes & the Coalition of Communities of Color.
Foci of the Lenses
We have identified the importance of implementing a set of Equity Lens questions asked about race/ethnicity separately from the questions asked about other groups that may be affected, including non-dominant gender identities, LGBTQ status, and people with disabilities. While the same questions will be asked for each grouping, the separation of the answers will allow our two advisory panels to apply their specific expertise to the answers, allowing for a more thorough and thoughtful process:

› Race/ethnicity
› Women, transgender and gender non-conforming persons, those in the LGBTQ community, persons with disabilities, and other marginalized communities that the team identifies as significant

Guiding Principles
This Equity Len supports attending to equity issues throughout the work of Strategic Planning. It will also infuse the processes selected for operationalizing our work sessions, and the substantive areas being focused on in each team’s work—including those elements not included in the work. We also recognize that equity is a larger societal construct (alongside inequity), and that prevailing disparities in issues such as education, income, employment, occupation and health have traditionally been reinforced by institutions of higher education.

In accordance with these challenges, we have designed a set of required questions that each formal working unit of Strategic Planning will need to answer.

We begin with a set of guiding principles that we ask each team to adhere to:

- PSU has a commitment to narrow racial disparities in society, and advance social justice
- At PSU, equity is given the same emphasis as other university priorities
- PSU is committed to ensuring that its Strategic Plan reflects the interests of those most affected by our decisions: our students, their future employers, and the service users, customers and/or communities they will ultimately serve
- PSU is cautious of making decisions on behalf of marginalized communities and aims to directly include these communities and their advocates wherever practical. Decisions to not include these stakeholders need to be justified
- PSU aims to create a strategic plan, and the processes that lead up to it, that maximizes the benefits for communities of color and for other marginalized communities
Equity Lens for the Project Support Team

The purpose of the Equity Lens for the Project Support Team is to ensure that the process of strategic planning is deliberately inclusive and that process decisions are evaluated to identify where there are opportunities for greater empowerment, and also to identify when the process has failed to live up to the promise of equity.

The Equity Lens for the Project Support Team questions will be answered by the Project Support Team—once at the mid-point of the process, and again near the end of the process. These questions will be asked twice: first considering race/ethnicity, then a second time for all other groups, including those with non-dominant gender identities (women, transgender and gender non-conforming people), LGBTQ status, and people with disabilities, plus additional marginalized communities the Team sees as important to address. The answers to these questions will be reviewed by each of the Advisory Panels, and suggestions for improvement or mitigation will be returned.

People

- How have we adequately ensured that our operational processes are inclusive, and that the elements of the process have not created barriers to meaningful participation?
- Which stakeholder groups would we like to have included but were unable to facilitate?

Place

- On the basis of PSU’s social, physical and cultural location, how does this process compensate for access limitations of various stakeholder groups?
- How have we modified our process to support access by marginalized community stakeholders?

Process

- How are our processes supporting the empowerment of communities historically most affected by inequities?
- How are processes ensuring that participants’ emotional and physical safety needs are addressed?
- How are processes supporting participants’ need to be productive and feel valued?
- How are our process building ongoing community capacity for involvement with PSU (beyond the strategic planning process) by those communities historically most affected by inequities?
- How are we using this opportunity to contribute to the leadership development of those from marginalized communities?
- What types of biases have influenced the work of the groups and how have these been identified and addressed?
- What improvements to team processes can you support for naming and identifying unaddressed bias?
• What have we learned about effective empowerment practice that we recommend being continued by PSU in other program and initiative development processes?
• What recommendations do we suggest for the future work of PSU?

Equity Lens for the Topic Teams & SPDT

The purpose of the Equity Lens for the Topic Teams & SPDT is to ensure that each specific element of the plan (such as vision and mission) and each initiative proposed intentionally creates a future for PSU that advances equity for historically marginalized groups.

The Equity Lens for the Topic Teams & SPDT questions will be answered by the working groups who formulate each part of the plan. In some cases, this will be the entire SPDT, in other cases it may be a small working group. Each of the Topic Teams will also be asked to answer these lens questions. Like the Process questions, these questions will be asked twice: first considering race/ethnicity, then a second time for all other groups, including gender identity, LGBTQ, and people with disabilities. The answers to these questions will be reviewed by the respective Advisory Panels, and suggestions for improvement or mitigation will be returned.

People
• Who is affected—positively, negatively, or not at all—by the elements of this part of the strategic plan and what are the specific advantages and/or barriers to each group?
• How have we considered environmental justice in this (initiative/plan element)—that is, how will these initiatives support the rights of all people to live in a healthy environment?

Process
• How does this (initiative/plan element) foster the development of processes that address barriers to inclusion and contribute to the development of community capacity?

Power

The Equity, Opportunity and Access team needs to consider which demographic groups have the greatest need for greater inclusion and which steps PSU as a whole should take to mitigate these needs. Each Topic Team will also be asked to answer these questions, tied to each initiative proposed:

• How will this (initiative/plan element) support the empowerment of people from historically marginalized communities?
• What are the specific ways that this (initiative/plan element) is expected to reduce disparities and advance social justice?
Implementation/Documentation

1. Decisions made during the planning process will be by a general consensus model, with opportunities for dissenting opinions to also become part of the plan.
2. Efforts are expected to equalize participation of those at the table.
3. Efforts are expected to ensure voices of stakeholders not at the table are gathered and that these perspectives have influence in the process.
4. Two Equity Advisory Panels (as described at the beginning of this document) will assist the Project Support Team in vetting the Equity Lens process, and in ensuring that it is adequately applied to both the process and the resulting plan.
5. The answers to all Equity Lens questions will be included as part of the strategic plan documentation. The Advisory Panels will review portions of the plan as they are completed, and will provide guidance as to whether the Equity Lens has been adequately applied. In some cases, this may necessitate outreach to an affected community to ensure that the community’s concerns are addressed.
6. When the answers to the questions highlight an inequity that may result from the implementation of that portion of the plan, the team working on that portion will be asked to provide mitigation measures, which will also be included in the plan documentation.
7. To the degree that results may fall short, minority reports will serve as a complaint process to highlight where the plan or the process has not lived up to the ideal, and may make recommendations for future processes or initiatives.

Definitions

**Equity:** “Equity is when everyone has access to opportunities necessary to satisfy essential needs, advance their well-being, and achieve their full potential. We have a shared fate—as individuals within a community and communities within society. All communities need the ability to shape their own present and future. Equity is both the means to healthy communities and an end that benefits us all.”

**Empowerment:** Is both a process and an outcome that builds the power of individuals, groups and/or communities to influence the outcomes they desire. It is typically applied to the context of marginalized communities increasing their ability to improve their wellbeing by reducing forms of oppression that cause and sustain their marginalization.

**Environmental Justice:** Is “the fair treatment and meaningful involvement of all people regardless of race, color, national origin, or income with respect to the development, implementation, and enforcement of environmental laws, regulations, and policies... It will be achieved when everyone enjoys the same degree of protection from environmental and health hazards and equal access to the decision-making process to have a healthy environment in which to live, learn, and work.”
**Gender non-conforming persons:** Those whose behavior and appearance are not aligned with society’s expectations for one’s gender.

**LGBTQ:** Lesbian, gay, bisexual, transgender and queer. Please know that queer is a term used by those in the community to self-define; it is not acceptable for those not in the community to use the term.

**Communities of color:** Communities of color are identity-based communities that hold a primary racial identity that describes shared racial characteristics among community members. The term aims to define a characteristic of the community that its members share (such as being African American) that supports self-definition by community members, and that typically denotes a shared history and current/historic experiences of racism. An older term for communities of color is that of “minority communities” which is increasingly inaccurate given that people of color are majority identities on a global level. That term has also been rejected for its potential to infer any inferior characteristics. The community may or may not also be a geographic community. Given that race is a socially-defined construct, the definitions of these communities are dynamic and evolve across time. At present, in Multnomah County, the Coalition of Communities of Color defines communities of color to include Native Americans, Latinos, Asian and Pacific Islanders, African Americans, Africans, Middle Eastern, and Slavic communities.\(^1\)

**Community wellbeing:** Is defined as the conditions that support self-determination, wellness, justice and prosperity.\(^4\) It often has a larger set of domains that include physical, social, environmental, economic and psychological elements, with the specifics recommended to be set by the community itself.

**Community capacity:** Is “the combined influence of a community’s commitment, resources, and skills that can be deployed to build on community strengths and address community problems and opportunities.”\(^5\)

**Marginalized communities:** A community (defined in this instance as an identity-based community) that is marginalized by systems, practices, behaviors and discourses of domination that preserve the current social order. These communities include persons of color, low income persons, women, transgender and gender non-conforming people, LGBTQ persons, people with disabilities, non-Christian persons, and the elderly. Additional such communities may be added to this list.

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1. Portland City Council’s definition of equity, adopted in 2011.