

# Equity

---

RAPID RECOVERY  
PROGRAM TOOLKIT

**This toolkit has been made possible through technical assistance provided by the Baker-Polito Administration's Local Rapid Recovery Planning program.**



The Local Rapid Recovery Planning (RRP) program is a key part of the Baker-Polito Administration's Partnerships for Recovery Plan, the strategy established to help communities stabilize and grow the Massachusetts economy as a result of the economic impacts brought on by COVID-19. The plan invests \$774 million in efforts to get people back to work, support small businesses, foster innovation, revitalize downtowns, and keep people in stable housing.

In addition to the planning program, recovery efforts include a Small Business Relief Program administered by the Massachusetts Growth Capital Corporation. This program, which concluded in May 2021, provided more than \$687.2 million to over 15,000 businesses across the Commonwealth, with a focus on businesses located in Gateway Cities, among demographic priorities, or operating in sectors most impacted by the pandemic. Cities, towns, and non-profit entities are using Regional Pilot Project Grant Program funding for recovery solutions that seek to activate vacant storefronts, support regional supply chain resiliency, and create small business support networks. To promote recovery in the tourism industry and support the ongoing My Local MA marketing initiative encouraging residents to support their local economies by shopping, dining and staying local, another \$1.6 million in grants were awarded through the new Travel and Tourism Recovery Grant Pilot Program. Through April 2021, MassDOT's Shared Streets and Spaces Grant Program has invested \$26.4 million in municipal Shared Streets projects to support public health, safe mobility, and renewed commerce.

In support of the overall recovery strategy, the Administration made \$9.5 million in awards for 125 communities to create Local Rapid Recovery Plans, through the MA Downtown Initiative Program. These plans address the impacts of COVID-19 on local downtowns and small businesses by partnering with Plan Facilitators and Subject Matter Experts to pursue locally-driven, actionable strategies.

**For more information, contact DHCD:**  
**100 Cambridge St, Suite 300**  
**Boston, MA 02114**  
**617-573-1100**  
**mass.gov/DHCD**

**Toolkit prepared by:**



**Dr. Lomax R. Campbell**  
**President and CEO**

**Acknowledgements:**



**Eboni W. Henderson, MS, CPC**  
**Owner and CSO**



**Luticha André Doucette**  
**CEO and Founder**

---

# Table of Contents

<b>Why This Toolkit?</b>	<b>Page 4</b>
The Case for Equity and Inclusion	Page 5
<b>Getting Started</b>	<b>Page 8</b>
How to use this toolkit	Page 9
Toolkit Checklist	Page 9
<b>Getting It Done</b>	<b>Page 11</b>
We want to perform an environmental scan to identify the critical issues and challenges operating within the community and organizational environment	Page 12
We want to prioritize key risks and challenges and determine the organizational why-factor	Page 16
We want to segment the community by identifiable factors or attributes relevant to community members	Page 18
We want to frame and prioritize issues by segments and groups to clarify where to focus strategies and resources	Page 19
We want to lay the foundation by setting the boundaries for a community-wide transformation agenda	Page 21

---

# Table of Contents

We want to pursue a targeted learning and development strategy to gain culturally-specific insight on segments of focus	Page 24
We want to focus on establishing common ground to build authentic, lasting mutually-beneficial relationships	Page 25
We want to work with the community to establish performance and accountability measures	Page 27
<b>How Others Are Doing It</b>	<b>Page 29</b>
Lessons on Paradigm Shift	Page 30
Lessons on Fundraising	Page 30
Lessons on Policy Change	Page 31
<b>Overcoming Challenges</b>	<b>Page 37</b>
Possible Equity Issues by RRP Category	Page 39
<b>Key Resources</b>	<b>Page 41</b>
Strategic Plan Template	Page 42
Notes	Page 43
<b>References</b>	<b>Page 46</b>

---

# Why This Toolkit?

---

# The Case for Equity and Inclusion

## *Why our growing diversity creates “cultural gaps”*

Since its inception, the United States has always been a wildly heterogeneous nation that its founders and subsequently civic and institutional leaders have sought to unify through the promotion of the American Identity (e.g., rugged individualism, liberalism, egalitarianism, and hard-work, framing American exceptionalism). This collective identity or macroculture has been carefully and intentionally crafted over more than two and a half centuries. America's well-known values, beliefs, and reinforcing myths contain the subtle cultural contents socialized through various avenues that have suppressed the acknowledgement of its cultural diversity. Critical avenues have included education, entertainment and media, government legislation, and various facets of organizational life across all sectors. Termed **Eurocentric monoculturalism** by Derald Wing

Sue (2015), renowned Columbia University counseling psychology professor, this insidious aspect of America's history has contributed to what Sue calls the “conspiracy of silence” maintained among Euro-Americans. Since the passing of the landmark Civil Rights Act of 1964, America has wrestled with making the shift of recognizing and responding to its ever-evolving multicultural communities' needs. For the purposes of this toolkit, the term multiculturalism refers to the recognition and appreciation of America's multiethnic, pluralistic, and linguistically diverse reality (Nichols, Personal Communication, March 1, 2018).



“America has wrestled with making the shift of recognizing and responding to its ever-evolving multicultural communities' needs”

Leading scholars and practitioners in the areas of organizational culture and leadership have formalized multiple levels of culture that are increasingly less observable and measurable. These include behaviors and practices, artifacts, values and norms, and basic underlying patterns of assumptions. Edgar H. Schein (2016), a renowned Massachusetts Institute of Technology management professor emeritus, refers to underlying assumptions—the most subtle level—as the “Cultural DNA” or the underlying psychology of organizations that have developed over time as they struggle to adapt to their external environment while also wrestling with organizing their internal environment. Culture is the property of groups thus making most organizations patchworks of cultures, subcultures, and countercultures, within national macrocultures. Just like organizations have cultures, community groups have their own cultures reflecting all of the levels and facets previously described. When these are misaligned, we call those systemic incongruences **“cultural gaps”** and when aligned culturally congruent organizations.

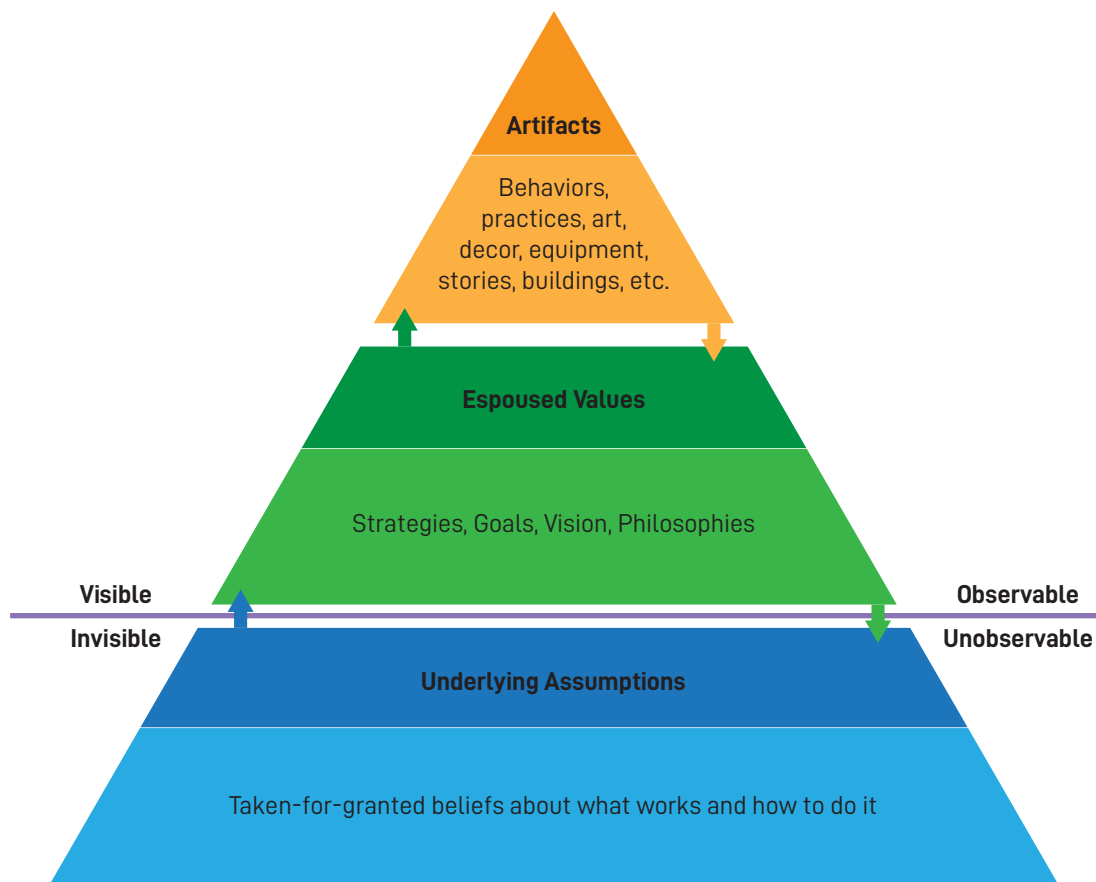


Figure 1. Schein's Levels of Organizational Culture

The **tensions** associated with our nation shifting from monocultural to multicultural has led to the expansion of incongruencies or gaps between the cultures of mainstream organizations and the diverse communities they employ and serve that have challenged their effectiveness in all fields of human endeavor. It is imperative to understand the community, structural, and systemic impacts of cultural gaps in public and non-profit sector work, especially when they remain unaddressed (refer to Table 1 below). To advance truly equitable and inclusive economic development, users must focus on first becoming cognizant of existing gaps within their contexts. They can leverage progressive approaches to organizational learning to build cultural competence with the prospect of becoming culturally congruent.

Addressing Cultural Gaps	Potential Organizational Outcomes
When it's done wrong internally...	Employee burnout, low adoption and participation rates, employee dissatisfaction, absenteeism, high turnover rates, sabotage, empire building, operational inefficiencies, poor performance, program obsolescence, furloughs and downsizing, bankruptcy, lack of creativity and innovation

Addressing Cultural Gaps	Potential Organizational Outcomes
When it's done wrong externally...	Corroding reputations, low adoption and participation rates for programs and resources, client dissatisfaction, distancing or disassociation, structural barriers, and perceived exclusion as consequences of the community lacking a sense of belongingness or "seeing itself" as part of public sector efforts

*Table 1. Negative Effects of Cultural Gaps Unaddressed or Improperly Addressed*

Before proceeding, it will be imperative for users and their organizations to adopt a set of **operating principles** to ensure corresponding activities center all relevant or critical stakeholder groups rather than its own interests. Borrowing from our friends at Forward Cities and the People's Institute for Survival and Beyond, users are expected to "A.B.I.D.E. by Anti-Racist Principles." These unifying concepts will be briefly explained. The acronym A.B.I.D.E. is an abbreviation of Access, Belonging, Inclusion, Diversity, and Equity. It expands upon the popular D.E.I. acronym to recognize the importance of creating a culture of access in consideration of individuals with disabilities and others with lower socioeconomic statuses. It also acknowledges the need for inspiring a sense of belonging for all internal and external stakeholders. The People's Institute's anti-racist principles have been refined over more than four decades and their signature workshop, Undoing Racism®, has been validated through more than 30 articles and texts as an effective means for instilling the principles. They include analyzing power, developing leadership, reshaping gatekeeping, identifying and analyzing manifestations of racism, learning from history, maintaining accountability, sharing culture, undoing internalized racial oppression, and ultimately working to undo the various manifestations of racism—especially structural and systemic. This work is about movement thinking rather than moment thinking. It requires users to remain strategically focused on the 'big picture' while executing the tactical actions that follow. By adopting these or similar principles, institutions can partner with their communities in culturally appropriate ways to co-create a sustainable transformation agenda.



---

# Getting Started

# Getting Started

## How to use this toolkit

This equity toolkit has been prepared to introduce users to a general process for engaging in inclusive community-based and entrepreneur-led economic development. Based on anti-racist organizing and community wealth building principles, it was designed to **guide** users' efforts working alongside diverse residential and business communities employing a phased approach. As a guide, it also introduces users to a variety of tools and resources that can be adopted to facilitate actions that engender cross-cultural and multicultural success.

Once users are comfortable with performing the actions that follow, this toolkit can be used as a **reference** for quickly locating desired actions and resources in support of their efforts requiring culturally appropriate and contextually-adapted strategies. Users are also able to list additional resources over time to further customize this toolkit for their unique circumstances and contexts (e.g., community education, business and economic development, strategic planning, community-based participatory research, etc.) using the notes pages.

Lastly, some users will use this toolkit as a **catalyst** for their next change journey as it further clarifies their passions and professional interests. Actions and resources discussed will provide users cursory overviews of project and change management, continuous process improvement, community development, and group facilitation. To further develop these competencies, motivated users may even pursue credentials relevant to their work. The ultimate benefits for individuals, change teams, and organizations include staff enrichment, organizational learning, and effectiveness with critical stakeholder segments.

## Toolkit Checklist

The content contained in this equity toolkit is organized into a series of actions and steps that are separated into **four phases**: Define, clarify, engage, measure. Together they reflect a process for embedding equity and inclusion into transformational community-based economic development work. Each action is suggestive and provides an overview before introducing high-level steps and resources for consideration for practice. These are not intended to be rigid linear courses of action or prescriptive universal tools. Rather, they aim to illuminate the possibilities, providing a framework for collaborative action-planning.

---

**Diagram: Toolkit Checklist**

Action	Page
<u>Phase I: Define</u>	
<input type="checkbox"/> We want to perform an environmental scan to identify the critical issues and challenges operating within the community and organizational environment	12
<input type="checkbox"/> We want to prioritize key risks and challenges and determine the organizational why-factor	16
<u>Phase II: Clarify</u>	
<input type="checkbox"/> We want to segment the community by identifiable factors or attributes relevant to community members	18
<input type="checkbox"/> We want to frame and prioritize issues by segments and groups to clarify where to focus strategies and resources	19
<input type="checkbox"/> We want to lay the foundation by setting the boundaries for a community-wide transformation agenda	21
<u>Phase III: Engage</u>	
<input type="checkbox"/> We want to pursue a targeted learning and development strategy to gain culturally-specific insight on segments of focus	24
<input type="checkbox"/> We want to focus on establishing common ground to build authentic, lasting mutually-beneficial relationships	25
<u>Phase IV: Measure</u>	
<input type="checkbox"/> We want to work with the community to establish performance and accountability measures	27

---

# Getting It Done

# Getting It Done

We want to perform an environmental scan to identify the critical issues and challenges operating within the community and organizational environment

*Guiding Question: What's going on in the world around us?*

To get going, it will be essential to identify the critical issues or challenges operating within the organizational environment before developing a transformation agenda with the community. Environmental scanning is an approach derived from military science and popularized between the 1960s and '70s. Occasionally referred to as futures scanning and early warning systems, scanning has always been used to distill diverse findings into reports to inform future-oriented decision-making activities. It is common practice to conduct a scan as the precursor to a strategic planning cycle or to initiate research and development activities for products, services, programs, and initiatives. There are numerous approaches that can be used. A few alternatives will be described below.

## Step 1: Set the Purpose and Objectives

It is important for a consensus to be reached among decision-makers regarding what might be motivating the need for action, particularly, performing an environmental scan. For example, is the individual, group, or organization conducting an initial or routine scan for strategic planning purposes? Are they engaged in activities centered around developing new offerings? Do they need to ensure they are not duplicating resources that already exist in the community or efforts already underway? Will the scan inform the development of partnerships with other organizations? Or will the scan be deployed to equip the organization with strategies for responding to a crisis? Based on these answers, it will be essential to prepare a purpose statement with relevant goals and objectives articulating the business case for taking action. These items can be documented and approved using a project charter.

## Step 2: Determine the Scanning Method

Porter's Five Forces framework (Figure 2), developed by economist and management strategy professor Michael E. Porter, provides a structured way to examine the primary forces impacting organizations and their publics. Critical activities include identifying competitors for benchmarking various outputs (e.g., websites, collateral, staffing structure, etc.), and ensuring a sufficient number of suppliers and service providers are available to affordably support resource needs and essential activities. Similarly,

assessing the extent to which communities served are required or expected to participate in the organization's offerings and processes is also essential. For example, businesses that require permits or licensure for formal operation are at the mercy of government, while businesses seeking capital can work with any institution offering financial assistance programs. Being aware of alternative courses of action community stakeholders can take, that may impact an organization's relevance or ability to serve their critical stakeholders, is another aspect of the scanning effort. Finally, ensuring sufficient barriers are in place to safeguard the organization's interests and position in serving their publics. Having the financial resources and dedicated staff trained in utilizing specialized information systems for obtaining location-based intelligence is an example of this final force in action.



Figure 2. Porter's Five Forces Framework

---

To supplement Porter's framework, a factor-based assessment is also recommended. This step will provide a more holistic way to explore the relevant social, cultural, legal, technological, and economic factors impacting organizational performance. They should be discussed during strategy development and implementation activities. As organizations work to evolve their economies, examining them will unveil the barriers and facilitators of success. Collectively, these forces and factors will shape the attractiveness of a market and the salience of a given course of action.

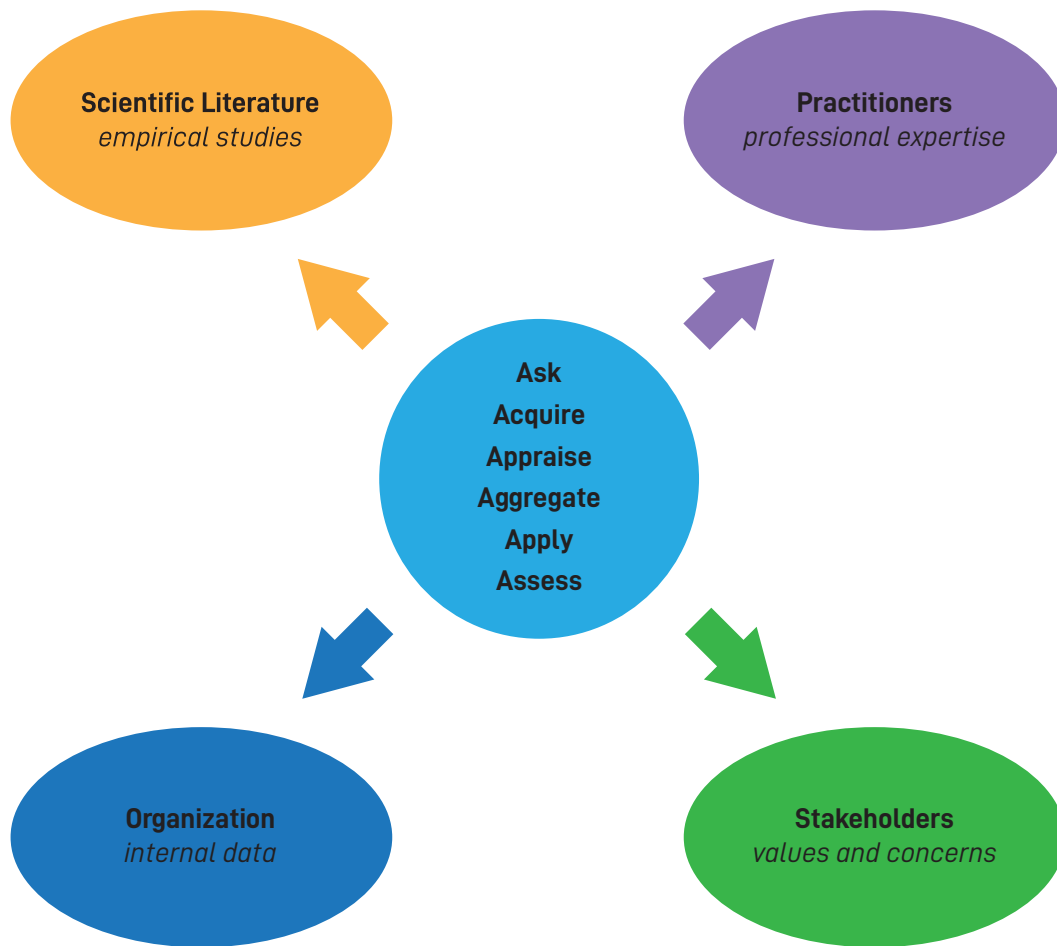


Figure 3. Evidence Based Management Framework

The Center for Evidence Based Management (CEBMa, 2014, p. 7) presents another framework using a six-step process for consulting four distinct sources of evidence conveyed in Figure 3 above. Accordingly, quality decision-making resides at the center of diverse quality sources of evidence. Empirical studies refer to scholarly research commonly published in peer-reviewed journals and conferences, but can also include non-scholarly or gray literature. Professional expertise refers to practitioner and expert judgment. Values and concerns relate to stakeholder preferences, especially those derived from the most salient community segments who are seldom empowered to participate

---

in decision-making activities that affect them. Internal data characterizes performance measures framing the organizational context, actors, and circumstances resulting from the integration and allocation of resources in response to the external environment. Rapid reviews, The Delphi Technique, community-based participatory research, and data-mining, respectively, are exemplary tools and techniques.

### Step 3: Develop the Scanning Plan

According to the Project Management Body of Knowledge, a project is “a temporary endeavor undertaken to create a unique product, service or result” (PMBOK, 2021, p. 245). A well-planned project addresses all management domains including the scope, timeline, cost, quality, staffing, communications and risk, procurement, and stakeholder engagement. Each aspect needs to be fleshed out and integrated into a project management plan in order to increase the likelihood of success. The choice of scanning method, discussed in the prior step, should inform planning activities.

### Step 4: Execute and Manage the Plan

Using the project management plan, users will launch scanning activities either individually or in teams. This step is iterative and will be shaped by organizational resources, the skills of the project team, and any vendors hired to provide assistance. Primary activities include obtaining diverse data and initial insights from key stakeholders and resources engaged in during the process. Managing the scan involves mitigating scope creep, ensuring costs do not exceed budget allotments, and concluding the fact finding mission once a sufficient amount of content has been obtained for each facet of the research program.

### Step 5: Wrap-up the Scanning Effort

Secondary activities will involve organizing and making sense of the items obtained. The categories within the chosen scanning method will be one way to do so. Further organization can occur by sorting and clustering the data for analysis. For example, using Porter's Five Forces framework would call for supplier identification and documenting all relevant details from offerings to pricing and order fulfillment practices for comparison. However, using CEBMa's approach, assessing stakeholder concerns begins with identifying stakeholder groups, describing each, specifying their respective stake in the work, and soliciting their concerns and motivations. This will allow the organization to devise stakeholder-specific engagement strategies.

There are a number of approaches that can be used for analysis and synthesis. A simple approach would be to summarize the contents of each source, explain how they relate to one another and why they matter. Saldaña (2021) provides an essential text for qualitative research methods for those interested in adopting more formal strategies. These insights should be organized into a final report along with a presentation for key decision-makers.



## We want to prioritize key risks and challenges and determine the organizational why-factor

*Guiding Question: What are the critical issues motivating action and why are they important?*

Users will be able to readily identify some risks and issues during the environmental scanning effort. As they emerge, they can be cataloged in a risk register or issue log for later review. Once a sufficient number has been identified, users should discuss why it may be necessary to prioritize some over others. The most common tools for preparing and evaluating risks and issues include brainstorming, affinity diagramming, and risk-probability impact matrices..

Risk Description	Impact Description	Impact Level	Probability Level	Priority Level	Mitigation Strategy	Owner
Summarize the risk in brief	Consequences of the Risk	Rate 1 L - 5 H	Rate 1 L - 5 H	Magnitude of the Risk	What's the plan?	Responsible Personnel
Resource constraints	Can only finish the first phase...	3	3	9	Fundraise more	Kelly
Scandle	Shift attention from the project	2	3	5	Casually Monitor	Jay
Delayed marketing	Low rate of participation	4	5	20	Leverage partners	Tamika
Organizational silos	Bureaucracy will slow things	5	5	25	Start very early	Corinda
Vote was not unanimous	Some not fully on board yet	2	1	2	Proceed with plan	Miguel
Delayed commuting	Construction will slow traffic	3	4	12	Inform the public	Shawn

*Table 2. Sample Risk Register*

### Step 1: Draft running lists of risks and issues

As noted above, some risks and issues will become apparent during the environmental scanning process. However, it may be necessary to use additional avenues for soliciting possible risks and challenges. Options might include hosting brainstorming sessions, asking report and presentation readers for feedback using physical feedback collection boxes or electronic tools such as online

---

forms (e.g., Google, Microsoft, Survey Monkey, etc.). Creative, tech-savvy users might even gamify this step to increase employee engagement.

## Step 2: Organize the Risks and Issues

Once the lists are exhausted, the next step will be to group them based on what they have in common. An overarching label can be applied to each group or cluster indicating the theme or unifying idea used to categorize them. This is also referred to as affinity diagramming. This step makes the lists more manageable.

## Step 3: Assess the Risks and Issues

A risk-probability impact matrix allows users to numerically score the probability and likely impact of individual risks in order to rank or prioritize them. Typically, the scores correspond to colors such as red, yellow, and green to indicate the degree of impact a risk is anticipated to have if it materializes into a full-blown problem or issue. High-level strategies for alleviating risks should be developed, especially for all high (i.e., red) and medium (i.e., yellow) risks. Low (i.e., green) risks may be ignored or addressed in the future. Issues can also be assessed for their impact with high-level response strategies identified.

Likelihood	Consequences				
	Insignificant (1)	Minor (2)	Moderate (3)	Major (4)	Catastrophic (5)
Certain (5) > 90%	High	High	Extreme	Extreme	Extreme
Likely (4) 50% - 90%	Moderate	High	High	Extreme	Extreme
Moderate (3) 10% - 50%	Low	Moderate	High	Extreme	Extreme
Unlikely (2) 3% - 10%	Low	Low	Moderate	High	Extreme
Rare (1) <3%	Low	Low	Low	High	High

Table 3. Risk-Probability Impact Matrix

## Step 4: Determine the why-factor

This final step encourages users to meet with their teams to determine why they might choose to focus on some risks and issues over others. These should be captured in writing and carried forth in future planning and execution activities to clarify and remind everyone of the motivation or purpose for pursuing a given course of action. It can even be conveyed as a formal charge or mission statement.

---

# We want to segment the community by identifiable factors or attributes relevant to community members

*Guiding Questions: Which stakeholder segments or groups should we focus on?*

To jump-start the second phase, it will be imperative to clarify which community groups to focus on. To truly ground the work in users' respective communities, it will be important to refer to stakeholder demographics for the targeted area(s). Which community segments or groups have the least access to resources and growth opportunities? What are their stories? How do they naturally cluster around identities, affinities, and experiences? Some options include racial and ethnic group affiliations in addition to intersecting identity statuses (e.g., age, ability, veteran status, LGBTQ, gender, country of origin, etc.).

## Step 1: Identify and Evaluate Possible Community Segments and groups

Users should develop or refer to available community profiles containing demographic data for their geographies of focus. These reports will provide quantitative details regarding the composition of the community such as the percentage of residents that identify as members of one or more racial and ethnic groups, or the percentage of households living in poverty, without a vehicle, etc. As each segment is identified, it will be important to analyze each according to some criteria. Considerations might include the following:

- A brief description of the segment
- The segment's legitimacy as a stakeholder of the anticipated course of action
- Their interests and motivations related to the anticipated course of action
- Notable challenges and concerns
- Expectations of the organization and its offerings
- Known community capabilities and constraints
- The anticipated impact of proposed courses of action
- Community segments preferred and cultural communication styles
- Possible community-specific engagement strategies

## Step 2: Select Community Segments of Focus

It will be important to establish a set of criteria to determine which community groups to center in the work. These should not merely be based on the size of the segment, but also qualitative dimensions, such as community stories and recent histories in relation to the priority risks and issues previously discussed. Some users will include the potential magnitude of the impact an organization can achieve by working with each community segment or niche.

We want to frame and prioritize issues by segments and groups to clarify where to focus strategies and resources

*Guiding Question: What approaches can we take to gain community perspectives on risks and issues relevant to them?*

Once priority community segments have been determined, it will be vital to begin engaging them going forward. Because community members are the experts of their lived experiences, they should be actively involved with fine tuning the initial set of priorities prepared by the organization based on what is salient to them. They may even identify additional risks and issues worthy of consideration. For example, mitigating institutional barriers to accessing capital may resonate highly with women and minority-owned businesses who struggled with taking advantage of the \$953-billion Paycheck Protection Program loans. Federal lawsuits, policies requiring businesses to have preexisting banking relationships, and the application process presented major structural and systemic barriers.

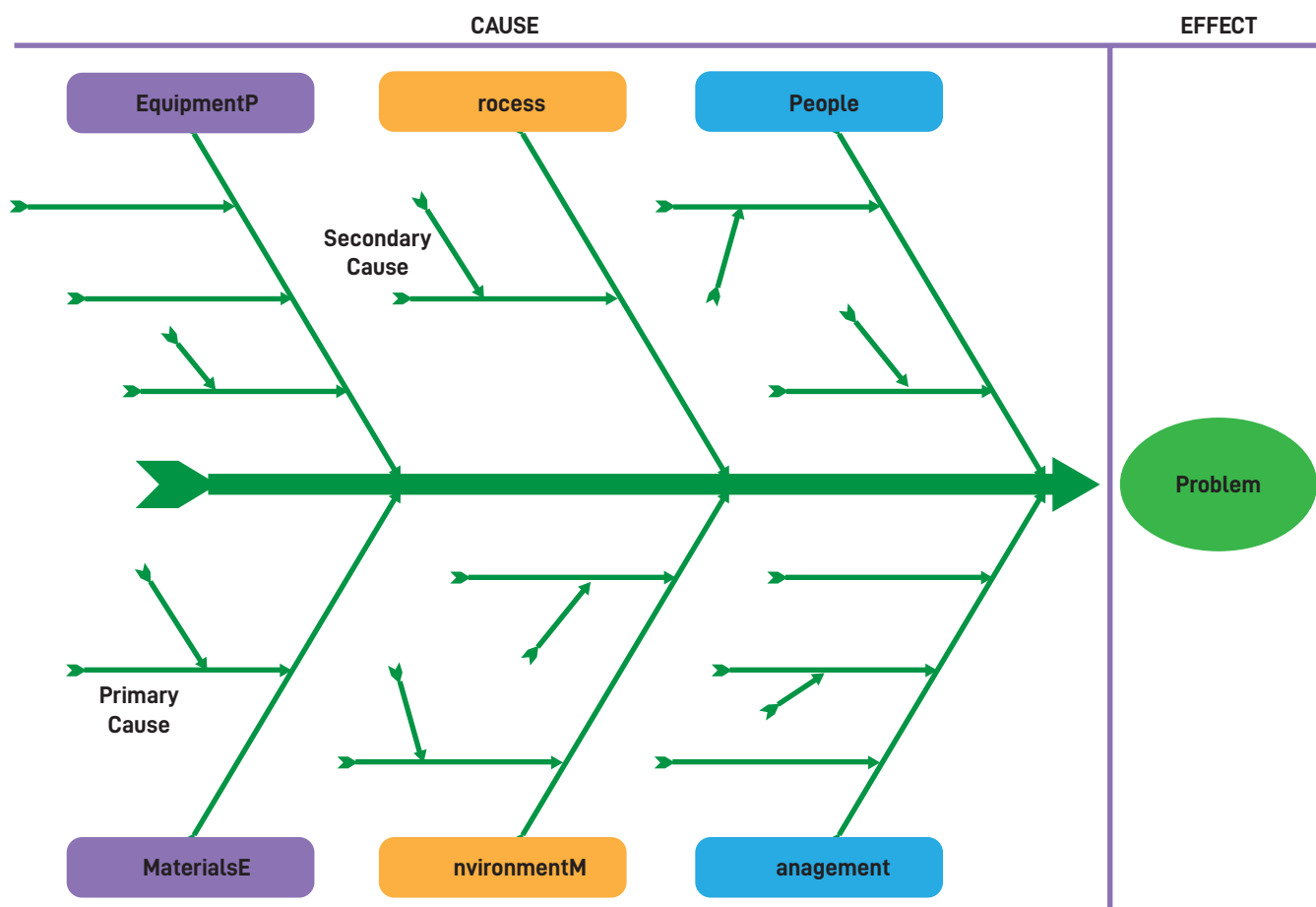


Figure 4. Ishikawa Fishbone Diagram

---

## Step 1: Prepare for Stakeholder Engagement

Fishbone diagramming and the five whys are two root cause analysis techniques that can be used during stakeholder engagement activities. The first one uses a skeletal fish-shaped diagram, where a single problem is listed near its head and explanations are listed at the ends of each bone extending from the central line of the diagram. The explanations can be derived from discussions and various brainstorming techniques, which can then be further processed in groups by asking why existing problems might have occurred to identify possible explanations. Asking up to five rounds of why for each of them will allow participants to screen out unlikely causes and prioritize the root causes before devising remediation strategies. Ranked choice voting is one method that can be used by having participants rank each cause indicating the most important ones to address, focusing on the ones with the highest number of votes. It can also be accomplished with stickers on flipchart or electronically using paid or open source tools.

## Step 2: Convene Community Stakeholders

To align issues by community interests, it will be important to bring selected community groups together to discuss the issues. Options include surveying, workshops and forums, interviews and focus groups, committees, and project teams. Surveys are the most efficient way to solicit feedback from a broad number of constituents, however, low response rates and its impersonal nature makes it challenging to obtain rich, in-depth perspectives. Workshops and forums can be used to bring people together virtually and in-person. They also tend to be more interpersonal than surveys, allowing opportunities for organizations to build connections with participants. They also have other features that allow them to be more effective, such as educational components, the ability to incorporate art and creative problem-solving activities, breakout rooms, refreshments, etc.

## Step 3: Conduct Personal Interviews and Focus Groups

Personal interviews and focus groups are the most time-consuming and expensive ways to engage community members, but they provide the richest forms of feedback among the options described thus far. Users can hire consultants to assist with the development and execution of interview scripts or questions for semi-structured interviews and guided discussions. It is commonplace to provide participants with stipends and light refreshments for their time and contributions. Users will want to obtain written consent from participants, giving them permission to record the sessions, utilizing special facilities for such purposes, and for sharing the insights derived. Transcripts may need to be prepared from the recordings to facilitate analysis. Qualitative data analysis software such as Atlas.ti or NVIVO can be used to analyze audiovisual and text-based content that will be distilled into a final report.

## Step 4: Provide Essential Stakeholders a Seat at the Table

In addition to the engagement strategies above, another option includes forming committees, caucuses, or commissions of selected community stakeholder groups. These affinity-based

---

groups can be provided formal charges and be standing or temporary in nature, depending on the purposes and goals for their formation. These groups are occasionally provided budgets to manage the fulfillment of their work. Lastly, some users will benefit most from having representatives from selected community stakeholder groups serve as members of project teams. This approach can be structured as a fellowship with a stipend or even temporary employment depending on the scope and length of work. While it may require some onboarding and training, this enables the highest level of engagement and literally distributes decision-making authority between the organization and the community. Most successful community-based change efforts will benefit from a combination of the approaches outlined.

## We want to lay the foundation by setting the boundaries for a community-wide transformation agenda

*Guiding Question: How should we collaborate with our critical stakeholders to determine the path forward?*

With the key issues and challenges prioritized by community segment or group, the next action is to collaborate on the creation of the plan. It will be important to take community member skills and abilities into account as the means of collaboration are developed. This will ensure the project team does not create barriers to participation. For example, if digital collaboration tools are adopted, skilled users should be responsible for navigating the technology with less skilled participants being able to view the content on a large screen in order to contribute to the discussion. Alternatively, in the absence of tech-savvy users, low-tech resources can be used and later digitized.

### Step 1: Prepare the Collaboration Space

Determine where collaboration will take place. Users will have the option to continue convening stakeholders in-person (e.g., workshops) or electronically. It will be important to create a central repository accessible to all participants so they can contribute during planned work sessions and whenever they can conveniently contribute to plan creation. There are a number of online document collaboration tools available to enable these activities including Google Drive, Microsoft OneDrive, Zoho Docs, Apple iCloud, Box, and Dropbox. Many of these also feature collaborative whiteboards such as Google Jamboard, Microsoft Whiteboard, Miro Board, Mural, and Zoom Whiteboard. Once the collaboration tools have been selected, account set up and training will be required for all participants.

## Step 2: Co-create the Community Transformation Plan

With all collaboration spaces in place, strategic planning can begin. This is an iterative process that can use many of the methods previously discussed. Key sections of the plan can include a shared vision, mission, values, goals, success factors, performance indicators, and high-level strategies for action. Some additional guidance may be required, especially for participants that do not have experience with planning. The plan should be informed by the reports derived from environmental scanning, preliminary risk and issue assessments, and stakeholder forums used to prioritize challenges.

Using the collaboration spaces from the previous step, there are a number of tools and techniques that can be used to guide this process including strategic plan templates, 5 Bold Steps® Vision Canvas and feedback forms. Once the full plan has been drafted, it may be useful to host a special event to unveil the full plan and garner a broader base of community input. Following the event, the project team should work to develop subordinate action plans for each strategy using the same collaboration methods previously described. Action plans will be needed for every initiative derived from the community road map prepared in the previous section. It will be essential for each plan to address all management domains relevant to each project, program, and initiative.

Action Plan		
No.	Description	Details
1	Activity Name <i>(Title of the project, program, or initiative)</i>	
2	Activity Lead <i>(Assigns responsibility)</i>	
3	Executive Sponsor <i>(Assigns accountability)</i>	
4	Problem Statement <i>(Describes the motivation of action)</i>	
5	Opportunity Statement <i>(Describes the solution and benefits)</i>	
6	Activity Scope <i>(Establishes boundaries)</i>	In-Scope: Out-of-Scope:
7	Strategic Alignment <i>(Ensures "fit" with priorities)</i>	[ ] Pillar/Direction/Goal [ ] Pillar/Direction/Goal [ ] Pillar/Direction/Goal [ ] Pillar/Direction/Goal
8	Activity Objectives <i>(Sets targets to be accomplished)</i>	<ul style="list-style-type: none"><li>•</li><li>•</li><li>•</li></ul>
9	Tactics <i>(Actions for accomplishing identified Activity Objectives)</i>	<ul style="list-style-type: none"><li>•</li><li>•</li><li>•</li></ul>

Action Plan		
No.	Description	Details
10	Timeline <i>(Start/end dates; add a Gantt Chart)</i>	
11	Budget: <i>(Provides general/itemized costs)</i>	
12	Performance Indicators <i>(Establishes success parameters)</i>	Metric: Measure:  Metric: Measure:  Metric: Measure:
13	Allies <i>(Those who can help with this effort)</i>	
14	Obstacles <i>(Perceived/anticipated challenges)</i>	
15	Activity Considerations <i>(Activity-dependent to keep in mind to ensure success of the effort)</i>	Sensitivities: Standards: Requirements:
16	Stakeholder Considerations <i>(Context-dependent to keep in mind to ensure success of the effort)</i>	Critical Stakeholders: Sensitivities: Standards: Requirements:  Non-Critical Stakeholders: Sensitivities: Standards: Requirements:
17	Resources Considerations <i>(e.g., Knowledge, Skills, and Abilities)</i>	People: KSAs: Financial:
18	Communications Strategy <i>(Refer to the Communications Master Plan)</i>	
19	Risk Management Strategy <i>(Refer to the Risk Master Plan)</i>	
20	Additional Comments	

Table 4. Action Plan Template



---

We want to pursue a targeted learning and development strategy to gain culturally-specific insight on segments of focus

*Guiding Question: How can we formalize learning to guide the evolution of our organizational culture as we advance a transformation agenda?*

Identifying and aligning with stakeholder needs is an ongoing process that requires organizations to really get to know their communities in order to remain relevant and viable. Such a learning and development agenda centers the pursuit of cultural knowledge and experiences that increases cultural awareness and sensitivity. It is important for these insights to be normalized within the organization, diffused across functional areas, and embedded into strategic and tactical dimensions.

## Step 1: Establish the Learning and Development Tools

It will be important to center learning throughout the entire change program. This will require users to determine where to document culturally- and contextually relevant insights and lessons learned throughout the process. Simple options may involve developing spreadsheets and documents, whereas more sophisticated options can involve the use of a customer relationship management system.



“Identifying and aligning with stakeholder needs is an ongoing process that requires organizations to really get to know their communities...”

## Step 2: Create Culturally-specific Learning Opportunities to Increase Cultural Knowledge

Learning will occur in both structured and unstructured ways across formal and informal environments. Memoing is one method for documenting unexpected experiences as they occur. It will be important to foster informal opportunities for learning to take place such as social events and activities that allow organizational representatives to do outreach and spend time with the community. It will also be important for the organization to engage with a variety of curated resources (e.g., books, multimedia, etc.) and location-based intelligence from vendors such as Claritas, Social Explorer, and ESRI.

---

## Step 3: Execute the Plan with Stakeholders

As implementation activities progress, it will be important to refer back to the plan and check in with community stakeholders throughout the effort. This will create opportunities for course correction and allow the project team to ensure the project stays on budget, within scope, on time, and meets stakeholder expectations.

We want to focus on establishing common ground to build authentic, lasting mutually-beneficial relationships

*Guiding Questions: How can we demonstrate the vested interest our organization has taken in our critical stakeholders within and outside of the organization?*

As organizations pursue learning opportunities, they will begin to notice commonalities between their cultures and those of the community. These personal experiences will form the basis of trust and relationship building. Building and maintaining common ground should be ongoing through a variety of avenues including immersive experiences such as border crossings, cultural excursions, and service projects. But, it can also occur through more simple exchanges like check-ins, creative expression, and healing circles. Finally, these activities can be internally focused on improving relationships among employees or externally focused on such stakeholders as organizational partners and funders, or residential and business communities.

## Step 1: Use insights from learning and development activities to foster relationship strategies

Relationship building should be an intentional undertaking of organizations engaging in community-based economic development as relationships are the cornerstone of being "community-based." Most cultural communities expect to cultivate authentic connections when they begin working with public and nonprofit sector professionals. To that end, the intent to establish a healthy working relationship should be made explicit. Personal and professional lines become blurred as organizational representatives request personal information from community members.

Information requests run the gamut from copies of tax returns and bank statements to marital statuses and the number of people within the household in order to determine whether they qualify for programs and resources provided by the organization. Oftentimes, they are also a condition for maintaining access to them. It is only fair for community members to expect to get to know and rely on the people assisting them, so relationships are not perceived as extractive—which can be traumatic

---

for some—and to maintain accountability. As users become familiar with community members, it will be important to document and honor their preferences. This can encompass simply engaging in small talk at the beginning of phone conversations and meetings, or sending texts to inform community members that files have been emailed to them. It also includes showing up and actively participating in relevant cultural community events.

## Step 2: Map the relationship building strategies to the levels of culture framework

As relationship-building strategies organically develop, it will be important to reflect upon where they align within Schein's three-tiered culture framework relative to the culture of the priority community segment. Strategies that only exist at the level of values and beliefs espoused by the administration and frontline staff may be seen as inauthentic and surface-level if they are inconsistent with the behaviors and practices or artifacts observed, and vice versa. During interactions with the community, it will be productive to unearth the underlying assumptions from which each community group operates, while reflecting on those of the organization. This exercise will allow organizations to be proactive in how they work to evolve to maintain systemic congruence with the community. It does not happen overnight, but over time.

## Step 3: Create opportunities for building and maintaining relationships with critical stakeholders

Informal and formal opportunities will be necessary for engaging with community members. Culture sharing is an informal alternative adopted from the People's Institute for Survival and Beyond that involves people sharing something about themselves, family, or culture that "gives them life" or brings them joy. It can be a song, dance, story, a family heirloom, food, or even a memory that allows them to share a part of themselves so others can appreciate them and their humanity. Art and creative expression are traditional forms of culture sharing and conversation starters that can enrich meetings, events, and other activities. More formal options include team building and healing circles that incorporate cultural dynamics to bring teams and groups closer together. There are a number of programs and resources available for consideration. The immersive activities identified above allow participants to gain first-hand experience with other cultures. Temporary cultural Islands are another tool that encourage introspection and free flowing dialogue. They can be used to foster multicultural exploration in casual settings away from organizational assumptions, unspoken social rules, and structural hierarchies. Done effectively, they aid in the evolution of an organization's culture.

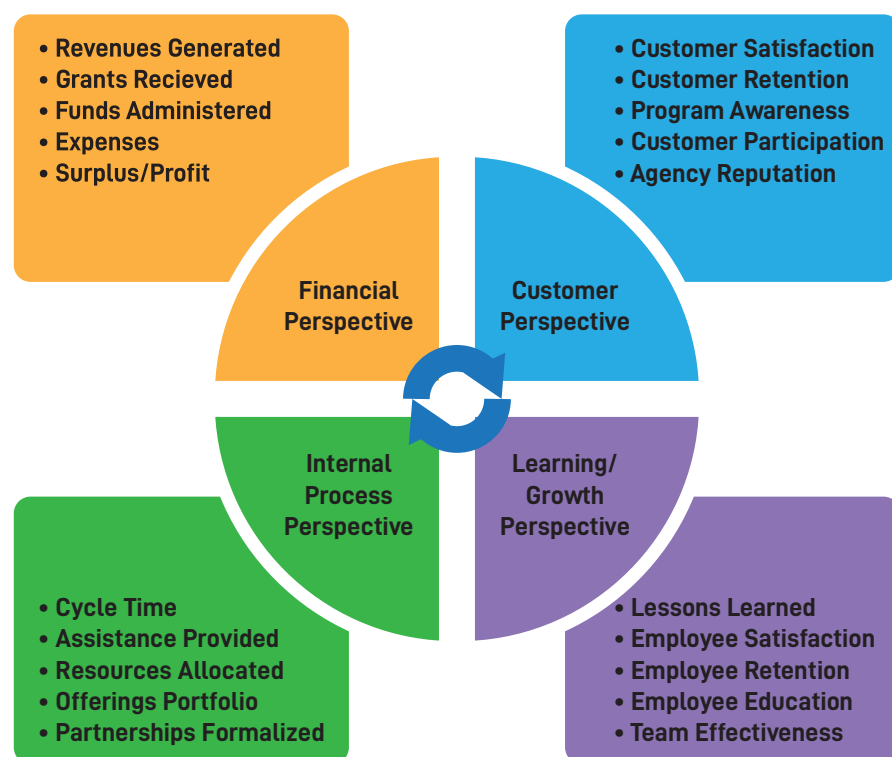
# We want to work with the community to establish performance and accountability measures

*Guiding Question: How can we determine if our collective efforts are effective without merely projecting the organization's notions of success onto the community?*

Renowned management thinker Peter Drucker is often credited with popularizing the phrase, "you can't manage what you don't measure," underscoring the importance of data tracking and evaluating performance. Decision-making that fails to take the perspectives of an organization's critical stakeholders into account is bound to miss the mark in meeting their needs. This is why the interests of the organization must be balanced with those of critical stakeholders. Determining what to measure is cultural, meaning that it is based on what is seen and valued by organizations and groups. Drucker was also known for stating "culture eats strategy for breakfast." So congruence is imperative between culture and strategy.

## Step 1: Develop a Balanced Scorecard

It is essential for users to clarify what 'success' looks like in the context of their organizations and with their local communities.



In an inclusive economy, success should not merely be determined by the amount of money made, saved, or invested. The balanced scorecard, originally developed by Harvard Business School professor Robert Kaplan and David Norton, allows organizations to define success more holistically across short and long-term horizons. It is one of the most widely used management tools in the world that takes financial, operational, customer, and organizational learning perspectives into account. Figure 5 depicts the interplay of performance metrics aligned to the mission and

Figure 5. The Balanced Scorecard Framework

---

strategic priorities of an organization. While various activities should be tracked from each perspective, these should roll up to three to five balanced key performance indicators (i.e., KPIs). Educational seminars, memoing, group brainstorming, engaging experts, and searching the Internet all represent possible tools for exploring and determining what to measure.

## Step 2: Establish Data Tracking Systems

Once KPIs and subordinate metrics have been determined, the next step would be to adopt a specialized information system, known as a customer relationship management system, that will allow users to input relevant customer or community data. Data collection will be activity-based and will span those that are intake-related—e.g., input data such as information captured on applications associated with financial assistance and small business technical assistance programs. Process data characterizes ongoing information collected after residential and business participants have been set up in the system. Finally, output data frames the popular results desired from non-profit and public sector work such as the number of jobs created and retained, the amount of financial assistance provided, hours of counseling, funds raised, etc. Once the system is in place, it will be critical to normalize its use through training and skill building, ensuring all intended users and beneficiaries, including leadership, understand its limitations and value. These activities should also be tracked and managed in a specialized information system, called a learning management system, that can be a component of the human resources management system used by the organization.

## Step 3: Periodically Report and Socialize the Benefits Realized

The information system adopted to track these activities will allow users to manipulate, analyze, and report on operational performance. This capability is important for evaluating organizational effectiveness and maintaining accountability with critical stakeholder groups. Effective and accountable organizations produce a variety of benefits for their publics that should be recognized and celebrated to maintain mutually-beneficial relationships. According to the Standard for Change Management (2019) provided by the Association of Change Management Professionals, benefits refer to “the quantitative and qualitative, measurable and non-measurable outcomes resulting from a change” (p. 6). These beneficial outcomes should be congruent with the previously agreed upon notions of success described in Step 1. While users maintain and report performance from its primary system of record, organizations may also subscribe to additional information systems provided by public and private service providers (e.g., Bureau of Labor Statistics, ESRI, EMSI, Burning Glass Technologies, etc.) to augment internal organizational data. They may also systematically commission qualitative research projects to move beyond the numbers, garnering additional insights from local stakeholders via annual meetings, interviews, forums, focus groups, etc. These activities generate raw non-numeric data that require specialized information systems for qualitative data analysis, such as NVIVO, Atlas.ti, and Dedoose.

---

# How Others Are Doing It

# How Others Are Doing It

## Lessons on Paradigm Shift

Socialization can be defined as the process of change, where perspectives are built overtime as ideas, concepts, and principles deemed important and necessary are reinforced until they are accepted. Once adopted, they are perpetuated until displaced, which requires intention, investment, and effort. To create learning organizations and communities, it will be important to create regular learning opportunities and positively reinforce successful demonstrations of desired behaviors and outcomes. Sometimes, it may be necessary to use vignettes and interactive activities where familiar solutions are designed to fail to solve familiar problems. These exercises will require participants to develop new solutions to resolve problems posed. Lessons learned should be documented along with the benefits of novel solutions socialized within the organization and among relevant community stakeholders until fully adopted.

## Lessons on Fundraising

Effective resource development is often a challenge for nonprofit and public sector organizations. Key challenges include lack of experience and knowledge gaps about fundraising among staff, competing priorities, lack of resources to leverage, silos, stress, and mission drift. Fundraising activities should be strategically pursued with relevant partners that pool resources and formalize their relationships through memoranda of understanding, letters of support, and capital allocations.

---

### Case Study: Rochester, New York

*The Mayor's Office off Community Wealth Building worked with community partners to **raise over \$19.5M** between August 2018 and October 2021. Keys to success involved unity of purpose, joint funding applications, and leveraging multiple funding sources in support of community-based and entrepreneur-led economic development strategies. Major tranformational efforts included working with entrepreneur support organizations to build a better coordinated resource partner network. The result, deeper levels of program integration, collaboration, and business resource referrals.*

# How Others Are Doing It

## Lessons on Policy Change

Innovation and creativity are essential to organizations' ability to effectively meet the shifting needs of residential and small business communities. However, organizational policies, practices, and procedures (i.e., "PPP") often pose significant barriers to nonprofit and public sector innovation. To overcome these challenges, it is important to be clear of the nature of the issue, those impacted, and frame the extent of the impact (e.g., qualitatively and quantitatively). Next, it will be important to make the "business case" for alleviating the issue. In some instances, protocols may be in place for addressing outdated PPP. Becoming familiar with those protocols will provide the means by which to update the PPP. However, where protocols are lacking, agenda setting and coalition building among influential stakeholders are invaluable actions.

### Case Study: Rochester, NY

**How the City of Rochester empowered city staff, collaborated with residents and prioritized racial equity to effectively drive planning and public policy change.**

**Project:** Rochester's Budget Equity Program

**City Office:** Mayor's Office of Community Wealth Building, Department of Human Resources Management

**Lead:** Luticia André Doucette, Equity Coordinator

**Partners:** National League of Cities, Rochester City Council, Greater Rochester Chamber of Commerce, St. Joseph's Neighborhood, the National Coalition Building Institute (NCBI), and the People's Institute for Survival and Beyond

**Situation:** How can we embed a racial equity lens within city work while advancing meaningful policy change opportunities?



The Race, Equity, and Leadership (R.E.A.L.) Initiative was established in 2014 by the National League of Cities (NLC) as a result of civil unrest in Ferguson, MO. The program aims to strengthen the capacity of cities for building more equitable communities. In 2017, the City of Rochester was invited to participate in the initiative by joining a Truth and Reconciliation Coalition cohort jointly spearheaded by the National League of Cities and the Robert Wood Johnson Foundation. Rochester was one of 12 cities from across the United States, and all charged with operationalizing changes related to race and racism both internally and externally. Over a year of discussion, it became clear cities participating in the cohort needed a better foundational understanding of the insidious nature of racism and how it shapes decision making—including policies, practices, procedures, and community engagement. Rochester was represented by the Mayor's Office of Innovation and Strategic Initiatives who had previously been funded under the Bloomberg grant to significantly address issues of poverty within the city.

**Challenge:** How can we garner support for an equity agenda among senior administrators and staff in order to become more responsive to community needs?

There were a number of distinct challenges that made it difficult to go beyond symbolic actions and substantially address structural and systemic racism in government. Across the board, city staff lacked an in-depth understanding of racism and how it contributes to poverty. Existing plans for addressing poverty were race-neutral and competing demands negatively impacted staff participation and the ability to focus on racial equity. In addition, there was early resistance from senior administrators resulting from the belief that the city's involvement with the REAL initiative was the equity coordinator's pet project that was unable to influence municipal level change. Some middle managers and staff members were also reluctant to support the initiative because of territorialism, skepticism that anything would change, and for fear of backlash by getting involved with race work. Others believed it was a waste of time because racism is an abstract concept that is difficult to quantify and measure.

**Actions:** Under the branded campaign, "Let's Get R.E.A.L.," the city was able to leverage its support from NLC to embed a racial equity lens into critical internal change activities.

The project team was able to solidify the mayor's support for the initiative during a formal briefing following NLC's official kick-off convening. A local kick-off event was hosted on the National Day of Racial Healing resulting in the public signing of

a project charter by the Mayor, City Council, and the Greater Rochester Chamber of Commerce. Months later, a baseline survey was administered to all city staff to gauge their understanding of race and racism. Nine departmental change teams were subsequently formed and empowered to examine their operations, taking note of equity issues for consideration. The services of the National Coalition Building Institute and The People's Institute for Survival and Beyond were retained to provide training on teaming and racial equity training. Beyond the workshops, the change teams were provided a guidebook, technical assistance, and were responsible for meeting monthly to identify meaningful opportunities for addressing structural and systemic barriers within their departments.

The change team composed of city staff from the Office of Management and Budget and the Finance Office realized the city's budgeting process presented multiple opportunities for addressing racial equity issues. By the beginning of the COVID-19 pandemic, they worked with the project lead to draft a racial equity budgeting tool that could be piloted for during the budgeting process for fiscal year 2020-21. Concurrently, all change teams were responsible for preparing racial equity plans that would be published in the budget and community input was obtained through a telephone town hall and an online survey.

### **Results:**

- 85 city staff, city councilors, and community members were able to participate in two and a half day Undoing Racism® Workshops and another three and a half days of teaming and diversity, equity, and Inclusion training. A community-based alumni network was formed to foster relationship-building and socialize a common set of anti-racist organizing principles.
- The project team was able to garner support from the mayor and all senior administrators for a progressive racial equity agenda in planning and budgeting by the beginning of the pandemic. The budget equity tool was expanded into a full program by the following year and with all 17 city departments required to participate.
- Council Vice President Willie J. Lightfoot's active participation on the project team led to his decision to jointly sponsor a charter amendment with the Mayor in February 2021. The amendment codified equity into the annual budgeting process requiring all City Departments to consider the implications of racial and gender equity when drafting their annual operating budgets.

- The change teams have evolved into equity teams under a new Chief Equity Officer who is now responsible for R.E.A.L. and oversees the Budget Equity Program.
- The Department of Environmental Services issued its first-ever equity centered active transportation request for proposals and now evaluates their projects with a racial equity lens.

*Images: Photos from the National Day of Racial Healing 1/21/2020. Source: City of Rochester*



---

## Case Study: Kansas City, MO

**How Kansas City is building an ecosystem to support local small and minority owned businesses towards accessing capital and contracts.**

**Project:** KC Small Business Virtual One-Stop-Shop

**City Office:** KC BizCare Office – City of Kansas City, City Manager's Office

**Lead:** Nia Richardson, Assistant to the Director for Small Business and Entrepreneurship

**Partner:** Qwally

**Situation:** How do we provide informal entrepreneurship support in the pandemic?

Since the onset of COVID-19, the KC BizCare Office has assisted over 6,000 new and existing businesses in Kansas City. The office exceeded its estimated annual interactions and referrals count from the previous year (i.e., 2019), just months into the pandemic. Since starting in 2009 the office has supported over 20,000 start-ups, entrepreneurs and micro-enterprises, each receiving 1:1 technical assistance with business registration (i.e., state, federal, city), licensing (i.e., city), navigating the city departments for required permits, and resource referrals. The office serves as a HUB to local entrepreneur support organizations by providing referrals to its partners based on the additional needs of the new and existing business owners who come through the BizCare office.

**Challenge:** Given the State of Emergency orders, how do we support small businesses that need business licenses to operate or assist them access relief?

We recognize that it is crucial to ensure that micro-enterprises and informal entrepreneurs complete the necessary registration, permitting, and licensing processes in order to be eligible for relief and recovery programs. This called for overall enhancements to KC BizCare, but more specifically, implementation of a new virtual one-stop-shop; which was built to enhance our business customer service center by centralizing resources for local informal entrepreneurs to become licensed with the city during the city's pandemic State of Emergency. This is the framework upon which we are building an ecosystem around city, state and federal requirement services.

**Actions:** Through our Start-up in Residence program, we designed and implemented a custom digital platform to enhance operations along with data tracking capabilities.

The decision to develop a virtual one-stop-shop was based on persistent requests from

residents during daily interactions in-person, by phone, and email. Residents wanted a step-by-step checklist for obtaining a business license. The ecosystem and small business support platform helps small businesses better understand important processes such as licensing, permitting, zoning, procurement and formation. Prior to adopting a customized solution, the city lacked a formal intake process, but regularly welcomed solicited and unsolicited feedback. Now, small businesses can register with the city and receive online support as they grow. City staff can provide tailored guidance, referrals, and track program outcomes. Moreover, city staff are able to share information with local and regional partners. The platform serves to create a more accessible entrepreneurial ecosystem for small businesses. To accomplish this goal, Qwally implemented the following core modules on the city's website:

- The **Small Business Portal** is a city-branded website that is publicly available. It is the "front door" or "one-stop-shop" for starting and growing a business in Kansas City.
- The **Small Business Navigator** consists of a streamlined, branded intake questionnaire that minimizes the number of questions posed to each business owner while ensuring that agency staff are gathering the necessary information. On completion of the intake questionnaire, each respondent will receive a tailored checklist of steps based on their responses.
- BizCare staff and other city users have access to an **Administrative Dashboard** that provides comprehensive program management tools. Staff are able to keep track of small businesses and potential vendors interacting with the portal.

#### Results:

- KC BizCare staff provide technical support to local entrepreneurs to understand and acquire the prerequisites needed to obtain a new business license with the City of Kansas City. Currently over 800 new licenses fiscal year 2021-22—as of November 30, 2021—and over 4,000 new licenses since the onset of the pandemic.
- The office assists the Planning Department with providing "Zoning Clearance Letters" for business owners to obtain a business license, processing 493 (FY 2019-20) to 1,115 (FY 2020-21) and currently 1,708 (FY 2021-22). The office also established an online request form that allows citizens to make requests from their phone electronically, an addition to the paper forms that were in use before the pandemic. This improvement increased service access for entrepreneurs with smart phones without contributing to the digital divide.
- Qwally partnered with KC BizCare and local community partners to launch a Paycheck Protection Program digital application and referral process. The team launched this enhancement within 10 days and allowed small businesses to access critical technical assistance from local partners. The program assisted Black and other minority owned businesses with accessing close to \$2.4M in SBA and local relief funds.

---

# Overcoming Challenges



# Overcoming Challenges

There are a number of persistent challenges faced by nonprofit and public sector professionals operating within community, business, workforce, and economic development capacities. Many of them are activity-specific corresponding to various priorities of residential and small business communities. Table 5 below provides a sample of selected equity issues by category or area of activity. Working to advance equity and inclusion in the context of this work has been referred to as social, racial, economic, and environmental justice. Each of them require active stakeholder education and participation and organizational learning to work through the issues. Additionally, some general leadership challenges include garnering buy-in, inspiring a shared vision, fostering collaboration, and maintaining accountability between organizations and the community. Overcoming many of them will organically occur as the actions discussed throughout this toolkit are pursued by users.

*Image: Worn Building on Dwight St. in Holyoke, MA. Source: Third Eye Network*



RRP Project Category	Priority Activity Areas	Possible Equity Issues
Revenues and Sales	<ul style="list-style-type: none"> <li>Promotion and marketing</li> <li>Branding</li> <li>E-commerce</li> </ul>	Diverse businesses and cultural/arts institutions are excluded from marketing materials (i.e., representation gaps), no significant investments in communities of color; tokenism; market access constraints (e.g., public, pop-up, and digital); the "Digital Divide"
Private Realm	<ul style="list-style-type: none"> <li>Buildings (Interior and exterior)</li> <li>Storefronts and displays</li> <li>Redevelopment</li> </ul>	Blight, abandonment, hazardous building materials, redlining, proximity to flood zones and other undesirable resources, physical size and configuration limitations
Public Realm	<ul style="list-style-type: none"> <li>Transportation and infrastructure</li> <li>Placemaking and landscaping</li> </ul>	<p>Movement of goods and people, the delivery of clean water and sanitation, flood protection; wayfinding systems fail to highlight institutions and assets relevant to communities of color; insurance rates influenced by race/ethnicity and gender</p> <p>Interstate highways built through communities of color depleting housing and business stock and cutting neighborhoods out of economic development opportunities; poor lighting impacting district marketing and safety; lack of district accessibility and quality public spaces impacting sales and public health</p>
Administrative Capacity	<ul style="list-style-type: none"> <li>District management</li> <li>Zoning, permitting, and licensing</li> </ul>	Capacity constraints inhibit meaningful support for diverse small business communities; regulatory requirements and process guidelines that are prohibitive
Tenant Mix	<ul style="list-style-type: none"> <li>Small business technical assistance</li> <li>Retail recruitment</li> </ul>	Disjointed and culturally incompetent curricula, monocultural staff and technical assistance providers expecting participants to "conform" to their standards; costly program enrollment fees; operational silos within and between organizations that create duplicity; days and times offered may render support inaccessible



RRP Project Category	Priority Activity Areas	Possible Equity Issues
		Low skill and low paying jobs may concentrate poverty; pollution may persist in low-to-moderate income neighborhoods due to emissions from nearby waste and industrial activity; low quality goods and services may inhibit small business growth; excessive vacancies may detract retail interests
Cultural/Arts	<ul style="list-style-type: none"> <li>Cultural community engagement</li> </ul>	Social and cultural institutions may not be represented in district marketing; capacity constraints may persist from stigma and lack access to support resources
Other	Access to capital and credit	<p>Predatory lending, check cashing, stringent universal application requirements and processes, high bank fees, redlining, requiring pre-existing banking relationships; matching capital requirement thresholds, the credit system, zoning, permitting</p> <p>Certification requirements and process guidelines that are prohibitive; municipalities and organizations with low-to-no formal commitment to supplier diversity and little follow through</p> <p>Hiring and promotion practices, growth opportunities, and seniority, standardized testing; compensation, inconsistent budget allocations, tokenism, no support staff for key personnel, lack of mentorship and guidance for newer employees, unclear recognition and rewards practices; the reporting structure, job design, quality of work life, pay equity, authority, and subjective approval processes</p>

*Table 5. Possible Equity Issues by RRP Priority Activity Areas*

---

# Key Resources

# Key Resources

## Strategic Plan Template

#	Sections
1	Vision Statement:
2	Mission Statement:
3	Guiding Principles:
4	Pillar: Goals: Success Factors:  Pillar: Goals: Success Factors:  Pillar: Goals: Success Factors:
5	Performance Indicators:
6	Major Assumptions:
7	Actionable Strategies:

## Notes

[illegible]

## Notes

[illegible]

## Notes

[illegible]

---

## References

- Barends, E., Rousseau, D. M., & Briner, R. B. (2014). Evidence-based management: The basic principles. *Center for Evidence-based Management*. 1-20. Retrieved from [www.cebma.org](http://www.cebma.org)
- Saldaña, J. (2016). *The coding manual for qualitative researchers (3rd ed.)*. Thousand Oaks, CA: Sage.
- Sue, D. W. (2015). *Race talk and the conspiracy of silence: Understanding and facilitating difficult dialogues on race*. Hoboken, NJ: Wiley.
- Schein, E. H. & Schein, P. (2017). *Organizational culture and leadership (5th ed.)*. San Francisco, CA: Jossey-Bass.
- Porter, M. E. (1996). What is strategy? *Harvard Business Review*, 74(6), 61-78. Retrieved from <https://hbr.org/>



**For more information, visit:**

[www.mass.gov/info-details/rapid-recovery-plan-rrp-program](http://www.mass.gov/info-details/rapid-recovery-plan-rrp-program)

If you have questions about the RRP program, contact:

**Emmy Hahn**

MDI/RRP Program Coordinator, DHCD  
[elizabeth.hahn@mass.gov](mailto:elizabeth.hahn@mass.gov)

**Chris Kluchman**

Deputy Director, Community Services Division, DHCD  
[chris.kluchman@mass.gov](mailto:chris.kluchman@mass.gov)