

I. INTRODUCTION AND OVERVIEW

The Orange Countywide Racial Equity Plan: A Framework for Moving Forward is being developed with a commitment that we will uncover and address implicit biases in our institutions to ensure that race no longer can be used to predict life outcomes in our community. Between October 2020 and January 2021 elected officials of the Towns of Carrboro, Chapel Hill, Hillsborough and Orange County were provided with a Progress Report on Racial Equity and agreed to advance racial equity countywide. (See Appendix A)

This Progress Report was given to elected officials and other stakeholders on the multi-jurisdictional workgroup tasked with drafting the Orange Countywide Racial Equity Plan on April 16, 2021. The multi-jurisdictional task force has employees from the Towns of Carrboro, Chapel Hill, Hillsborough, and Orange County. Carrboro, Chapel Hill, and Orange County completed the Government Alliance on Race and Equity (GARE) North Carolina Cohort Racial Equity Capacity Building training. Hillsborough is a GARE member and may participate in the Capacity Building training later but has been through GARE's foundational training.

II. COMMITTEE REPORTS

In January 2021, the GARE Task Force established subcommittees to work on each section of the plan. The five multi-jurisdictional subcommittees are led by at least one jurisdictional member, and includes staff from each jurisdiction. The subcommittees are: Training, Racial Equity Tool Kit, Community Engagement, Racial Equity Index, and Evaluation and Accountability. Here are the Subcommittee Reports:

A. Racial Equity Tool Kit (Carrboro Lead, Anita Jones-McNair)

The Racial Equity Tool Kit Subcommittee conducted preliminary research on how to design a tool that evaluates jurisdictional governance. Using a Countywide process to dismantle institutional and structural racism provides consistency, assurance, and accountability for county residents. This evaluation process can evaluate policies, practices, services, and new initiatives that impact racial equity.

Just to recap the purpose of this tool, the Racial Equity Tool evaluates new and/or existing policies, practices and initiatives through a racial equity lens. Hopefully the evaluation results align with racial equity goals. The tool was designed to compile and examine the following information:

1. Desired Results
2. Data Collection & Analysis
3. Community Engagement/Partnership
4. Strategies
5. Implementation
6. Communication, Evaluation, and Accountability

We discovered that through discussion, research, and communication with other jurisdictions using the racial equity tool, more relevant information emerges.

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Here is what we know –

- The importance of racial equity evaluation.
- The tool in its current form is difficult and time-consuming to navigate each time a jurisdiction needs to examine services through a racial equity lens, regardless of whether it is a new initiative or existing policy or practice.
- Calibrating how and when the tool/process is used can make a difference in its overall effectiveness.
- Create a fundamental process that allows us to examine services now and prepare for future needs.
- This tool is a work in progress, which includes naming the instrument.

Our goal is to redesign the instrument so that it can be flexible and meet the needs of each jurisdiction. (See Appendix B) We recommend using this tool for one year. After the duration of time, the subcommittee can reconvene to review the instrument's use and necessary updates based on real experiences.

Note that within this summary, the words “tool”, “process”, “instrument”, and “evaluation” are being used interchangeably.

B. Community Engagement (Chapel Hill Co-Leads, Rae Buckley and Sarah Vinas)

The Community Engagement Subcommittee focused on the racial equity principles for conducting community engagement as taught by GARE. The subcommittee includes communication and community engagement staff from Carrboro, Chapel Hill, Hillsborough, and Orange County. Each municipality is experimenting with engagement tactics to reach marginalized communities so the committee focused on establishing shared principles for shifting the power dynamics in government to prioritize the perspective of communities most impacted by racism. The draft principles are listed below:

1. Government is committed to change toward a new power dynamic for shared decision-making working together with the community.
2. Government will listen, learn, and implement solutions from all communities, especially impacted communities of color.
3. Government will co-design desired results and engagement processes (such as the IAP2 Spectrum of Public Participation) with the community.
4. Government will provide training and technical assistance for employees seeking to engage and build partnerships with the community.

Racial Equity Index (Orange County Lead, Nancy Coston)

The Racial Equity Index committee will develop a countywide racial equity index and community scorecard to track Orange County’s equity metrics. The first work deliverable will be developing an overview of available relevant data and organizing it into a user-friendly public-facing web page. The following action steps and timelines are anticipated:

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- Identify key indicators, data sources, and platforms for the overview of Orange County demographics. This overview will include relevant data about race and disparities in critical areas such as income, education, and health. The timeline for completion of this work is June 2021.
- Develop a racial equity index depicting the correlations of key indicators to predict outcomes and impacts on racial disparity in identified critical areas such as income, education, and health. This work will probably require outside resources, and committee members will be meeting with organizations with this capacity. The committee will recommend a methodology for the index by June 2021 and anticipates completing the work by Fall 2021.

C. Training (Hillsborough Co-Leads, Haley Bizzell and Jen Della Valle)

Organizational Capacity

Organizational capacity is a key component in advancing racial equity efforts. This includes a plan to provide training to build capacity to advance and embed racial equity in countywide systems. It is important to provide adequate racial equity training to ensure that employees, elected officials, advisory boards, and community partners learn how to incorporate an equity lens in their everyday work and decision-making processes.

GARE racial equity training topics include:

- History of race
- Implicit and explicit bias
- Institutional and structural racism
- How to use and apply racial equity tools

Targeted training groups:

- Elected officials
- Management/supervisors
- Non-management
- Advisory board members
- Community/business partners
- General public

To ensure that an organization is ready to train the various groups, each organization should look at the organization's readiness to make a change. Leadership needs to be supportive of efforts and there needs to be a clear vision. An organization must also make sure it has the appropriate resources such as staff time and budget. Training can be provided as a requirement for all staff or as a voluntary opportunity.

Appendix "C" has a more detailed framework that has been developed by Town of Carrboro, Town of Chapel Hill, Town of Hillsborough, and Orange County as a set of best practice guidelines to review and consider prior to implementing racial equity training.

D. Evaluation and Accountability (Orange County Lead, Annette Moore)

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The Evaluation and Accountability Subcommittee is working on an evaluation plan based on the Results-Based Accountability principles (RBA) framework. The RBA framework provides a disciplined, data-driven decision-making process to help local governments take action to solve problems. RBA is a tool that "starts with the desired result and works backward to the means, to ensure the desired results that your plan works toward community results with stakeholder-driven implementation." Results-based accountability helps distinguish between population level (whole group), and performance measure (activity-specific) indicators that organizations use to determine whether they are having an actual impact. The RBA framework indicates the relationship over time between results, indicators, and activities. It is based on seven questions of population accountability:

1. What are the desired results?
2. What would the results look like?
3. What are the community indicators that would measure the desired results?
4. What does the data tell us?
5. Who are your partners?
6. What works to change the data trend toward racial equity?
7. What actions should you start with?

Performance Accountability for Actions: The Road to Getting to Results

In using the RBA framework, the groundwork has already been set. For each community indicator, the group has identified a set of actions. Facilitated action planning sessions help to refine the steps. Population-level indicators and results will then help to build a performance plan. Performance measures will ensure actions or activities are crafted in a way to decrease racial disparities. More details are outlined in Appendix D.

Some questions asked in this process are:

1. Who do you serve?
2. What is an action's intended impact?
3. What is the quality of the action?
4. What is the story behind the data?
5. Who are the partners with a role to play?
6. What works to have a greater impact?
7. What are the next steps?

Develop a Stewardship Plan

Some questions asked in creating a stewardship plan are:

1. Are there outcomes and actions that are receiving less attention than others?
2. Is there a need to change the plan?
3. Have plan actions been implemented or are in progress? What do the results indicate as to how to improve?
4. Is there an explanation and/or proposal for resolving the issue if there are unmet or blocked actions?

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5. Are there racially diverse staff working on the plan over the year(s)?
6. Are residents of color engaged in the implementation of the plan over the year(s)?
7. Are measures being recorded and updated as actions change, or are they completed?
8. Is the jurisdiction reporting on challenges and successes?

III. PROJECTED TIMELINE

Below is the Countywide Racial Equity Plan's timeline as well as the projected timeline the GARE Teams have agreed on to complete this project:

October 2019 – January 2021	GARE NC Cohort – Building Capacity for Racial Equity
September 2020	Progress report – proposal for Countywide Racial Equity Plan
October 2020	Carrboro and Hillsborough Town Boards and Orange County Board agree to Countywide Racial Equity Plan
January 2021	Chapel Hill Town Council receives update about Countywide Racial Equity Plan
January 2021	Multi-jurisdictional subcommittees formed
April 2021	Subcommittee progress report to elected officials compiled and shared with managers/elected officials
April 2021	Completion of first draft of report framework
April – May 2021	Community/Stakeholder Engagement Comment Period
May 2021	Initial review and comment period by elected officials
May 2021	Review and Finalize Plan by Subcommittees and Co-Leads
June 2021	Approval by elected officials of the first draft with additions, changes, or comments
June – August 2021	Review of changes and finalization of draft plan by committee
September – October 2021	Countywide public hearing
Fall 2021	Review of draft for approval by elected officials

IV. NEXT STEPS

I. Next Steps

1. Progress report submitted to managers and elected officials.
2. Preliminary engagement of some stakeholders – answering questions about the plan.
3. Include responses in the background information of the racial equity action plan.
 - a. Examples of Community/Stakeholder Engagement
 - Chapel Hill-Carrboro of the NAACP members
 - Northern Orange Branch of the NAACP members

- El Centro Hispano members
- Human services agency groups
- Marian Cheek Jackson Center
- Public housing residents
- Inter-Faith Council residents
- Refugee Community Partnership members
- Refugee Support Center
- Long -Term Recovery Groups/contacts
- Orange County Changemakers
- Orange County Partnership to End Homelessness
- Local Reentry Council
- Orange County Community Remembrance Coalition
- Rogers-Eubanks Neighborhood Association (RENA)
- Cedar Grove Community Center
- United Voices of Efland Cheeks
- Orange Congregations In Missions

b. Community/Stakeholder Engagement Questions

- What three results would you like to see as a result of this plan?
- What sections of this plan will help us achieve those results?
- Who should be involved in future community engagement?
- Who is negatively affected by using this framework/plan?
- What do you see as the most critical racially equitable outcomes?

Please let your GARE Team lead know any comments, questions or concerns you have about this timeline for moving forward.

V. APPENDICES

APPENDIX A. PROGRESS REPORT

Progress Report sent to Carrboro, Chapel Hill, Hillsborough and Orange County elected officials between October 2020 and January 2021. See Link to Orange County Board of County Commissioners' Meeting, October 8, 2020 [here](#).

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APPENDIX B. RACIAL EQUITY TOOL KIT

Racial Equity Review

This review aims to evaluate a new or existing initiative and illustrate how it aligns with the County's or Town's racial equity goals.

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Name of Initiative (Practice/Project/Service/Policy)	New or Existing?	Who is Conducting Review?
ORIGIN AND DESCRIPTION OF INITIATIVE <ul style="list-style-type: none"> For new initiatives – why this initiative and why now? For existing initiatives- include background information and milestone dates 		
DESIRED RESULT <ul style="list-style-type: none"> What specific results/outcomes are intended for the community or internally? 		
DEMOGRAPHICS (be as specific as possible) <ul style="list-style-type: none"> Who is this initiative focused on? (Neighborhoods, geographic areas, racial groups, income groups, employees, etc.) What data can you provide to describe your target population? What data is missing? 		
BENEFITS <ul style="list-style-type: none"> Who benefits directly and indirectly from this initiative? How? Share any relevant data (link to jurisdictional map and/or information) 		
IMPACTS <ul style="list-style-type: none"> Who is negatively impacted by this initiative? How? For new initiatives consider impacts during and after this initiative? How? What can be done to mitigate (any) negative impacts? Are there any challenges that need to be overcome? How? Share any relevant data 		

COMMUNITY ENGAGEMENT

- How have you involved community members in developing this initiative?
- Have you involved those directly impacted?
- How have you addressed the concerns raised by community members?
- Going forward, how do you plan to include voices of those most impacted / burdened?

ACCOUNTABILITY

- How will the impact of the initiative be measured?
- How will you share results with your department and leadership?
- How will you share results with community members and stakeholders?
- How will you incorporate feedback from community members and stakeholders?

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APPENDIX C. TRAINING/ORGANIZATIONAL CAPACITY FRAMEWORK

Purpose: The training committee will develop a plan to provide training to policymakers, managers, staff, boards and commission members, community partners, and the general public to build capacity to advance racial equity and to embed racial equity into countywide systems.

- 1. Each organization should identify the following prior to providing racial equity training:**
 - a. Organization's racial equity vision – this will allow the organization to determine how the training can align with and make progress toward the overall equity vision.
 - b. Purpose of the training
 - c. Training goals
 - d. Assessment of what has already been done, such as policy revisions and previous trainings including the content, focus, and perspectives of previous trainings.
 - e. Next steps after training and who is responsible for moving those efforts forward.
- 2. Questions to ask prior to training:**

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- a. What is the staff's capacity to take on this training and time commitment?
- b. Does the organizational culture support candid conversations around race and equity?
See Organizational Capacity section below.
- c. Is leadership invested in transformative change?
- d. What do employees expect and/or want to get out of the training? Training can then be tailored to those interests.
- e. What are timely next steps for participants?

3. Structure of training:

Below are guidelines and/or suggestions and considerations for the structure of racial equity training.

- a. Adapt presentation style for each member group ensuring diversity of participants within each training session.
 - i. Elected officials
 - ii. Management/supervisors
 - iii. Non-management
 - iv. Advisory board members
 - v. Community/business partners
 - vi. General public
- b. Multiple training facilitators across jurisdictions & a technical support person
 - i. Have diverse facilitators to keep trainees engaged including at least one facilitator that is representative of the majority of the group regarding gender and race.
 - ii. Consider having a technical support person to help facilitate.
- c. Offer initial training to start the conversation around racial equity and provide background information.
 - i. Balance lecture with discussion, breakout sessions, and group discussions.
 - ii. GARE training should be completed consecutively.
 - iii. Training length, including the number of days and hours, will likely vary for each organization depending on the culture, goals, purpose of the training, and the number of people in attendance.
- d. Suggested preparation
 - i. Practice presenting the training beforehand.
 - ii. Review GARE's FAQs to prepare for answering staff questions.
 - iii. Share resources including training content and FAQs with facilitators across organizations.

4. Training Content:

- a. Initial background/information session on racial equity. This introductory training would be geared toward new employees or people who have not attended racial equity training. The initial training helps build a shared language and understanding of basic concepts. When presenting the training content, consider varied literacy and learning styles across participants.
- b. On-going/follow-up training
 - i. Implicit and explicit bias

- ii. Institutional and structural racism
- iii. Racial equity tool – what it is and how to use it for your organization.
- iv. Inclusive outreach and public engagement
- v. Operationalizing and organizing racial equity
- c. After the training, ask for feedback or an evaluation to help improve future training content.

1. Organizational Capacity:

- a. Organization’s culture
 - i. Is the organization ready to make changes to advance racial equity?
- b. Develop, engage and maintain a core team of employees from multiple levels of influence across departments.
- c. Time commitment
 - i. Facilitators and participants
 - ii. Initial training from GARE and learning COHORT process.
 - iii. Train the trainer approach.
 - iv. Management & supervisors time to attend trainings and complete assignments outside of training.
- d. Resources
 - i. Budget
 - ii. Community partners
 - iii. Employee commitment
 - iv. Full-time diversity, equity, and inclusion position
- e. Cross-organizational teams
 - i. Facilitation

VII. APPENDIX

APPENDIX D. EVALUATION AND ACCOUNTABILITY SUBCOMMITTEE

PURPOSE: The Evaluation and Accountability Committee will develop an Evaluation Plan based on the principles of [the Results-Based Accountability \(“RBA”\) framework](#). RBA is a national model and provides a disciplined, data-driven, decision-making process to help local governments take action to solve problems. The approach delineates between community conditions/ results and performance accountability/outcomes. Our Evaluation Plan will help us apply racial equity principles embedded into the Results-Based Accountability (RBA) methodology into the Orange County Racial Equity Action Plan.

Results and Community Indicators that Create Outcomes

1. What needs or opportunities were identified during the research and assessment phase of this process?
2. What needs to be different in our jurisdiction’s culture, workforce, policies, practices, and procedures?
3. What change do we ideally want (not just for what we would settle)?

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4. What does our jurisdiction define as the most important racially equitable outcomes? (Should be answered by the Community)
5. What are some known racial inequities in your jurisdiction? What does population level data reveal about root causes or factors influencing the racial inequity?
6. What are the root causes or factors creating these racial inequities?
7. How does your jurisdiction's relationship with communities of color need to change?
8. How can those most adversely affected by an issue be actively involved in solving it?
9. How will proposed outcomes address root causes of racial disparities and advance institutional and/or systemic change?
10. What government programs will this proposal impact? What are the opportunity areas? I.e. budget, health, jobs, social services, criminal justice?
11. How do you ensure your proposal is working and sustainable over time?

Creating Actions to Achieve Outcomes

1. Were actionable solutions identified during the information gathering phase of this process by communities of color?
2. Which actions were identified as priorities by the communities of color?
3. What is a specific change in policy, practice, or procedure that could help produce more equitable outcomes? Are these changes working together, in a complementary way?
4. How will an action decrease racial disparities?
5. Are there any unintended consequences? Who benefits; who will be burdened? Can they be mitigated?
6. Will the proposal impact specific geographic areas and what are the racial demographics of those areas?
7. What capacity is needed to successfully implement the action? Is it adequately funded?
8. How will an action be implemented and by whom?
9. Is the action achievable within the lifetime of the plan?
10. Is the action measurable and how will it be measured?
11. What performance level data is available for the proposal? Are there gaps in the data that need to be filled and/or tell us about the racial inequity in our community.
12. How will the racial equity plan be communicated, internally and externally? Is the communication reaching the intended audience?
13. How can the plan be systematized?

Who is Responsible or Accountable for Completion of Each Action (Stewardship Plan)

9. Ongoing coordination
 - a. What is needed?
 - b. Who is accountable?
 - c. How will they be held accountable?
 - d. Is the plan durable?
 - e. Does the plan allow for continuity and succession?

10. Ongoing, Racially Equitable and Relevant Engagement

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- a. Community Engagement
- b. Stakeholder Engagement
- c. Staff Engagement
- d. Boards and Commissions
- e. Elected Officials

11. Annual Progress Reporting prior to the Budget Process

- a. Are there outcomes and actions that are receiving less attention than others?
- b. Is there a need to change the plan? (Process Improvements annually)
- c. Have plan actions been implemented or are in progress? What do the results indicate as to how to improve?
- d. If there are unmet or blocked actions, is there an explanation and/or proposal for resolving the issue?
- e. Are racially diverse staff working on the plan over the year(s)? How many?
- f. Are residents of color engaged in the implementation of the plan over the year(s)? How many?
- g. Are measures being recorded and updated as actions change or are completed?
- h. How many citizens are engaged?
- i. Each jurisdiction reports on challenges and success annually to elected officials.

4. What are the resource gaps?

5. How will we prioritize the needs?

- a. What is needed?
- b. Who is accountable?
- c. How will they be held accountable?
- d. Is the plan durable?
- e. Does the plan allow for continuity and succession?