

2023

Toolkit of Best Practices to Advance Racial Equity

Housing and Community Development California



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Guidebook Purpose

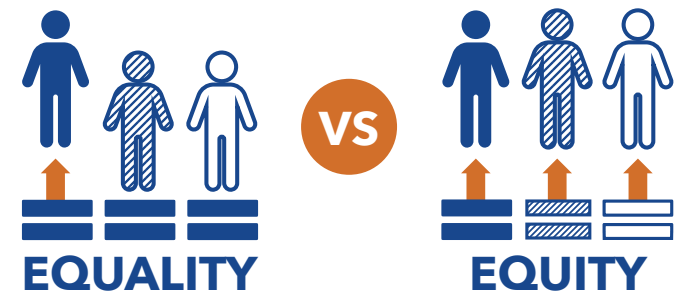
The California Department of Housing and Community Development (California HCD) Emergency Solutions Grants (ESG) Guidebook of Best Practices to Advance Equity aims to remove barriers for subrecipients and sub-subrecipients when implementing equitable practices and programming when administering grant funds. Equitable program design looks different in every community. This guidebook is not a definitive approach for advancing equity; rather, it serves as a starting point and resource for subrecipients and sub-subrecipients to understand ways to ensure more equitable outcomes for their ESG program.

Without a deliberate focus on equity in the strategy development process, communities may unintentionally exacerbate inequities.

The California HCD Action Plan amendments allow for significant flexibility for ESG subrecipients and sub-subrecipients. This flexibility allows for the adoption and implementation of equity-oriented practices. This guidebook provides concrete and practical strategies for advancing equity. Regardless of team members' backgrounds or experiences, equity is a process and journey of ever-evolving learning experiences. There is not a single path to implementing programs that create equitable outcomes. The most effective ESG programs rely on cooperation and strong problem-solving relationships among California HCD, subrecipients, sub-subrecipients, and the people most affected individuals with lived experience and expertise regarding homelessness or housing insecurity.

Why Equity Matters

Equality means that all people, regardless of their race, ethnicity, gender, disability, age, household type, and so forth, are provided with the same resources, pathways, or supports to access opportunities and/or goals. As an example, equality would be giving every single household in a rapid re-housing project the same type of unit and the same rental subsidy. Equity means that one's identity and/or background, including race, ethnicity, gender, disability, age, household type, and so forth, contribute to the types of resources, pathways, or supports people are provided with to access opportunities. As an example, an equitable approach to a rapid re-housing enrollment would base the type of unit and rental subsidy amount that any household receives on factors such as the number of people in the household, disabling condition and accessibility needs, and monthly income. Equity acknowledges and functions from the reality that people are situated to opportunities differently, based on factors such as systemic and institutional racism and discrimination, ableism, sexism, and circumstances. An equitable approach ensures that the support being provided moves everyone closer to opportunities, providing people who are situated further from opportunities with more support than those who are closer to opportunities.





are historically minoritized and excluded; furthermore, people of color with disabling conditions experience inequities that white people with disabling conditions do not. The intersectionality of race with other minoritized and excluded identities compounds inequities. Racial inequities persist in every system across the country.

Racial identity. The concept of “race” was socially constructed to group and divide people based on skin color; it was used to deny rights and justify social inequality.² The biological basis of race is not real and yet the social concept of race is deeply embedded in our society and continues to be used as a way of classifying individuals and groups.

How a person identifies racially, ethnically, and culturally (e.g., Black, African American, Latino/a/e/x, Middle Eastern or North African, Ojibwe, Jewish, Mexican, Korean American) is a personal preference. It is important to ask people how they identify and not make assumptions based on how someone looks.

When creating programs to address the needs of underrepresented groups, it is important to name the groups to work with and not use abbreviations such as POC (people of color) or BIPOC (Black, Indigenous, people of color). These are homogenizing and minimize the rich diversity and key differences among varied ethnicities and cultures.

It is critical for the community to discuss and determine how to identify and refer to each other and to various groups.

When in doubt, always ask the person or group how they want to be identified. As noted earlier, terms and concepts are always evolving; additionally, individuals will have different preferences about how they want to be identified, which may differ from how others within the same group want to be identified. This is not about “getting it right”; it is about being open to learning, growing, and creating space for people to identify who they are for themselves. Therefore, ongoing, open communication with people about these topics is important.

Establishing a foundation for racial equity work requires a common language. Terms and concepts related to race are always evolving, as is our own understanding, local context, and community relationships. To develop a shared understanding of what equity is, the following represents key terms excerpted and adapted from a variety of resources.

Racial equity. We lead with racial equity explicitly, *but not exclusively*. Many groups have been *historically minoritized and excluded*¹—based on race, ethnicity, gender, sexual orientation, disability, religion, geography, citizenship, income, education, and so forth—however, within those identities, there are inequities based on race. For example, people with disabling conditions

¹ Historically minoritized and excluded refers to individuals and groups that have historically had less economic, social, and political power or representation based on race, sex, religion, ethnic origin, or disability due to their systematic and intentional exclusion because of social-colonial constructs that continue to persist in modern-day society.

² <https://newsreel.org/guides/race/10things.htm>

National Objectives & Equity

President Biden signed [Executive Order 13985](#) immediately following his inauguration in 2021. The Executive Order [On Advancing Racial Equity and Support for Underserved Communities Through the Federal Government](#) declared that

“affirmatively advancing equity, civil rights, racial justice, and equal opportunity is the responsibility of the whole of our Government.”

This explicit call to action has challenged all federal agencies to acknowledge and work to remedy inequities harbored in their policies and programs. Achieving racial equity is a fundamental element of change needed in the homeless response system. Yet the structural racism that endures in U.S. society, which is deeply rooted in our nation’s history and perpetuated through racist policies, practices, attitudes, and cultural messages, impedes us from attaining it. The impact of structural racism is evident not only in societal outcomes but in the very institutions that seek to positively influence them.³

Institutionalized housing discrimination through government-sanctioned exclusionary zoning practices, racially restrictive covenants, redlining, steering, appraisal devaluation, and subprime and predatory lending practices continue to have dire consequences for Black, Indigenous, and all people of color today. This pattern of systemic racism has been intensified by a homeless response system grounded in white dominant cultural norms and further marginalizes Black, Indigenous, and all people of color experiencing homelessness.

In 2018, the U.S. Department of Housing and Urban Development’s (HUD) Office of Special Needs Assistance Programs put communities on notice that efforts to prevent and end homelessness should consider and address racial inequities to achieve positive outcomes for all persons experiencing homelessness through the annual Continuum of Care (CoC) Program Competition. Similarly, in a historic decision by the State of California, the Capitol Collaborative on Race and Equity (CCORE) set out “to begin the work of a whole-of-government approach to racial equity.”⁴ CCORE represented 25 State of



California departments, offices, agencies, commissions, and conservancies that completed a 15-month capacity-building cohort on advancing racial equity.

Three years later, President Biden sent a [Memorandum on Redressing Our Nation’s and the Federal Government’s History of Discriminatory Housing Practices and Policies](#) to Secretary of Housing and Urban Development Marcia Fudge, in which he acknowledged that “during the 20th century, Federal, State, and local governments systematically implemented racially discriminatory housing policies that contributed to segregated neighborhoods and inhibited equal opportunity and the chance to build wealth for Black, Latino/a/e/x, Asian American and Pacific Islander, and Native American families, and underserved communities.” We must continue to support the overall shift toward racial equity and justice in our training and technical assistance delivery that centers racial equity and has supports in place to sustain existing racial equity work beyond the specific support provided to communities during the COVID-19 pandemic response and ESG–CV funding.

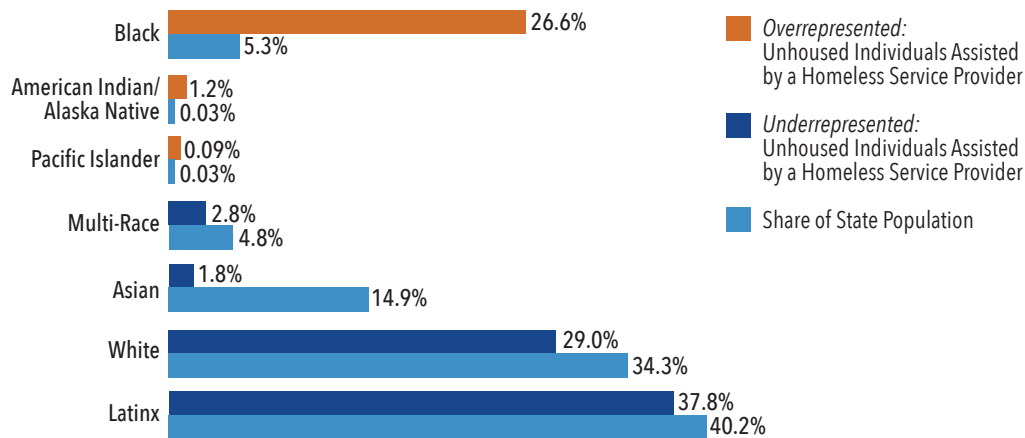
³ <https://www.equityinthecenter.org/wp-content/uploads/2019/04/Equity-in-Center-Awake-Woke-Work-2019-final-1.pdf> (Page 4)

⁴ <https://www.racialequityalliance.org/2021/11/17/california-state-government-teams-complete-racial-equity-learning-program/>

The State of California and Racial Disparity

According to the fiscal year 2023 Action Plan Executive Summary, on any given night, more than 161,000 people are experiencing homelessness in California, representing more than one-quarter of all people experiencing homelessness in the United States. Homelessness in California reflects stark racial inequities and the impact of systemic racism. A report by the [California Budget and Policy Center](#) stated that Black Californians make up about 7% of the State’s population yet represent nearly one-third (31%) of the more than 161,000 people experiencing homelessness across the State. Black Californians are disproportionately likely to experience homelessness and American Indian and Pacific Islander Californians are also especially affected. Black Californians comprised more than 1 in 4 unhoused people who contacted a homelessness service provider in the 2021–2022 fiscal year. Separate data from the 2022 point-in-time count show an increase in the share of Californians experiencing homelessness who are Latino/a/e/x. These stark racial disparities reflect harmful current and past racist policies that have created educational, housing, economic, and health barriers for people of color—all of which directly affect an individual’s ability to obtain and sustain stable, affordable housing.

Figure 1: Percent of Unhoused Individuals Assisted by Homeless Service Providers, FY 2021-22



Note: Race/ethnicity categories are mutually exclusive. State population estimates are for the 2021 calendar year.

Source: Budget Center analysis of US Census Bureau, American Community Survey public-use microdata downloaded from IPUMS-USA and custom tabulations from the California Homeless Data Integration System.

According to the most recent Action Plan Executive Summary-FY 2023, on any given night, more than

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7%

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Over 1 in 4

unhoused people who contacted a homelessness service provider in the 2021-22 fiscal year were Black.

Long-standing racist policies and practices also have concentrated marginalized communities in undervalued occupations, increasing their economic insecurity, which is a primary driver for experiencing homelessness. We see this today as people of color are largely pushed into lower paying occupations, are the first to lose their jobs during economic downturns and experience the highest rates of unemployment. Consequently, Californians of color face a higher risk of housing instability and are more likely to pay unaffordable portions of their income toward rent. Institutionalized practices also have placed Black and other communities of color at the highest risk of justice system involvement, which can cause and exacerbate the length of homelessness.

Equity in Practice

Part I. Understanding the Data

Each year the National Alliance to End Homelessness (NAEH) publishes its [State of Homelessness](#) report, including detailed information on homeless statistics, bed inventory, system capacity, special populations, and disparities by race, ethnicity, and gender. Since 2018, it has been well documented across the country that historically minoritized and excluded racial and ethnic groups are often more likely to experience homelessness, specifically Native Hawaiians and other Pacific Islanders, Native Americans, and Black or African Americans. In the most recent version of NAEH's State of Homelessness report, click on the State of California on the first map; it will display a more [detailed view of the State](#), or a specific California CoC in order to deepen your analysis.

The most recent version of AHAR Part 1 shows that the State of California has the highest percentage of people experiencing homelessness who are unsheltered. It also shows that California is one of the States that has had the largest increase in homelessness from 2007 to 2022.

Another report that leverages data from the annual Point-in-Time (PIT) count is the [Annual Homeless Assessment Report \(AHAR\) Part I - PIT Estimates of Homelessness in the U.S.](#) This report is issued by HUD each year and includes Part 2, which looks at data other than the PIT count, including Longitudinal Systems Analysis data, to provide Congress with a more comprehensive analysis of what homelessness looks like across the country. AHAR Part 1 looks at racial and ethnic disparities in the PIT count; however, it also looks at other disparities, including with regard to household types, sheltered and unsheltered populations, and households accessing Rapid Re-Housing and Permanent Supportive Housing. The most recent version of AHAR Part 1 shows that the State of California has the highest percentage of people experiencing homelessness who are unsheltered. It also



shows that California is one of the States that has had the largest increase in homelessness from 2007 to 2022.

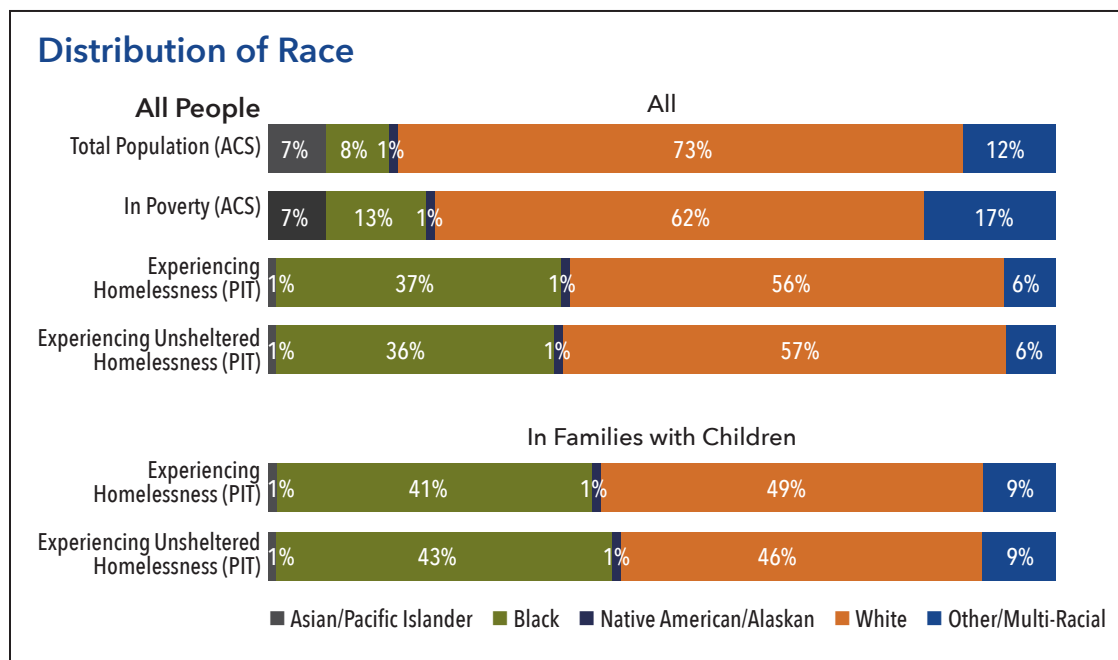
While these reports can help us understand trends in homelessness across the country from year to year, and even within CoCs, they should be used in partnership with other reports and data available to communities at the local level. This is because these reports rely on PIT count data to speak to the homeless statistics they cite, and as explained later in this section, no single data set can tell a community everything it needs to know to understand how its homeless response system is serving people experiencing homelessness and what disparities exist in how people are being served.

Data and Its Limitations

According to “[Moving Beyond the Equity Plateau](#),”⁵ a study of 29 CoCs, led by the National Innovation Service (NIS):

“... [C]ommunities who intend to advance racial equity within the homeless response system are making progress on these two strategies [disaggregating data based on race and ethnicity to understand current disparities and seeking equitable representation that includes people with lived experience in decision making roles] but have hit a plateau on what to do next and how to advance more operational changes that require a deeper level of accountability. There is a sense of stagnation and being overwhelmed and a desire for guidance on what to do next to operationalize equity. Communities are, however, continuing to seek a “check box” solution in their quest to take the equity work to the next level, when the next level of work will require a focus on deeper relational and culture shifts.”

Figure 2: Example Reading of Distribution of Race Chart from HUD’s CoC Analysis Tool



New to Data: HUD CoC Racial Equity Analysis Tool

In 2019, HUD released the [CoC Racial Equity Analysis Tool](#) for communities to develop a baseline understanding about who experiences homelessness and what racial disparities may exist. This tool prepopulates information drawn from the PIT count and American Community Survey data and serves as a good starting point for communities. This tool supports communities in understanding the disparities that exist regarding who is counted during the PIT count compared with the general population and the population of those in poverty; however, it does not examine the disparities that exist regarding how people are served by the homeless response system. Additional reports and data are needed for communities to analyze and understand the disparities in the homeless response system. The tool does not show data at the State level, only the CoC level.

As an example, the most recent version of the tool, as of this guidebook’s writing, shows that, for CA-500, there is both underrepresentation (Asian, Other/Multiracial) and overrepresentation (Black, American Indian/Alaska Native, White) in who was counted during the 2021 PIT count, compared to representation in both the general population and the population of those in poverty. HUD offers a CoC Analysis Tool: Race and Ethnicity Overview Video [here](#).

⁵Moving Beyond the Equity Plateau, NIS: https://static1.squarespace.com/static/5e18db88dc57ef26767dda23/t/615f33bcd7933f19749d9967/1633629116794/Moving+Beyond+the+Equity+Plateau_Final.pdf

Moving Beyond Data Basics: Longitudinal Systems Analysis and Stella Performance and the Homeless Data Integration System

The Longitudinal Systems Analysis (LSA) report is produced from each CoC's Homeless Management Information System and submitted to HUD each year via Homelessness Data Exchange (HDX) 2.0. The LSA is used in [AHAR Part 2](#), which is a report that provides key insights to Congress about the state of homelessness and the response to homelessness across the country. Additionally, data from the LSA are visualized in HDX 2.0 through Stella P(formance). Stella P visualizes system-level performance for measures such as the length of time households experience homelessness, the number of households exiting to permanent destinations, and the number of households returning to homelessness. Stella P also shows system performance disaggregated by different household types, race, and ethnicity of heads of household, and other key characteristics of households to help communities understand how different households are served in their homeless response system. A [dashboard](#) was developed to show each California CoC's major performance metrics from the LSA, including an option to see the data at a statewide level. As an example, from this dashboard, we see that the length of time Native Hawaiian/Pacific Islander people experience homelessness in CA-509's homeless response system is much longer than other people served.

In 2020, the State of California launched the Homeless Data Integration System (HDIS), a project several years in the making that collects information from all 44 CoCs to provide data about homelessness across the State. With HDIS, the State of California could, for the first time, have a de-duplicated count of people experiencing homelessness and data could be analyzed in new ways, including understanding how many people from one CoC were served by another CoC over time. The California Interagency Council on Homelessness (Cal ICH) provides oversight and management of HDIS and has created [dashboards](#) to visualize the racial disparities that exist in homelessness across the State to support CoCs in understanding and addressing the disparities that exist in the homeless response systems in California. Additionally, Cal ICH has committed to tackling racial disparities in homelessness through its [Action Plan for Preventing and Ending Homelessness in California](#).

No "One Report to Rule Them All"

Communities have access to a significant amount of data about people accessing their homeless response system. No single report or data set will be able to tell a community everything they need to know about what disparities exist in their homeless response system or what strategies to implement to address disparities. Each report and/or data set can reveal certain key insights, while other reports and/or data sets will reveal other insights. Analyzing the data in relation to each other will support communities in more holistically understanding how the system operates, who it serves, and what disparities exist in how the system serves people.

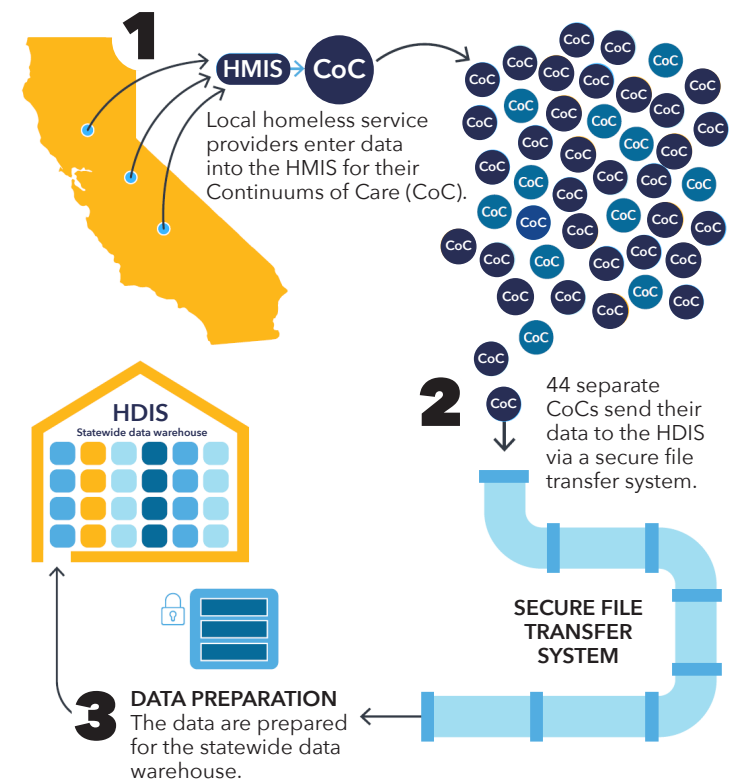




Table 1: One Report to Rule Them All

REPORT	REPORT CONTENT
Point in Time (PIT) Count	<ul style="list-style-type: none"> • How many people are experiencing homelessness during a single night within the last 10 days of January. • For some communities, it is the most comprehensive count of people experiencing unsheltered homelessness. • Includes data from non-HMIS providers (i.e., faith-based organizations, victim services providers). • Reports data by race, ethnicity, gender, household type, and disabling conditions but not the intersectionality of these identities. • Trend data is available to show how these counts have changed over time.
Housing Inventory Count (HIC)	<ul style="list-style-type: none"> • How many beds and units are available and dedicated to serving people experiencing homelessness on the same night as the PIT count. • Reports how many people and households are housed by RRH providers on the night of the PIT count but doesn't show the community's RRH capacity. • Reports seasonal and overflow beds in operation on the night of the PIT count, as well as beds available with non-HMIS entities (i.e., faith-based organizations, victim services providers). • Specifically focuses on the beds and units that are dedicated to serving people experiencing homelessness (does not report on affordable housing beds and units).
Longitudinal Systems Analysis (LSA) and Stella P(erformance)	<ul style="list-style-type: none"> • How many households were served by the homeless response system (see programming specifications for which project types are included in the LSA). • How households accessed and navigated through the homeless response system. • How long households experience homelessness, how many households exit to permanent destinations, and how many households return to homelessness. • How the system performs relative to different household types and heads of household of different races and ethnicities. • How equitably (or not) households access different supports in the homeless response system (i.e., Emergency Shelter, Rapid Re-Housing, Permanent Supportive Housing).

REPORT	REPORT CONTENT
Coordinated Entry Prioritization List or By Name List	<ul style="list-style-type: none"> • Who is currently prioritized for housing in the community. • How long are people on the prioritization list and does this differ by identities such as race, ethnicity, gender, household type, etc. • How long it takes for households to go through the Coordinated Entry process (access --> referral --> housing enrollment --> housing placement) and are there differences by identities such as race, ethnicity, gender, household type, etc. • How many referrals are being denied, by whom, and why.
System Performance Measures (SPMs)	<ul style="list-style-type: none"> • Provides analysis on system performance at the individual person level, but does not currently include any disaggregation by race, ethnicity, gender, household type, etc. • SPMs contain information on how long people experience homelessness, how many people return to homelessness, how many people experience homelessness, how many people increase employment and income (CoC-funded projects only), how many people experience homelessness for the first time, how many people exit to successful destinations from street outreach, how many people access or return permanent housing.
CoC Race and Ethnicity Analysis Tool	<ul style="list-style-type: none"> • Details disparities in who is counted during the PIT count, compared to data about the general population and the population of those in poverty.
Victim Services Provider (VSP) Data	<ul style="list-style-type: none"> • Communities have partnered with VSPs to receive aggregate-level data about people and households served by VSPs. • Aids in understanding if there are distinct differences in the demographics of people and households accessing the homeless response system and the VSP network.
Annual Performance Reports (APRs), Consolidated Annual Performance and Evaluation Reports (CAPERs), and other Project-Level Reports	<ul style="list-style-type: none"> • Shows performance at the project-level, but typically does not disaggregate performance measures by race, ethnicity, gender, household type, etc. or the intersectionality of these identities. • Can be used to pinpoint performance issues at the project-level that are feeding into larger system-level performance.

In addition to reports, there are other types of data that can assist communities in understanding their homeless response system and the disparities that exist within it.

Table 2: Other types of data that can assist communities in understanding homelessness

DATA	DATA CONTENT
System Mapping	<ul style="list-style-type: none"> Shows how people and households navigate through the homeless response system (i.e., pathways). Maps out how the homeless response system functions. Begins to identify disparities in how people access and navigate through the homeless response system.
System Modeling	<ul style="list-style-type: none"> Shows how the homeless response system could operate, given an ideal world. Allows for innovation in the types of services available, based on what households need to resolve their housing crisis. Provides a dollar amount to create the ideal homeless response system, one that can be messaged to funders, local political entities, etc. to advocate for support for the homeless response system.
Non-Homeless Data	<ul style="list-style-type: none"> Depending on the data set, could be used to analyze the homeless response system for disproportionality (similar to how the ACS data is used for the CoC race and ethnicity analysis tool). Could also be used to understand what other systems and institutions the people accessing the homeless response system are found in, which can then be used to advocate for closer collaboration and partnership with those systems and institutions. Could be used to understand “vulnerability” at the local level and help communities refine their Coordinated Entry assessment and prioritization processes.
Qualitative Data	<ul style="list-style-type: none"> Quantitative (numbers) data is important, but the qualitative (story behind the data) data is necessary to understand why. Quantitative = What, Qualitative = Why. Helps to contextualize the data and begin to understand why disparities exist. Is critical in continuous quality improvement process and identifying when strategies to address disparities aren’t working (and when they are working). <div style="display: flex; justify-content: space-around; align-items: center; margin-top: 20px;"> <div style="text-align: center;">  <p>Quantitative = What</p> </div> <div style="text-align: center;">  <p>Qualitative = Why</p> </div> </div>

Advanced Data Analysis: Targeted Universalism

[Targeted Universalism](#) is a framework from which communities can understand their homeless response system, the inequities that exist in their response to homelessness, and strategies that can be implemented to address those inequities. Targeted Universalism establishes a universal goal for everyone (e.g., reducing the length of time people experience homelessness in the homeless response system). It then analyzes how different groups are currently performing in relation to the goal of creating targeted strategies to move everyone closer to the universal goal.

Implementation strategies depend on how different groups are situated in relation to the universal goal and what barriers or lack of support they experience in achieving the goal. There are five steps in a Targeted Universalism framework.

Figure 3: Five steps in a Targeted Universalism framework



1. Establish a universal goal, based upon **community priorities, and needs.** This could be as broad as “work with households to obtain and maintain housing” or it can be more targeted, such as “reduce the length of time households are experiencing homelessness.”

A. As an example, let us establish a universal goal of reducing the length of time people experience homelessness in our homeless response system.

2. Assess general population performance relative to the universal goal. This is where we review and analyze the data to understand how the whole is doing in relation to the universal goal. Taking the universal goal of reducing the length of time people experience homelessness, we would look at the average across our system, which could be the System Performance Measure or the Stella P measure that looks at the length of time experiencing homelessness.

B. In our example, we will say that the overall average time that people experience homelessness in the homeless response system is 100 days.

3. Identify different performance levels between the goal and the overall population. This is where we understand how different groups are performing in relation to the universal goal. Rather than looking at the length of time one group is experiencing homelessness compared with another group (e.g., how long Black people are experiencing homelessness compared with how long Hispanic or Latino/a/e/x people are experiencing homelessness), we look at the length of time each group is experiencing homelessness in relation to the universal goal and overall average (e.g., how long Black people are experiencing homelessness compared with the systemwide measure found in Step 2). This approach to understanding the performance of different groups can highlight both groups that are doing worse than the universal measure, as well as groups that are doing better. Understanding group performance in this manner also can identify both barriers and lack of support for different groups regarding the achievement of the universal goal.

C. In our example, we find that American Indian/Alaska Native people experience homelessness for an average of 200 days (100 days longer than the systemwide average of 100 days) and Asian people experience homelessness for an average of 50 days (50 days shorter than the systemwide average of 100 days).

4. Assess and understand structures that support or impede each group from achieving the universal goal. This will involve a deep dive into understanding the “why” or the story behind the data. It will include qualitative information to understand the experience of members from the various groups. The information gathered here will help inform both the data found in Step 3 and the strategies for development and implementation in Step 5.

D. In our example, we facilitate interviews with American Indian/Alaska Native people in our system. Through these interviews, we learn that the

local Tribe has a banking and lending system that provides services to its members; however, given Tribal sovereignty, this information is not shared with credit reporting companies. Because local rental applications require running credit scores from the three major credit reporting companies that do not have access to the Tribal lending system, many American Indian/Alaska Native individuals report having low or no credit scores, which is hurting their rental applications because many landlords are wary of renting to individuals with low or no credit scores. This has the effect of disproportionately affecting the time that these individuals experience homelessness. Additionally, through focus groups with Asian people, we learn that there is a robust community of Asian immigrants within the larger community that provides direct support and outreach to Asians experiencing homelessness, which reduces the amount of time they experience homelessness in our homeless response system.

5. Develop and implement

targeted strategies for each group to reach the universal goal.

Strategies to be implemented in this step will be a direct result of what is discovered in relation to barriers and lack of support for various groups in obtaining the universal goal. This could include both transactional and transformational changes, some of which will be easier to implement and some of which will be more sustainable over time and more impactful but take a longer period to implement.

E. In our example, we could work with landlords to accept other forms of credit (transactional strategy). We also could work at a higher level to shift away from using any type of credit as a screening point for rental applications (transformational strategy). Additionally, we could look at any lessons learned from the focus groups with Asian people and determine whether there are ways to replicate their success across the system to benefit other groups.

Part II. From Meaningful Engagement to Authentic Partnership

To eliminate homelessness and housing insecurity, it is important to ensure that the voices of people with lived experience are at the forefront of research, policy, advocacy, training, and collaboration. This can only take place through an established process that starts with [meaningful engagement](#) and develops into a deeper authentic partnership. When system planning is integrated through diverse engagement, individuals feel more included. Integrated engagement, in turn, provides welcoming spaces that offer individuals more opportunities to participate and express their thoughts, which can bring change and improve service delivery. The roadmap for Authentic Engagement should be framed in the following steps:

Figure 4: Five steps for Authentic Engagement



Develop an Action Plan for Engagement

To create an action plan, the community must understand what is and is not working when it comes to the engagement of People with Lived Experience and Expertise (PLEE; for the purposes of this document, we will use the PLEE acronym and encourage communities to ask individuals' preferences in being named when implementing discussions and engagement locally). This means digging into the survey results to uncover the CoC/organization's strengths and weaknesses and identify areas of improvement. If the engagement assessment feedback is not what is expected, do not fret. The goal of an assessment is not to make the CoC, or the organization look good but to help it do better. Therefore, one should focus more on the feedback received. Pay attention to any themes or patterns in the results. Use comments to put the results in context and identify the reasons for the responses to certain questions. In other words, use feedback as a roadmap for

moving forward. Once the organization has completed the assessment, it is time to decide where to focus their efforts. As a team, review the results and list key focus areas to explore further. These focus areas will be the starting point for brainstorming actionable takeaways. Where to focus efforts should be a group decision. This ensures greater investment and accountability regarding the final commitments. Start with two or three focus areas. Discuss priorities based on the level of impact that the driver will have and how much effort it will take realize improvement.



A few questions to consider:

- Which results could we improve with simple changes?
- Which questions have the greatest impact on engagement?
- Can any items be grouped under one theme?
- What were our weakest areas of feedback?

Next, create focus groups that include PLEE assigned to each target area identified. Ensure that you provide PLEE with the context, training, and tools necessary to be a productive member of the focus group; too often we involve PLEE to simply meet a requirement and do not use the opportunity to create authentic engagement. The focus groups will work together to discuss what may be affecting the feedback for each question, identify possible challenges in addressing those issues, and brainstorm solutions. This is an important step in developing a successful engagement action plan because feedback on an assessment question can only provide so many details. Bringing a team together to discuss what is happening will help target efforts more effectively.

Do not treat these focus groups like any normal meeting. Find ways to facilitate a creative and open dialogue that can challenge assumptions, incorporate diversity of thought, and reframe problems into opportunities (refer to [Appendix II: PLEE Action Plan](#)).



When conducting the focus group, a simple way to document the discussion is to outline the following for each focus item:

- How do we struggle in this area?
- Why do we struggle in this area?
- What does our team or organization do to help or hurt this outcome?
- In an ideal future, how would this look different?

Next, translate those ideas into takeaways. Review the discussion notes and start brainstorming ideas on how to improve each focus area. List as many ideas as possible, then discuss which ones the group likes best. This should result in at least a few possible solutions to act upon.



Now that the CoC or the organization has identified the top solutions, it is time to commit to implementing the engagement action plan. This is a crucial step because team members' accountability will be required to see a long-term impact on engagement.

Without clear commitment and accountability, most people's efforts dissipate over time as they lose motivation or get distracted by other priorities throughout the year.

As the action plan is defined, be sure to include the specific actions to which people are committed:



- Who is responsible?
- What are the due dates and timelines?
- How will success be measured?
- What is the timeline for progress reports?

Ensure that the plan does not falter by clearly outlining the action steps and who is accountable for the results.



Establish a Flexible Compensation Policy

Compensating PLEE is crucial for several reasons. First, many PLEE are economically disadvantaged and financial need is a key barrier to engagement. PLEE partnerships provide work that demonstrably improves the relevance, effectiveness, and accessibility of programs and services. Expecting PLEE to work on a volunteer basis, or providing compensation that does not sufficiently recognize the time and expertise that peers contribute, can result in the exclusion of many PLEE from this work, especially those who face multiple intersecting barriers.

Not providing compensation, or providing compensation that is insufficient, means that only the most privileged voices of PLEE are likely to be heard, while those who are the most disadvantaged are prevented from accessing the potential benefits of engagement work.

Appropriate PLEE compensation enables the participation of broadly diverse individuals, which enhances the beneficial impact of engagement on programs and services. In this sense, compensation can be thought of as an investment in people and communities.

Compensating PLEE appropriately—which includes fair payment, opportunities for capacity-building, and potential bridges to employment—is a direct means of combating economic marginalization. Secondly, the



appropriate compensation of PLEE helps to reduce stigma and build social equity because compensating PLEE for their work recognizes their humanity, values their work, respects their dignity, and emphasizes their equality with other workers. The stigmatization of PLEE can push them to live at the margins of society, and many PLEE are vilified due to their lived experiences. Their human dignity may not be recognized often by the wider public. Providing appropriate compensation helps to shift from dominant narratives surrounding marginalized people, which call for “charity” from people with more resources, to an interconnected and strengths-based narrative that centers on the mutually beneficial contributions of all people. Appropriate compensation can validate peers’ knowledge and expertise, reduce isolation, and improve capacity, which ultimately can enhance self-esteem and self-efficacy. To ensure that PLEE who face financial barriers have equal opportunity to share their wisdom in collective work, organizations should “level the playing field” by providing financial compensation for peer work.

Compensation is also symbolic because it recognizes the value of peers’ contributions and expertise, which can positively impact a sense of self-worth and mental health. Because lived experiences should be valued as much as professional accreditation and education, PLEE who share their lived expertise should be compensated equally to organizational staff. Compensation should correspond to the time given, plus any costs incurred by the peer as a result of their work. Expecting PLEE to “volunteer” or failing to compensate peers fairly can be exploitative, particularly in the context of marginalization and systemic vulnerability. Furthermore, because financial barriers are accompanied by social stigma, it is recommended that organizations adopt a trauma-informed approach to providing compensation to PLEE. Trauma-informed approaches to compensation include such practices as never requiring PLEE to justify the barriers they face or their level of need when negotiating or receiving compensation.

A practically oriented set of guidelines specific to best practices for PLEE compensation can include, but is not limited to, the following:

1. **Discuss payment upfront:** It is recommended that the compensation of peers be thoughtful, transparent, and negotiated clearly with peers before the start of engagement.
2. **Discussions** about compensation should be individual, confidential, respectful, and sensitive.
3. **It is crucial that peers have all the details** about the payment process that they need prior to making decisions about opportunities for engagement.
4. **Expectations for a specific role**, including a minimum and maximum number of hours for the engagement and payment amounts, should be shared, discussed, and agreed upon upfront if flexibility allows. Other details that need to be discussed upfront include how to pay, the best time to pay, any other expenses that will be covered, and any relevant legal implications.
5. **Communicate with PLEE upfront** if they might not be able to expect similar payment for engagement in the future (e.g., due to precarious organizational funding).
6. **To facilitate these conversations, organizations should identify any barriers** within their organizations specific to the provision of compensation (e.g., staff capacity, staff attitudes toward compensation).
7. **Organizations should have all processes** required for timely, consistent, and respectful compensation in place before the organization begins the recruitment and discussion process to ensure that any details of payment that are discussed are feasible and familiar to all staff who are involved.
 - a. For example, financial policies, procedures, and a budget specific to their engagement work should be created in advance.
8. **It is considered the “gold standard” to financially compensate PLEE** for their work in alignment with professional compensation for similar work. Always pay PLEE for the minimum number of hours plus any time they have worked beyond the minimum. If engagements are less than 1 hour in length, payment for a full hour should be made. Recommended payment amounts are as follows:
 - Advisory role (e.g., meeting, focus group, document review): \$50 per hour
 - Presentation, facilitation: \$150 per hour



Provide options: For work that goes beyond a one-time engagement, it is best to ask peers when and how they would prefer to be paid. Options may include being paid after work is completed, receiving part of the total payment before and after work is completed (e.g., half before, half after), receiving a lump sum or spreading payment out over time, or being paid in part with cash and in part by check. Providing options for payment also may include allowing PLEE to choose their preferred form of compensation (e.g., cash gift card, electronic payment, check).

Pay in cash (usually the first choice): Paying PLEE strictly with gift cards (e.g., restaurant, grocery store, retail store) can be patronizing, stigmatizing, and/or insulting because gift cards dictate where peers can and cannot spend their money and suggest that they would otherwise spend their money “irresponsibly.” Gift cards also presume that



someone has access to the infrastructure required in order to meet needs in a particular manner. For example, PLEE may not have a refrigerator, rendering grocery store cards worthless. When engagement work is short-term, cash provided directly to PLEE is generally preferred, unless specifically requested otherwise. Paying in cash (e.g., cash gift cards such as Visa, Mastercard) instead of by check is often recommended because some PLEE may not have a bank account or identification.

Organizations should ensure that there is a private, discreet space where PLEE can be paid and pay them privately whenever possible. Do not provide PLEE with payment in the presence of others who are not receiving payment because this can be uncomfortable and create “insider-outside” tensions. Cash may not be appropriate under certain circumstances. If PLEE request payment by check, organizations should provide a realistic timeline for when PLEE can expect to receive payment. For PLEE without bank accounts who cash checks, add the amount of any applicable user fees to the payment. For PLEE who live in other locations, e-transfer may be acceptable; however, it is best to work directly with PLEE to find the best method of providing them with cash in these cases. If PLEE engagement is longer term, cash payment may not be appropriate, and it may make PLEE ineligible for the benefits they might receive if their work was classified as an employment relationship.

In these cases, consider employment or a contract and discuss options for a payroll upfront. Ensuring that cash payment is possible and that it can be done smoothly in a timely manner requires organizations to develop a process for cash payments with their finance staff. Long lead times for cash payment can require staff to pay PLEE out-of-pocket and be reimbursed, which is not recommended. A payment form should be developed by the organization to track payments, PLEE should sign the form when they receive payment, and forms should be retained by the organization to ensure proper recordkeeping.



Provide Ongoing Training and Support

To ensure equitable access and full accessibility for the newly established partnership, the CoC and the organization must provide ongoing training and support in collaboration with PLEE. Providing ongoing assistance to PLEE will help them better understand how to implement a successful engagement initiative. Training and other forms of assistance demonstrate to individuals how to ensure that the engagement is strengths-based; minimizes trauma and adversity; incorporates cultural humility; and ensures that the engagement did not perpetuate inequities, exploitation, or disparities. For example,

the CoC and the organization can host a PLEE support group for its lived experience experts to provide support to one another. Types of training and support can include PLEE support for engaged people with lived experience; forums for open, honest exchange; and training for team members to enhance critical skills such as active listening.

Creating internal policies that mandate the engagement of PLEE helps reinforce and normalize this practice and provides strong justification for organizations to devote resources to supporting lived experience engagements. Formal written policies also help establish lived expertise as a professional experience, create requirements for lived experience in job descriptions, and ensure that individuals are compensated for sharing their expertise. Written procedures help standardize practices to ensure that these engagements of PLEE are meaningful, authentic, and intentional.



Create a Continual Feedback Loop Process for Quality Improvement

Giving and receiving feedback is an essential practice in any process; however, the effort is insufficient if there are not systems created for continuous feedback. Partners and collaborators need to clearly understand their contributions to the initiative's goals and ensure that they are aligning themselves for their desired opportunities and growth. This is where creating systems of continuous feedback helps everyone get into the habit of sharing regular constructive feedback with group and team members in a structured manner.

Implementing systems for continuous feedback will support the initiative's productivity, boost engagement and retention, encourage learning and development, boost trust, and help create a positive culture in the partnership. This step is critical to sustaining lived experience engagement efforts. By creating feedback loops to inform practice, including seeking input from PLEE who were engaged with an initiative, agencies learned and evolved strategies over time to support the engagements, allowing them to be more effective and mutually beneficial over time.

The best practices for creating a system of continuous feedback include the following:

- **Set recurring feedback meetings:** Setting recurring feedback meetings in a structured manner can create effective systems of continuous feedback. These meetings—whether they are weekly, biweekly, or monthly—can include an entire team or an individual or implement feedback into weekly or biweekly one-on-one meetings. In these meetings,



PLEE can raise any questions they may have, discuss team issues, work to solve roadblocks or challenges they are experiencing, and check in regarding the progress of their to-do lists or priorities. These recurring meetings will ensure that everyone feels aligned and prepared to tackle their responsibilities.

- **Use technology as an advantage:** Without leveraging technology, systems of feedback require too much upkeep and manual work and, therefore, are not sustainable over the long term. To make the process easier, use a tool that allows for the exchange of feedback through a user-friendly app.
- **Be transparent** about the benefits of continuous feedback.
- **Set clear goals and expectations:** Be sure to set clear goals and expectations for individual goals. This will help ensure that the initiative is on track to achieving its desired results and ensure the success of each PLEE.

- **Make feedback anonymous:** Making feedback anonymous in one or some of the systems of feedback is extremely effective because it makes participants feel safe, and as a result, people may be more honest with regard to sharing feedback that would be difficult to discuss in person. Establishing this process can make an individual feel sufficiently comfortable to provide genuine remarks or suggestions that can benefit the system and implement the necessary changes.



Integrate PLEE into the workforce, board of directors, system planning workgroup, and other places where decisions are made.

Employing PLEE can help embed lived experience perspectives into the work of homeless services. Organizations can institutionalize the practice of engaging PLEE, in part, by recruiting, hiring, and retaining diverse groups of individuals with lived experience. Hiring individuals with diverse lived experience can help ensure that organizations do not exclude the perspectives of people who have historically been underserved by federal programs and policies. This work also must include providing support through supervision, coaching, and mentoring. Organizations also must seek to directly engage these individuals in other capacities, including as interns, consultants, contractors, and partners, which will result in creating a workforce that includes PLEE as partners in the work. Organizations can accomplish this by making lived experience a requirement for employment, where possible, acknowledging the importance of lived experience in job postings, or encouraging partners to hire PLEE. In doing so, organizations can create a more inclusive and diverse workforce with broader capabilities to dismantle structural inequities. Below are various roles in which PLEE can be engaged:

Storytellers

Organizations can engage PLEE by creating opportunities for storytelling, including listening sessions, public testimony, interviews, focus groups, and digital formats (e.g., videos). Storytelling may hold important cultural significance for some priority populations and highlight the differences that some groups experience with different government systems.

Advisors

PLEE commonly served as advisors, often through groups, committees, and boards, for initiatives that develop national strategies, congressional reports, policy recommendations, and capacity-building efforts.

Subrecipients

Subrecipients can use federal agency funding to engage PLEE to inform the design and implementation of their work as a primary means to make policy and practice improvements.

Partners

PLEE can serve as engaged partners to provide training, technical assistance, and consultation and to develop materials to support initiatives, such as guidance, model policies, position papers, and white papers. While they made similar contributions to staff, partners are external to the CoC or organization. Unlike advisors, who are typically individuals who worked with agencies, partners can be organizations comprised of PLEE that collaborated with federal programs and connected them to communities (e.g., the National Coalition of Homelessness Speakers Bureau located in Washington, D.C.).

Staff

Organizations should hire PLEE as staff who bring valuable expertise and perspective to the work. Staff roles can include all aspects of work, according to the role and position, including training, grant monitoring, ongoing consultation, coordination of discrete projects, and mentoring and coaching other staff on working with and collaborating with PLEE.

Part III. Tribal Nations

Native and Indigenous peoples and their history in California dates back thousands of years. There are currently 109 federally recognized Tribal Nations and 65 Tribes in the State of California, making California home to more Native American residents than any other State in the United States. A “Tribe” is considered a sociopolitical entity with its own cultural sphere where people are connected by language, culture, and traditions. There is incredible cultural diversity among the Tribal Nations, Tribal Communities, and Tribally Designated Housing Entities (TDHE) (collectively referred to as “Tribal Communities” for the purposes of this document) in California, each with their own history, culture, and governing body.

It is important to remember that, traditionally, the history that has been taught and written by non-Indigenous peoples does not adequately reflect the atrocities experienced by Native and Indigenous peoples.

Allies must actively work to recognize and address the structural racism and barriers that exist and negatively affect Native and Indigenous peoples.

To address the housing needs of Native American Tribes, the California Legislature passed [Assembly Bill 1010](#) in 2019. This requires California HCD to meaningfully address access and the participation of Tribal Nations and Tribes to HCD funding programs. Assembly Bill 1010 created the pathway for California HCD to support, provide training and technical assistance, remove barriers, and fund Tribal Communities.

ESG subrecipients and sub-subrecipients are encouraged to practice responsible engagement when collaborating with Tribal Communities in their area. Developing and practicing effective communication is critical to building trust and collaborative relationships with Tribal Communities. Communication is culturally shaped and, therefore, staff should consider the following practices when collaborating with Tribal Communities:





- Seek education on the histories and cultures of the Tribal Nations and Tribes and examine whether the organization has any previous experience in collaborating with Tribal Communities before starting the outreach.
- When arranging meetings, ask for the Tribal Community's preference regarding the setting of the meeting (virtual or in-person). If a meeting takes place in a virtual setting where video is an option, make sure to be on camera the entire time.
- Be transparent with the Tribal Community about knowledge of Tribal history and culture.
- Ask how to address a representative of a Tribal Nation, Tribe, TDHE (e.g., Chairperson, Tribal Administrator, Vice-Chair).
- During meetings with the Tribal Community, use clear language (minimize acronyms), be clear on roles and responsibilities, practice active listening, be mindful of tone and words, and summarize the main action items at the end of the meeting.
- Learn how to "read the room" by understanding the meaning of silence and body language.
- Establish and adhere to confidentiality practices.
- Always show respect and compassion and share personal experiences only.

California HCD also has created the Tribal Nations Engagement Toolkit that subrecipients can refer to for additional education and support. The Tribal Nations Engagement Toolkit explains why engagement with Tribal Nations matters and provides additional information on Tribal Nations' background and history, how to create an authentic partnership with Tribal Nations, homelessness among Native and Indigenous peoples, resources, and more.

Part IV. Advancing Equity Through Procurement

Current structures and power dynamics in homeless response systems perpetuate racial inequity. State government agencies, legislators, historically funded institutions, lobbyists, historically funded communities, and the media heavily influence policy and funding decisions, often creating a power imbalance. One way to right-size such power imbalances is to support historically underfunded communities and culturally specific organizations through procurement.

“Culturally specific organizations are created by and for people of a specific racial or ethnic identity group and are accountable to that community. People from that group serve on the board and in leadership positions—roles that hold the most power and influence in deciding on an organization’s priorities, direction, and practices. Culturally specific organizations systematically embed community norms and practices throughout their visions, operations, governance,

management, and community engagement. Because they are centered and informed by the experiences of that group, culturally specific organizations are often best positioned to meet the goals, challenges, and hopes of a particular identity group.”⁶

“Culturally specific organizations systematically embed community norms and practices throughout their visions, operations, governance, management, and community engagement.”

CoCs are required to provide public invitations for new members to join at least annually and have an inclusive structure and participation from a variety of organizations, including those led by and serving culturally specific communities experiencing homelessness. CoCs should consider the following steps to advance equity through procurement at the local level:

- **Understand Provider and Geographic Gaps.** Based on the information gathered during the data analysis outlined in [Part I](#), gather provider and geographic information to understand (1) what services are being provided to individuals who are disproportionately represented in homelessness, (2) which areas in the CoC provider organizations are servicing them, and (3) the composition of provider organizations.
- **Establish Procurement Goals.** Create explicit goals for procurement to (1) expand contracts to a larger number of culturally specific organizations, (2) increase the CoC’s geographic reach, and (3) increase program enrollments for people who are disproportionately likely to experience homelessness.
- Procurement often has barriers for smaller organizations that have limited capacity and resources. Consider reducing or eliminating barriers to the procurement process: **Use plain language to describe services and avoid jargon.**
- **Divide services** so that smaller organizations can remain competitive.
- **Ensure that pre-bidder conferences are held** to explain the process, answer questions, provide clarification, and provide follow-up communication channels throughout the process.
- **Support subcontract relationships with larger organizations** that are already established.



⁶[How to Define Your Organization’s Identity - Inatai Foundation](#)

Part V. Call to Action

The following action items should be considered by subrecipients and sub-subrecipients for adoption and implementation of equity-oriented practices. Consider the following concrete and practical strategies as the community advances equity.

Strategies for adoption and implementation of equity-oriented practices



Create Open Dialogues

- Begin an open dialogue about racial equity in your community.
- Strive to create an open and supportive environment for all voices to be heard.
- Create meaningful outreach and engagement to underserved and minoritized populations in your community.



Analyze the Data

- Analyze your existing data sources: What do they tell you about racial equity in your community?
- What is missing from your data to create a complete analysis of racial equity?
- Leverage the CoC Racial Equity Tool or Targeted Universalism model to complete data analysis.



Engage with Persons with Lived Homelessness Experience

- Begin meaningful engagement with PLEE at all levels (program and system).
- Ensure authentic engagement through support and training for PLEE as they enter a complex system of care.
- Compensate PLEE in a manner consistent with their specific circumstances.



Participate in Meaningful and Authentic Engagement

- Begin meaningful engagement with Tribal Nations connected to your community and do your homework to assure culturally appropriate engagement.
- Ensure authentic engagement through deliberate asks: Join the CoC board, become a CoC program applicant, connect to CoC-wide services.



Support Atypical Community Partners

- When procuring services and programs deliberately reach out to atypical community partners that further racial equity.
- Provide education and support to atypical community partners and embed racial equity in existing services and programs.

Part VI. Frameworks and Resources

Below is a list of frameworks related to racial equity and anti-racism. This list is not exhaustive but should increase the community's understanding of racial equity through exposure to additional perspectives and frameworks. Each source below includes a brief synopsis and a hyperlink to the resource. Many of these sources also include additional links that can lead to additional exploration.

[Race Forward, Government Alliance on Race and Equity, Anja Rudiger \(Ph.D\), GARE Advancing Racial Equity - A Framework for Federal Agencies](#)

- A framework for advancing racial equity in the Federal Government focusing on the four components below:
 - Visualizing change: Lead with values and vision
 - Normalizing: Build a shared understanding and analysis
 - Organizing: Build external, internal, and cross-agency networks
 - Operationalizing: Use a systematic process and racial equity tools

[Center for the Study of Social Policy \(CSSP\), Using an Anti-Racist Intersectional Frame at CSSP](#)

- CSSP adopted an anti-racist intersectional framework that explicitly calls out white supremacy and other forms of oppression while recognizing that these forms of oppression are not fully understood without considering the intersection of people's identities and the ways in which each identity can be further discriminated against.

[Race Forward, Government Alliance on Race and Equality, Julie Nelson and Lisa Brooks, Racial Equity Toolkit: An Opportunity to Operationalize Equity](#)

- This toolkit, which is meant for government staff, elected officials, and community-based organizations, helps the user operationalize equity by analyzing policies and programs using a short list of questions and the resources provided.

[New York City \(NYC\) Department of Health, A Guide to Using the Community Engagement Framework](#)

- This framework focuses on community engagement as an avenue

to increase health equity. The NYC Department of Health breaks community engagement into four categories and provides examples of how to implement them.

[Homelessness Policy Research Institute, Research Agenda: Moving Toward an Anti-Racist System for Ending and Preventing Homelessness in Los Angeles](#)

- This short report lays out a research framework used by the Homelessness Policy Research Institute to increase the knowledge base and understanding of the ways in which racism hinders the ending and preventing of homelessness in Los Angeles, CA. The report lays out research objectives and accompanying strategies and research questions.

[Urban Institute, Building a Housing Justice Framework, Bill Pitkin, Katharine Elder, and Danielle DeRuiter-Williams](#)

- As of this report's writing, the Urban Institute defined "housing justice" as "Increasing access to safe, affordable housing and promoting wealth-building by confronting historical and ongoing harms and disparities caused by structural racism." The report lays out key principles related to this working definition and provides examples for how to apply these principles through different policies and program areas.

[COVID-19 Homeless System Response: 5 Tips to Approaching Rehousing with Racial Equity \(hudexchange.info\)](#)

- This resource offers brief guidance for rethinking rehousing strategy with racial equity front and center and includes a number of additional helpful links and resources.

Appendix I: Glossary

The following definitions were taken from a variety of sources, all listed at the end of this document, and many were adapted to be more accessible. Citations are included only for those definitions that were unique or taken from a recognized entity or individual recognized in the field. We appreciate and thank the many folks who continue to wrestle with the language of racial equity.

Table 3: Glossary

TERM	DEFINITION
Disparity	A significant economic, social, racial, or cultural difference.
Diversity	All the ways in which people differ, including race, ethnicity, gender, age, national origin, religion, disability, sexual orientation, socioeconomic status, education, and so forth.
Equity	Providing varied levels of support based on an individual's or group's needs to achieve fairness in outcomes.
Ethnicity	Shared culture and language. It is distinct from, but may overlap, race.
Inclusion	Bringing traditionally excluded groups or individuals into processes and activities in a way that values their participation. ¹
Intersectionality	How overlapping vulnerabilities, such as race, class, gender, sexual orientation, ability status, and so forth ... create specific challenges for individuals. ²
Race	A social and political construction—with no genetic or biological basis—used to arbitrarily categorize and divide groups of individuals based on physical appearance (particularly skin color), ancestry, cultural history, and ethnic classification. ³
Racial Equity	When a person's race does not predict their opportunities and outcomes.

¹Racial Equity Tools Glossary, <https://www.racialequitytools.org/glossary>

²Racial Equity Tools Glossary, <https://www.racialequitytools.org/glossary>

³Center for the Study of Social Policy, Key Equity Terms & Concepts: A Glossary for Shared Understanding, <https://cssp.org/wp-content/uploads/2019/09/Key-Equity-Terms-and-Concepts-vol1.pdf>

Appendix II: People With Lived Experience and Expertise Action Plan

Directions:

- Develop community goals based on the brainstorming template. Remember that goals do not have to progress all the way to best practices. Focus on goals that move incrementally toward the end goal.
- There is no expectation that there will be exactly five goals. Focus on developing goals that are meaningful and are likely to be accomplished.
- Action Steps are the necessary actions to accomplish the goal.
- Assigned To is the person who will lead each action step.
- Entities are other people who need to be involved in the action step but are not leading it.
- Remember that PLEE should always be included in both leadership and stakeholders.
- Desired Outcome tracks that the action step has been successfully achieved.
- Resources Needed should include both the monetary and non-monetary resources needed to accomplish the action step.
- Timeline is not a deadline; it is the approximate order and priority in which the action steps should be accomplished to meet the goal.

GOAL 1:					
Action Steps	Assigned To	Entities	Desired Outcome	Resources Needed	Timeline
Notes:					

GOAL 2:

Action Steps	Assigned To	Entities	Desired Outcome	Resources Needed	Timeline

Notes:

GOAL 3:

Action Steps	Assigned To	Entities	Desired Outcome	Resources Needed	Timeline

Notes:

GOAL 4:

Action Steps	Assigned To	Entities	Desired Outcome	Resources Needed	Timeline

Notes:

GOAL 5:

Action Steps	Assigned To	Entities	Desired Outcome	Resources Needed	Timeline

Notes: