



## Equity in the Thomas Jefferson Planning District Commission

Investigating Strategies for Greater Inclusion  
and Fairness.

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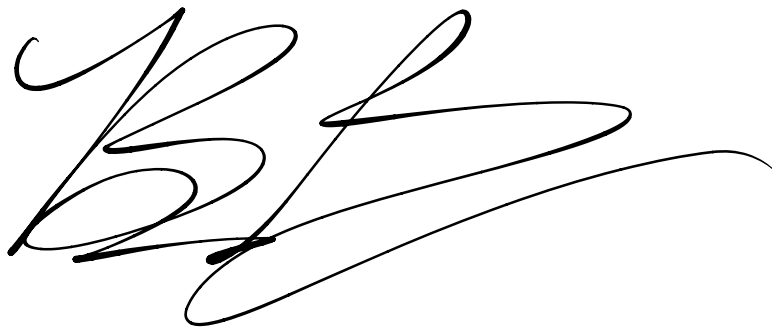
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Equity Definitions and Acronyms

**Equity** is defined as “fair treatment, access, opportunity, and advancement for all people, while at the same time striving to identify and eliminate barriers that have prevented the full participation of some groups. To improve equity, we must increase justice and fairness within the procedures and processes of institutions or systems, as well as their distribution of resources. Tackling equity issues requires an understanding of the root causes of outcome disparities within our society” (Code for America, n.d.). It is often associated with identifying racial disparities; however, it also encompasses other factors that could potentially lead to identifying disparities in access, resources, opportunities, and outcomes. Factors like: gender and gender identity, socio-economic status, age, disabilities, religion, and nation of origin are all influenced by equity initiatives (Minow, 2021).

**Equity action plans** establish mission goals to promote equity, diversity, and inclusion within organizations and society. These programs involve identifying areas where inequalities and bias exist. They establish metrics to monitor the progress to ensure deliverables are achieved.

**Disadvantaged Communities**, based on the January 27, 2021, Executive Order 14008 from President Biden, are communities that have been “historically marginalized and overburdened” by systemic policies and law (Executive Office of the President, 2021). These areas usually consist of low-income and minority communities that have been neglected compared to communities that have seen continued development and growth.

APA	American Planning Association
CCRPC	Chittenden County Regional Planning Commission
DEI	Diversity, Equity, and Inclusion
PDC	Planning District Commission
RVA	Richmond Virginia
TJPDC	Thomas Jefferson Planning District Commission

## Executive Summary

The Thomas Jefferson Planning District Commission (TJPDC) seeks to improve its equity goals to promote a more impactful and equitable approach to policymaking for the 10th planning district of Virginia. Since President Biden’s 2020 executive order, using equity as a measurement criterion has effectively identified deeply embedded inequitable policies within federal and state systems. In 2020 and 2021, the previous Democratic governor of Virginia, Gov. Northam, established a commission to identify terminology and policies that perpetuate the inequalities within state policy (Schnieder, 2022). The commission returned both times with data that identified growing racial, rural, economic, and environmental inequalities directly from historic policies (Commission to Examine Racial & Economic Inequity in the Law, 2022). The report stated there was obvious evidence of a “legacy of centuries of targeted and specific racial discrimination and oppression.” It recommended codifying a racial equity commission to establish a standard of including a “racial equity impact” assessment as a part of any legislative process (Schnieder, 2022).

The TJPDC is committed to creating equitable policy initiatives that increase internal and external equity engagement with stakeholders. However, due to limited funding and resources, the organization has been unable to commit to equity improvements in any capacity. This report will provide the TJPDC with an analysis and recommendation regarding current actions and research to promote equity programs. The three policy alternatives proposed in this report are:

1. Status Quo;
  2. Consultant Research;
  3. Internal Equity Initiatives

Each policy alternative is weighted against an evaluative criterion to assess its likelihood of implementation. The criteria are ranked with different percentages of weight to provide context for which criteria will have a greater impact on the likelihood of implementation. Each alternative will consider the following criteria: 1) Costs; 2) Equity; 3) Political Feasibility; and 4) Administrative Feasibility.

This report will quantify outcomes for financial costs and utilize qualitative metrics for the other three criteria. The final recommendation will select an alternative that scored the highest average among the four criteria.



This report will quantify outcomes for financial costs and utilize qualitative metrics for the other three criteria. The final recommendation will select an alternative with the highest average among the four criteria.

This report identifies alternative 3: *Internal Equity Initiatives* to be weighted as the alternative with the highest likelihood of successfully implementing equity programs for the TJPDC. Internal equity initiatives provide planning district commissions with increased internal equity, resources, and training, leading to future external equity improvements. Hiring an equity coordinator to lead these programs allows TJPDC staff to continue focusing on their assigned departments while the organization can focus on creating comprehensive equity action plans. The outcomes matrix at the end of **Policy Alternative** explains why this approach should be prioritized. Submatrices offer a clear breakdown of how each alternative earns its weight. Additional sources are in the **Appendix** and describe the calculations performed for identifying costs.

### Problem Statement

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Equity incorporated into planning helps disadvantaged communities recover from harmful systemic policies contributing to societal inequities. By identifying at-risk areas, specific policy action can be taken to create specialized action plans that address the needs of previously neglected communities. However, because equity considerations still need to be officially established as a part of the planning process, most counties overlook including it in their planning process. As of 2023, only three counties, the City of Charlottesville, Albemarle County, and Nelson County, have included equity as a consideration in their long-term Comprehensive Plans for outlining future goals for the counties. The City of Charlottesville represents the only urban locality that has published an equity framework and resilience plan that state that equity is a crucial factor to consider in future planning. Nelson County and Albemarle County are the only rural counties to include equity considerations, with Albemarle publishing its resilience plan. Nelson County mentions that the current plan “lacks any discussion or strategies” regarding implementing equity initiatives (Nelson County, 2022). Fluvanna, Louisa, and Greene County neglect to mention any deliverables that incorporate equity. Staffers for the TJPDC do not have the necessary training or time to incorporate equity considerations to assist their counties effectively or to improve their internal equity standards. Internal interviews with TJPDC staff reveal low levels of community engagement, which can reduce the effectiveness of the organization’s operations. **The lack of resources and funding, the presence of political opposition forces, and the inability to effectively engage with**

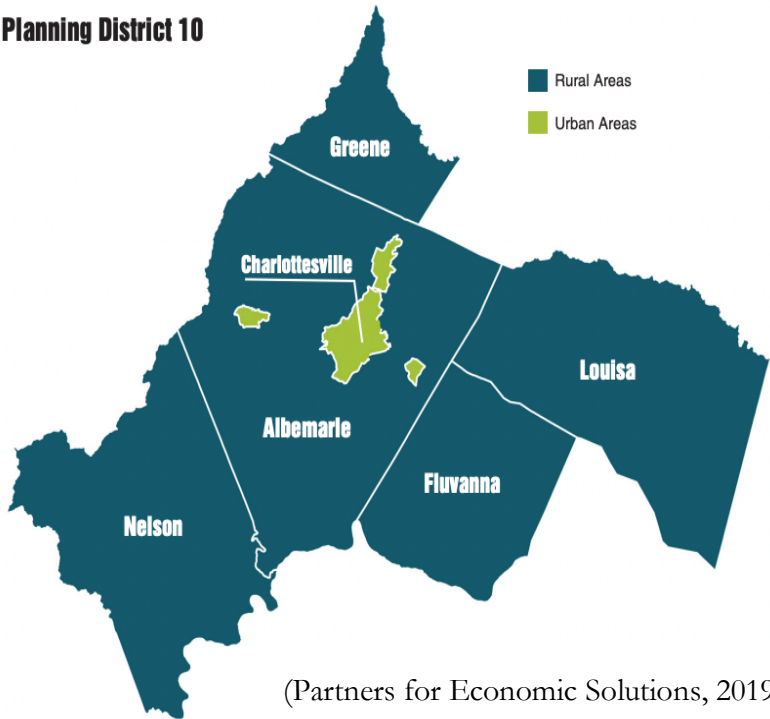
disadvantaged communities have threatened the ability of the TJPDC to implement effective internal and external equity initiatives for the region.

Policy Context and Client Overview

The Thomas Jefferson Planning District Commission (TJPDC) operates as a regional agency for six district counties in Virginia: The City of Charlottesville, Albemarle, Fluvanna, Greene, Nelson, and Louisa County (Figure 1). As an advisory 501(c)(3) organization, the TJPDC can only directly implement programs for its respective counties with approval from the board of commissioners and the executive director of the county office. The TJPDC’s role as the regional planning district commission (PDC) for the 10th planning district of Virginia is to create a strategic plan for the region that aligns with the goals and objectives of its various stakeholders (*Introduction to PDCs*, n.d.). In addition to regional tasks, the TJPDC assists county offices with achieving local county goals and formulating their 5-year comprehensive plan outlining future actions. Fluvanna County, for example, uses the TJPDC’s regional plans as the basis for its 2040 Comprehensive Plans (Fluvanna County, 2023). The TJPDC performs technical and administrative support on behalf of the counties to provide them with up-to-date data and policy suggestions.

The role of the TJPDC staffers will vary depending on which sector they are assigned: transportation, environment, housing, or community development. When developing plans, staffers will consider where and how they can create the most significant positive impacts within different communities; however, incorporating equity considerations is not a primary criteria factor. The extent that

Figure 1: The 10<sup>th</sup> Planning District of Virginia



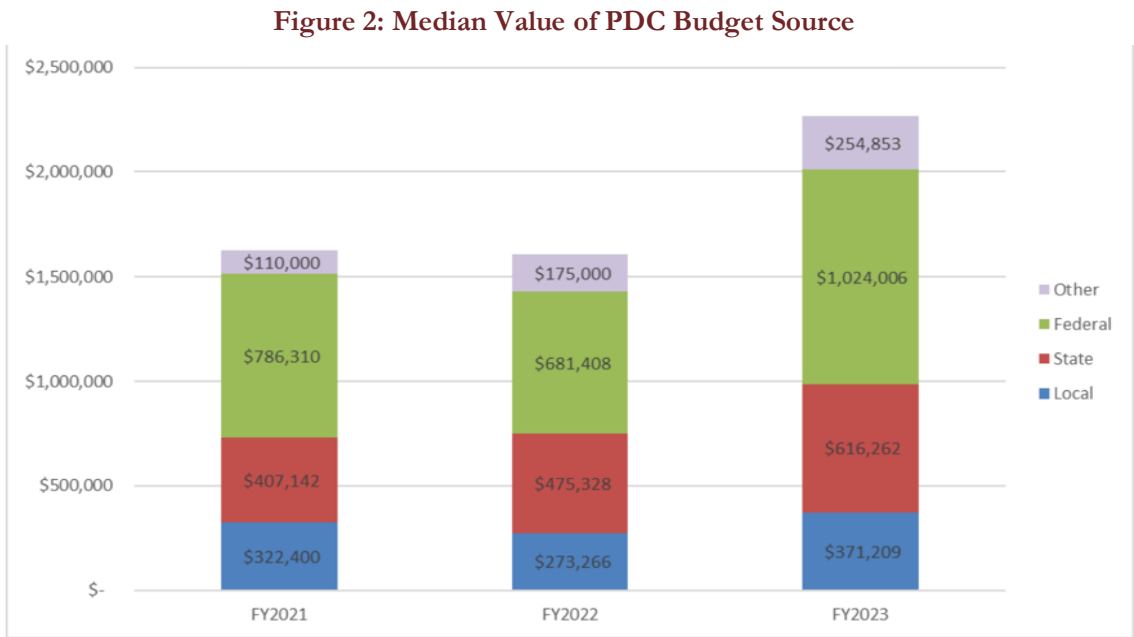
equity is implemented in TJPDC operations is through the mandatory Title VI Action Plan. The plan expresses the standards for incorporating demographic information, access to language services for Spanish speakers, and establishing non-discriminatory guidelines that all programs must abide by (TJPDC, 2022). To receive federal funding, the transportation sector is the only sector that requires incorporating equity considerations when creating plans like the Long Range Transportation Plan (LRTP) (TJPDC, 2022). The lack of equity initiatives has been reported to have a negative impact when attempting to engage with new external stakeholders. TJPDC staff have stated that the need for new community engagement has reduced their ability to incorporate voices previously neglected in the planning process effectively. The absence of an equity system reduces the PDC's ability to create programs that support and benefit at-risk communities effectively. As regional and state data portray increasing disparities among vulnerable communities, new equity considerations must be implemented in response. This report proposes meaningful policy alternatives that the TJPDC can utilize to realistically implement effective, equitable policies.

## Background

It is crucial to understand why equity programs have been neglected and why now is the opportune time for TJPDC to incorporate equity plans. Additionally, evaluating the current organizational structure and who would benefit the most from these programs provides context to why the proposed policy alternatives are the best step forward for the organization. Equity is still a new concept for many policy and planning organizations; using different examples of other PDCs successfully implementing equity plans provides helpful guidance and offers creative solutions that can be adapted to other planning agencies. This background reviews the recent emergence of equity in the policy sector, the growing regional disparities, and the potential costs to society if the status quo continues.

### Current Organizational Structure

Planning district commissions, like the Thomas Jefferson Planning District Commission, rely heavily on external support for funding from federal and state agencies, as expressed by Figure 2. They are responsible for providing a crucial link between the regional and local level of governance; however, the specific type of projects they can perform depends on the amount and type of grant they receive (*Authority - Planning District Commissions*, n.d.). During the 1960s, when PDCs were beginning to map out regional borders, these organizations’ goals were limited in scope. Most of the assignments



(DHCD, 2022).

revolved around public land and government planning (*History of the Virginia Planning District Commissions*, n.d.). Due to rapid economic and population growth in 1995, the Joint Legislative Audit and Review Commission (JLARC) issued a “Review of Regional Planning District Commissions in Virginia”; they identified that PDCs were vastly underutilized due to most of their responsibilities being “largely confined to the preparation of special purpose (e.g. wastewater, recreation, etc.) plans for member localities” (*History of the Virginia Planning District Commissions*, n.d.). This forced the federal government to abandon the PDC concept or reevaluate its role in regional governance. In the 1990s, federal funding was directed towards PDCs under the Regional Competitiveness Act. By 2003, between “\$20 and \$50 million in incentive funding was awarded to eight regional partnerships” (*History of the Virginia Planning District Commissions*, n.d.). Since then, PDCs have been given additional levels of freedom based on what type of support their region and respective localities require.

Currently, the TJPDC is active in multiple different sectors in service of the region, specifically: transportation, community work, housing, and the environment (TJPDC, n.d.). The amount of federal funding the organization receives is based on successful applications for federal grants. In the past five years, each sector has received different levels of funding support based on how much the agency determines is needed to accomplish the project’s goals. For example, the HOME consortium, a housing program that utilizes grant money from the Department of Housing and Urban Development (HUD), will receive a different amount each year based on the proposal to HUD (“Thomas Jefferson Regional HOME Consortium,” n.d.). TJPDC will then use the grant funding to achieve specific outcomes based on the data from their annual action plan and their 5-year consolidated plan. Staffers will be assigned defined responsibilities that offer few opportunities for working outside the established parameters set by the department’s regulations.

The TJPDC has a close working relationship with the six counties in their region. In pursuit of supporting local initiatives, the TJPDC provides policy and technical support at varying levels. For example, the PDC helps with long-range transportation projects for the region while also coordinating the paratransit program, JAUNT, to provide transit access for rural residents in the local counties (TJPDC, n.d.). All these programs are vital to the region’s infrastructure and require a full staff to manage their progress as they continue to grow consistently. However, because staffers are working at max capacity, the PDC cannot devote time to any new initiatives that have not been predetermined. As it stands, the TJPDC lacks equity measures for its internal and external programs. The only equity initiatives the TJPDC is responsible for maintaining are the Title VI plan and the equity analysis

conducted for federally funded transportation plans. No internal equity programs exist, despite support from staffers willing to learn more about new equitable policies. The TJPDC does offer some external equity programs included in the Title VI plan, like offering translation services for Spanish-speaking residents. However, the remainder of the plan acts primarily as general non-discriminatory guidelines that the PDC must abide by (TJPDC, 2022).

**The Status of Equity in Planning**

Equity has emerged recently in the policy arena and represents a shift to create new outcome-focused plans that specifically address communities that have been identified as historically disadvantaged. The term equity suggests a need to reevaluate the current systems and offer new policy approaches to combat the growing disparities in society (Minow, 2021). Equity gained the national spotlight after President Biden’s 2020 executive order calling for equity considerations to be implemented in all federal agencies (The White House, 2021). As the agencies developed these action plans, regional and local entities began investigating how to implement their own plans. Research into the benefits of including Diversity, Equity, and Inclusion (DEI) efforts increased, and DEI is now a common position in most organizations. In 2021, the LeadingAge LTSS at UMass Boston published a report describing the literature findings regarding equity programs to establish the benefits and recommendations for incorporating equity. The report states that incorporating DEI initiatives are vital for long-term success regardless of the organization’s purpose. Organizations that prioritize equity versus those that do not and identified an increase in profit, effectiveness, and overall performance in equity focused organizations (Hennessa & Bryant, 2021). DEI training is one of the most common practices performed by organizations that wish to become more effective and equitable agencies (Hennessa & Bryant, 2021). In 2023, equity initiatives are still not mandatory outside of the federal and state government. When reviewing the current level of equity present, many planning organizations are slow on the up-take or lack equity considerations entirely. Currently, there are movements to increase the awareness of these programs, like in 2021 when planners from over 20 cities rallied together to promote equity and issue a racial equity statement. They called “to collectively address racial equity issues in their practices and policies, with a commitment to change their work toward the goal of racially equitable communities in the future” (Bogdanowicz, 2021). This group formed a “Commitment to Change” road map that relies on a unified approach to addressing equity. It has seen support from organizations like the American Planning Association (APA) and the Lincoln

Institute of Land Policy, each of which has committed resources to further promoting equity in planning (Bogdanowicz, 2021).

APA reported that local county offices are doing the bare minimum in planning for equity at lower levels. This may be because equity was not conceptualized yet throughout most of the current planners' careers. A report titled "Are We Planning for Equity?" identified that many planning organizations are not using any equity considerations in policy planning and claimed that the average planner uses outdated resources for creating policy, like, *Urban Land Use Planning* by Berke and Kaiser, that lack any equity mentions. The unfamiliarity of dealing with equity has discouraged staffers from incorporating it into their work (Loh & Kim, 2021). APA used the state of Michigan as a case study to further understand where the disconnect for equity uptake exists and found that 42% of planning agencies' long-term plans had identified geographic areas with particular social needs, and 65% of the plans identified underserved groups and communities (Loh & Kim, 2021). Despite this, out of the 46% of the plans that mentioned equity at least once, only 6 out of the 22 plans included equity terminology and lacked specific deliverables and designated plans of action (Loh & Kim, 2021).

### **Increasing Levels of Disparities**

In 2019, the TJPDC collaborated with the consulting group Partners for Economic Solutions for the Comprehensive Regional Housing Study and Needs Assessment to identify housing inequities in the region. The report found that dated housing policies perpetuated a range of inequities that disproportionately affect rural, minority, and lower-income communities. Limiting their scope to the 10<sup>th</sup> planning district of Virginia, an estimated 9,000 rural and 2,000 urban residents pay more than 30% of their income on housing. By 2040, the report estimates that over 14,580 residents will be cost-burdened (Partners for Economic Solutions, 2019). Almost 5,000 households in the region pay over 50% of their income on housing, with 53% identified as extremely low-income households experiencing cost burdens. As rental rates continue to increase at a rate of 5.8%, those in the lowest income bracket continue to suffer at a higher rate. Trending data suggests that the current housing crisis will worsen unless additional actions are taken (Partners for Economic Solutions, 2019). The City of Charlottesville has recognized that the housing needs for low-income households are not being properly met and has committed to creating new zoning and planning changes. Incorporating additional factors like race into the analysis reveals minority households, specifically Black households, suffer disproportionately compared to white households. In Charlottesville, Black homeownership dropped by 24% while white homeownership increased by 20% from 2000 to 2018. As rent prices



increase, Black owners will continue to suffer at higher rates as the housing needs outweigh the housing supply (Charlottesville Low-Income Housing Coalition, 2020).

Data collected by the Virginia Department of Health and the MAPP2 Health Report reflect similar trends across most of Virginia. Only 66% of rural areas have access to broadband services compared to urban broadband access at 84%. Rural areas suffer from lack of adequate healthcare options disproportionately than urban areas, with rural areas reporting 45 avoidable hospitalizations per 1,000 residents compared to only 12 in urban areas (Virginia Rural Health Plan Working Group, 2022). The report provided potential alternatives to solve the problems, with most of the suggestions incorporating some type of equity consideration needed in future planning. Regional and local governments are taking action; however, current programs could be more effective at addressing these trends quickly enough.

**Potential Costs to Society**

The potential costs to society will depend on how successful the implementation is and the program’s scope. If the TJPDC cannot secure adequate external funding, then the program can be supported by billing out to the different departments. However, this reduces the effectiveness of the PDC because less funding will be available for the currently active projects. Many of these projects, like the HOME rehabilitation program, serve low-income residents and are essential to preventing these communities from worsening.

For Virginia, equity is a complicated topic. After the election of Gov. Youngkin, the term equity was conflated and misinterpreted as a leftist policy that would negatively affect Americans. Articles in popular conservative news sites like the Heritage Foundation reported that equity was an attack on equality and should be ignored at all levels (Gonzalez, 2021). Since 2021, Gov. Youngkin has been vocal about his opposition to equity programs, even removing the “E” from Diversity, Equity, and Inclusion and replacing it with “O” for opportunity. This campaign against equity seems stronger in areas that support Gov. Youngkin, mostly among populations that support right-leaning or conservative policies (Allen, 2022). As a result, equity has become a charged term that can potentially lead to heightened tensions and conflict.

Planning agencies can sometimes be well-intentioned with their actions but create more problems if the program is not fully developed. This remains one of the more critical consequential costs to society because it threatens future equity programs. Equity programs must be effective and produce more



desirable results to ensure support is maintained and their effectiveness. A good example of this is in 2018 when the City of Richmond developed a bus network redesign to create an equitable alternative for its residents. A 2023 equity analysis conducted by Virginia Commonwealth University found that the plan disproportionately cut certain service lines leading to Black communities. In response to the report, the city restored service to some areas and began working with researchers to create a new line that would connect the communities more efficiently. Additional equity analysis studies identified that while equity was technically increased, it also inadvertently created new barriers to access for disadvantaged communities (Liu et al., 2023). Despite these challenges and consequences, it is essential to note that for PDCs that want to implement equitable policy, it is vital that the organization remain open for feedback and develop plans thoroughly to avoid these missteps. Incomplete projects that lack equity consideration risk creating more problems than solving them. The RVA redevelopment plan is an excellent example of the potential costs of producing undeveloped plans; if the city had made more efforts to connect with the different communities, they might have avoided the error. When preliminary plans are executed, additional costs will be required, leading to a more expensive investment for the city.

## Evidence from other Planning District Commissions

Despite equity considerations being absent from most of the planning, some PDCs have successfully created programs resulting in positive outcomes. Equity outcomes will often differ depending on how the PDC defines a successful implementation. For these PDCs, equity programs take an internal approach by increasing diversity among staff members to reflect better the demographic of the population they serve, increasing education and experience regarding equitable policies, and creating new methods to engage with new stakeholder groups. Based on feedback from internal surveys, PDCs that achieved internal equity success have reported that staff members feel more confident and willing to try new approaches that will create external equity benefits in their communities (PlanRVA, 2021b). By improving the internal systems first, they can engage with new external stakeholders that may have been previously neglected. New interest groups have sometimes approached PDCs to establish community feedback programs. Once staffers can incorporate equity considerations in their planning, it is expected to see more department-specific policies incorporating equity. Planners expressed through feedback surveys that they use their equity trainings in their daily jobs, and external stakeholders were more likely to be positive and supportive of being involved with new programs (PlanRVA, 2021b). These feedback forms measured the level of staffer satisfaction through survey

questions that were ranked on a 1-5 scale. A staffer responding with a “1” expresses little experience or knowledge about working with an equity program, while a 5 represents a staffer that is confident or experienced in working with a familiar equity program. Figure 3 below offers a few examples from the survey for additional context.

It is important to note that even though some organizations have implemented effective policies, there is no one-size-fits-all solution. Each organization has different factors and influences that can affect how plans are created; even if one PDC states success, it does not confirm that all PDCs will

**Figure 3: Sample of PlanRVA’s Survey Questions**

How much experience have you had coordinating or participating in PlanRVA's efforts to involve the community in key decisions and priorities?

None at all   ☐ ☐ ☐ ☐ ☐   A considerable amount

How much of your work is comprised of community engagement?

None at all   ☐ ☐ ☐ ☐ ☐   A considerable amount

To what extent do you believe that PlanRVA has succeeded in engaging the public?

Not at all successful   ☐ ☐ ☐ ☐ ☐   Very successful

What is an example of a successful community engagement by PlanRVA?

Which of these tools that PlanRVA is currently using is the most effective in engaging the Richmond region community?

- a.   Surveys or Questionnaires on the PlanRVA Website
- b.   Social Media (Facebook, Twitter, LinkedIn)
- c.   YouTube Livestreams
- d.   Public Comment Periods
- e.   Other:

(PlanRVA, 2021b)

experience the same level of effectiveness. Reporting on equity is still very limited with most programs still in development or waiting to produce outcome analysis. Additionally, for programs that have met success, reporting data is mainly in the form of qualitative data. Feedback forms, survey data, and engagement levels are the most common form of reporting.

Evidence on Internal Equity Initiatives

*How do internal equity initiatives increase equity?*

Equity planning addresses systemic inequalities and promotes a fairer distribution of resources, opportunities, and benefits for disadvantaged communities. Current policies and programs are proving ineffective at addressing these issues as the inequality gap continues to grow. PDCs have recognized the threat of letting growing disparities continue without intervention and are attempting to incorporate new policies based on equity and fairness. Equity initiatives cannot be simply created; organizations must perform outreach campaigns to connect with disadvantaged communities to incorporate them into the planning process effectively. Current PDCs, like the TJPDC, attempt to connect with these external stakeholders and encourage them to participate but have difficulties with expanding their networks. Through informal interviews, planners at the TJPDC have shared that they are eager and willing to create equity initiatives but lack the time and experience to create effective programs. Low levels of engagement restrict the ability of PDCs to engage with disadvantaged communities that were previously ignored. Research performed in 2018 by McKinsey & Company investigated companies that promote diversity and equity and revealed that increased levels of diversity result in higher performance and profitability when compared to companies that lack diversity (Hunt et al., 2018). McKinsey & Company reviewed the financial performance of different companies and reported that companies promoting equity have higher levels of talent, higher quality of decision-

Figure 4: Companies Perform Better when Incorporating DEI

The data suggests diversity correlates with better financial performance.

Likelihood of financial performance above national industry median, by diversity quartile, %



Source: McKinsey Diversity Database

McKinsey & Company

(Hunt et al., 2015).

making, more creative solutions, higher levels of general motivation and satisfaction, and improved organizational image/reputation (McKinsey & Company, 2022). A 2015 report, represented by *Figure 4* above, shows that companies with more diversity on average were 25% more likely to achieve above-average financial returns when compared to companies not incorporating equity (Hunt et al., 2015).

Regarding equity programs among PDCs, the National Association of Development Organizations (NADO) published a report in 2022 identifying ten PDCs from across the nation that effectively implemented equity programs within their organization. NADO interviewed each PDC to learn about the different approaches each planning commission took.

The four goals are:

1) Promoting awareness of PlanRVA in the community,

2) Increasing the participation on public comments when proposing new policies,

3) Increasing the level of community collaboration,

4) Increasing internal staff awareness of equity concepts by reducing unconscious bias.

(Martha Shickle & Rashaunda Lanier-Jackson, personal communication, March 20, 2023).

Eight of the ten interviewed PDCs expressed that by promoting internal equity training and initiatives, they could see external benefits emerge (Ristig, 2022). PlanRVA, a PDC responsible for the Greater Richmond region, shared in an interview that the PDC wanted to measure the impacts of internal equity training and education on their staff. Surveys were distributed among the staffers to obtain a baseline of equity education and experience. Feedback suggested that staffers “expressed an interest in receiving training related to conducting successful community engagement to enhance their own understanding and skills” (PlanRVA, 2021b). Rashaunda Lanier-Jackson was eventually hired to be the Community Engagement Manager and Title VI Coordinator. Her role promoted equity through internal training, meetings, and workshops that focused on increasing the capacity of the PDC’s staffers. By establishing four common goals, the PDC and its staff could rally behind the initiatives in pursuit of achieving their mission.

Periodically, staffers would be given surveys to track their progress and collect feedback on whether they felt the training and conversations were effective. In a year, PlanRVA reported increased levels of external stakeholder engagement, a more diverse workforce (only two new positions were added, but both increased diversity among the PDC), new interest groups that approached the PDC to collaborate and provide new insights, and high levels of satisfaction among PlanRVA staffers (M.

Shickle & R. Lanier-Jackson, personal communication, March 20, 2023). Planners also expressed in feedback that their conversations with internal and external stakeholders were more likely to include equity implications (M. Shickle & R. Lanier-Jackson, personal communication, March 20, 2023). The level of support has motivated the PDC to pursue other additional equity initiatives. Thanks to the internal programs, PlanRVA created an Inclusive Purchasing Program that focuses on buying from women or minority-owned, further increasing equity in their region (PlanRVA, 2021a).

**Evidence from Equity Research**

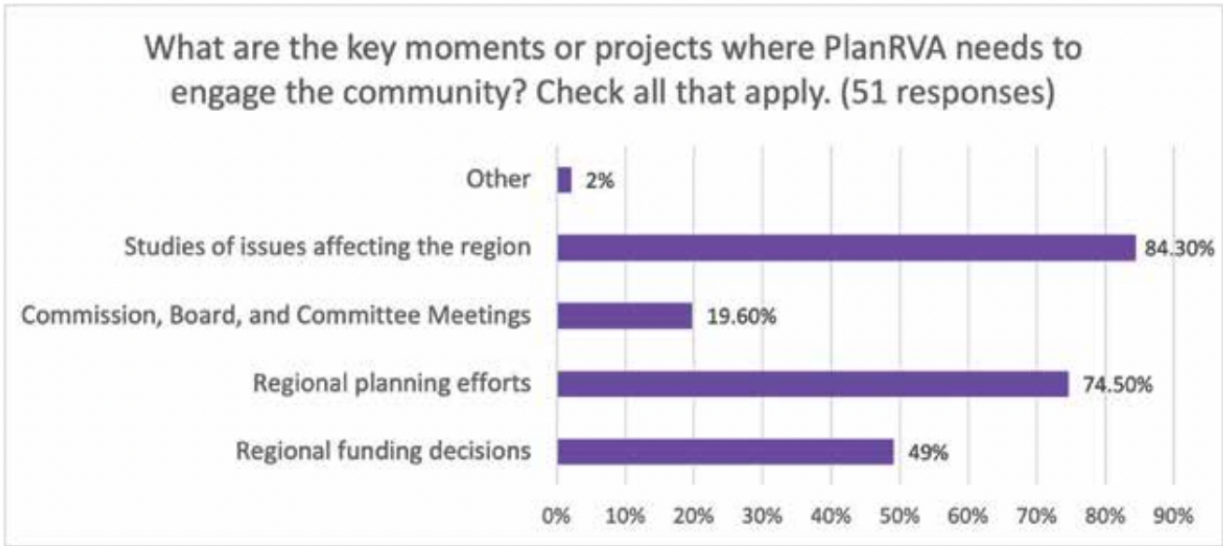
*How does research increase equity?*

Following the murder of George Floyd in 2020, there was a shift in how PDCs began to view their role as regional actors. Racial tensions were heightened as protests erupted throughout the United States, and communities called for systemic changes in government. Staffers recognized that their strategies for community engagement were outdated and ineffective as they struggled to make new connections. Research was needed to identify where inequities exist to create effective policies that engage disadvantaged communities. As a result, PDCs began awareness campaigns to highlight harmful policies and work to connect with stakeholders.

The Chittenden County Regional Planning Commission (CCRPC) in Winooski, VT, took on this task and performed extensive DEI research to identify inequities. The report revealed growing disparities that stemmed from the CCRPC’s work, and previous attempts at addressing racial inequities in their region were ineffective at engaging with the necessary stakeholders. Through their research, the CCRPC partnered with 30 county organizations to declare racism a public health crisis and host an equity summit in 2021 to share their findings with the public (Ristig, 2022). A report comprising the main takeaways from the summit was published in 2022 and outlined the necessary steps the region needed to take to effectively create new equitable policies (Mitchell & McCormack, 2021). The CCRPC created new relationships with disadvantaged communities through their work, and now are collaborating directly with the planning team.

Research has been crucial for PDCs wanting to create equitable policies for their region. Data collected from these reports provide PDCs with a clear direction to formulate equity frameworks and timelines for future programs. In Figure 5, PlanRVA’s survey data identified that performing research to understand better their region’s issues was the PDC’s highest priority (PlanRVA, 2021b). The CCRPC and the Office of Equity and Human Rights for the City of Portland both state that performing equity research is a vital tool that allows PDCs to not only assess their role in potential societal inequities but also set up sustainability metrics for creating long-term programs (Mitchell & McCormack, 2021).

Figure 5: PlanRVA Survey Data Identifies High Priority Areas



(PlanRVA, 2021b)

Methodology

This report aims to propose, analyze, and evaluate policy options that address the need for equity considerations to be implemented in the planning process within the 10th planning district of Virginia. The following section introduces four evaluative criteria that were used to evaluate the proposed policy alternatives. The remainder of the report focuses on the three policy alternatives offered to the Thomas Jefferson Planning District Commission for potential implementation. The alternative section will provide a brief overview of the option and an evaluation by applying the four criteria. It is important to note that the criteria are not weighted equally among the four considerations. After discussing the plan for implementation and evaluating potential tradeoffs, an outcome matrix will compare alternatives. The last section will contain this report’s final recommendation that identifies the policy option weighted with the highest likelihood of successful implementation.



Evaluative Criteria

When considering potential alternatives, it is vital to assign comprehensive evaluative criteria to realistically assess the probability of success. Each criterion will be assigned to the alternatives independently; a final recommendation will be evaluated based on which alternative receives the highest probability of success from the criteria. It is important to note that while each criterion is essential for consideration, they are not weighted the same. Each alternative will be weighted on a scale from **1 to 3** and will initially be given a baseline ranking score of **1** (low likelihood of implementation). The rankings will be evaluated from most to least favorable.

- (3) High Likelihood:** Suggests the alternative would likely have few difficulties to implement this alternative and will create the largest beneficial impact.

**(2) Medium Likelihood:** Suggests the alternative would likely encounter challenges but is still moderately likely to be implemented. If the alternative is successful in implementation, it may not be as impactful when compared to other alternatives.

**(1) Low Likelihood:** Suggests the alternative would encounter many issues and would generate little to no positive impacts.

Cost

Considering that a significant challenge for TJPDC is adapting to their limited budget, the cost is weighted at 30%. The cost is associated with how much it would cost for the TJPDC to implement the alternatives. The cost will be measured based on the expenses to run the policy alternative for 12 months. It is important to note that there needs to be more funding for any new alternative, meaning that an external funding source would be required. Therefore, working with external stakeholders to create grant funding opportunities offers the best approach.

Equity

Equity is measured by evaluating diversity and engagement with internal and external stakeholders and interest groups. Increasing internal equity can be evaluated by the level of diversity, experience with equity, and increased mentions of equity in daily planning work. External equity can be measured by increased external stakeholder participation, awareness of equity work, and engagement with previously unheard interest groups. Because equity is a crucial component that defines whether the alternative effectively achieves equity, it is weighted at 40%. The alternative will start with a baseline score of **1** (Low Likelihood) given that no new equity programs will arise. The alternative will earn a **(+.5)** increase in its score for meeting each submetric.

- (+.5) Evidence that staffers gain experience and training in relation to equity.
- (+.5) Evidence that equity increases externally.
- (+.5) Evidence that the alternative promotes long-term growth.
- (+.5) Evidence that the alternative increases internal diversity.

*Political Feasibility*

Political feasibility evaluates the likelihood of policies being supported and implemented by institutions and individuals in positions of power while also considering how members of the public will perceive equity; it is weighted at 20% (Dror, 1969). The alternative will start with a baseline score of 1 (Low Likelihood). Each submetric met will increase the score by (+.5).

- (+.5) Evidence that the alternative will be supported by the board of commissioners.
- (+.5) Evidence that the alternative will be supported by the public.
- (+.5) Evidence that the alternative will be supported by external stakeholders.
- (+.5) Evidence that the timing is right to propose this alternative.

*Administrative Feasibility*

Administrative feasibility is evaluated as the likelihood and effectiveness that staffers of the TJPDC will implement equity programs. Most staff members have general conceptions of the benefits of equity but need more professional experience and resources to implement fully developed plans. However, their willingness to learn and adopt these programs suggests that administrative feasibility should be weighted at 10%. The alternative will start with a baseline score of 1 (Low Likelihood) and increase by (+.5) with each submatrix goal achieved.

- (+.5) Evidence that alternative or similar convention has been already introduced.
- (+.5) Evidence that the alternative directly increases the capacity of staffers.
- (+.5) Evidence that staffers will be provided the necessary resources to implement initiatives.
- (+.5) Evidence that the alternative is better positioned to integrate into broader goals.

In the **Summary Outcome Matrix** section, submatrices help identify how each alternative earns its score. It is important to note that there are some components of the alternatives that overlap with one another. To isolate and understand expected outcomes of each alternative, this report assumes that each alternative will be independent. This means that while internal equity initiatives will sometimes perform research, it will likely not be at the same scale or scope compared to the expected outcomes for external consultant research.



# Policy Alternatives

## Policy Alternative 1: Status Quo

Overview: Alternative 1 focuses on pursuing the current status quo policy for the TJPDC. As it stands, the TJPDC does not have any equity action plans projected to be implemented. The PDC does not have the capacity or funding to conduct any additional equity considerations besides the mandatory analysis conducted for transportation plans and the Title VI plan.

## Evaluation of Policy Alternative 1: Status Quo

*Cost: High*

Weighted at 30%, cost is measured under the assumption that the TJPDC will not perform any additional equity initiatives but will continue with the preestablished Title VI plan. While there will likely not be any changes to the cost due to no new programs being implemented, it is important to consider the long-term costs that could impact the TJPDC. Equity is becoming more common as more organizations and agencies implement equity considerations into policy making. Over 80 federal agencies have published equity action plans in response to President Biden’s executive order emphasizing the importance of equity (The White House, 2023). If the TJPDC neglects to engage in equity actions, the level of external stakeholder engagement is unlikely to change. A lack of new equitable policies suggests that any additional program the TJPDC is responsible for will continue performing its duties but risk excluding disadvantaged communities that could benefit from new policies and engagement.

These costs pose a threat to the TJPDC’s effectiveness. Excluding potentially disadvantaged communities directly conflicts with the mission of the TJPDC and can make it even more challenging to engage with communities. Suppose in the future the TJPDC is required to incorporate equity programs. In that case, the organization will most likely have to either quickly hire an additional staffer to perform equity work or assign a current staffer to work on equity for a certain number of hours a week. The TJPDC has previously denied staffers the ability to work on equity because it would require pulling the employee away from their current work and supplementing the equity position using funding from preexisting budgets. The organization has advised against this because it can threaten the success of a current TJPDC program by leaving it with fewer funds. Applying the cost criteria, the TJPDC would likely have a high likelihood of continuing their daily responsibilities in the short run;

however, in the long run, the TJPDC would earn a low weighting based on the cost of using a current employee to perform equity initiatives.

*Equity: Low (1)*

Weighted at 40%, equity is measured on the internal and external equity engagement level. Current equity actions taken by the TJPDC are only covering the bare minimum. Outside of the Title VI plan, the TJPDC lacks comprehensive equity planning. Staff members have stated they have a general understanding of equity and its importance but cannot implement programs independently. External equity measures, like increasing community engagement and improving awareness of the TJPDC among community members, is reported by TJPDC staff to be at low levels. Through informal interviews with staff, the organization is finding difficulties engaging with interest groups outside of the communities they are already working with. Considering the equity submatrices, alternative 1 suggests they will unlikely increase equity in any manner, earning a baseline score of 1, a low likelihood of implementing equitable policies.

*Political Feasibility: High (3)*

Weighted at 20%, political feasibility is measured in the likelihood of equity implementations at the status quo. Currently, the TJPDC does not receive any type of opposition when introducing their Title VI plan or when conducting a mandatory four factor analysis for their transportation plans. The TJPDC is an advisory organization and a 501(c)(3) nonprofit; this restricts the PDC’s ability to comment or participate in politics (*Planning District Commissions (PDCs)* | DHCD, n.d.). TJPDC’s apolitical stance suggests they are unlikely to encounter any political opposition when pursuing the status quo. Additionally, the work conducted by the PDC in the neighboring counties is reported to be highly appreciated by most residents and county offices, regardless of political stance (10th Planning District of Virginia’s Commissioners Board, 2022). Continuing the status quo would likely encounter no other opposition from the public or regional leadership team. Applying political feasibility to the submatrices, all requirements would likely be met considering no major changes is being made that would garner opposition. The TJPDC encounters minimal push-back from the board, external stakeholders, and the public **(+.2)**. The lack of current equity programs and limited stakeholder engagement suggests the status quo would meet all submatrices and earn a score of **3**, a high likelihood of implementation.

*Administrative Feasibility: Low (1)*

Weighted at 10%, administrative feasibility is measured based on the likelihood of the TJPDC effectively producing equity initiatives. Besides the Title VI plan, the TJPDC attempted in the past to assign one of its staffers to conduct additional equity considerations and improve the Title VI plan to incorporate equity considerations into other departments. The informal proposal was denied because the staffer could not divert their time away from their current work. Because staffers are working at max capacity, there are no opportunities for the TJPDC to create new equity plans., Continuing the status quo is unlikely to increase the capacity of staffers, provide staffers with resources, or better position the TJPDC to implement broader goals, earning a total score of 1, a low rating.

**Policy Alternative 2: Consultant Research**

Overview: The TJPDC will post a bid for hiring a consultant organization that will perform equity research on behalf of the TJPDC. Specifically, the consultant group will be required to produce a report identifying internal inequities within the TJPDC and external inequities in the region. If adequate funding is available, the consultant group will also produce policy roadmaps, equitable hiring processes, and external stakeholder research.

**Evaluation of Policy Alternative 2: Consultant Research**

*Cost: Medium (\$46,000)*

Weighted at 30%, cost is measured by the expenses required to hire a consultant group. Different factors must be determined before posting a bid for hiring like scope of the program, specifically requested outcomes, length of the research, prior experience, and the proposed consulting budget. Predicting the cost of consultant work can sometimes be difficult due to Virginia state code stating that for “professional services,” organizations are not allowed to ask how much the consultant costs would be upfront or include it in their Request for Proposal (RFP) (*Virginia Public Procurement Act*, n.d.). This is mainly set to promote the quality of the consultant work over organizations looking to pursue the cheapest option. Regarding Alternative 2, the consultant group would need to be hired for 12 months and would be scaled to perform research targeting the 10<sup>th</sup> planning district of Virginia. Internal conversations with TJPDC’s Chief Operating Officer and Program Director revealed that previous consultants were used to research for multiple different departments like transportation and housing. The Regional Housing Needs Assessment and the housing HOME-American Rescue Plan (ARP) are the most similar programs in scope and scale to the potential equity assessment program.

Both plans were primarily focused on researching inequities within the region and produced resources comparable to the requested outcomes for an equity assessment program. Internal conversations with the TJPDC’s COO confirmed that averaging the cost of the two plans would produce a realistic estimated budget for hiring a research team. The TJPDC’s Regional Housing Needs Assessment estimated the consultant work at \$58,000, and the TJPDC’s HOME-ARP assessment estimated the cost at \$35,000 (Partners for Economic Solutions, 2019). For alternative 2, we can assume the estimated cost for hiring consultants would be an estimate of \$46,000. However, the consultant's price would still largely depend on the price they offer during the bidding process. TJPDC staffers stated that if the cost of the research is deemed too high, the TJPDC can negotiate a lower price by altering the requested outcomes from the study. For example, if \$46,000 is out of the price range for the TJPDC, the organization can remove the request to produce an updated Title VI plan to obtain a more affordable price for the PDC.

The TJPDC has a few methods to pay for the consultants, but this will depend on whether the PDC has preexisting funds that could be diverted to support the research. PDCs from other states that successfully hired consultants to improve their equity engagements used a combination of grants and billing out from departments to cover the cost. The TJPDC can present the research proposal to the region's county offices to pool funding or apply for grants that support equity initiatives. However, if the TJPDC wanted to bill out to the local counties, it would need to be planned well in advance because those budgets use their pooled funds to cover funding gaps. Applying for an equity grant presents the most viable method of acquiring funds because it avoids pulling funds from TJPDC budgets. PDCs like PlanRVA have stated that working with local community NGOs like the Community Foundation organization, to create a specific equity grant for their organization provides flexibility and a grant with specific deliverables.

While research offers a more flexible funding option, it offers limited application after the 12 months has expired. Consultants will not stay with the TJPDC to guide their operations. Applying the cost criteria, the second alternative estimates the cost at \$46,000. Considering the difficulties of acquiring funding, this criterion earns a **(2)** or a medium likelihood of implementation.

*Equity: Medium – High (2.5)*

Weighted at 40%, equity is measured based on the effectiveness of engaging with external and internal stakeholders, performing research equitably, incorporating a diverse collection of participants, and

measuring the success of producing effective documents and proposals. When hiring consultants, the TJPDC should be specific with their requests to ensure research is conducted equitably and the outcomes are developed enough for the TJPDC to use. Success is measured based on feedback from external and internal stakeholders on their perceptions of equity inclusion and on the reports' effectiveness.

The Urban Institute has recognized that research sometimes neglects to incorporate an equity perspective, stating, “Even when data aren’t used to intentionally harm, they are often created and analyzed without input from the people at the heart of the issues being studied. With a critical lens, analysts can evaluate their data practices and use data as a tool to advance equity and well-being” (Gaddy & Scott, 2020). The purpose of the research should always be at the forefront of the consultant’s priorities to ensure their research correctly applies the correct criteria. The TJPDC has previously worked with consultant groups when conducting research and should be well prepared to specify the intended outcomes of their work. The consultant group, Partners for Economic Solutions, was hired by the TJPDC to perform housing research on behalf of the TJPDC and Regional Housing Partnership in 2019. Their work provided context regarding the housing situation in the region and provided the TJPDC with actionable data that guided their future programs (Partners for Economic Solutions, 2019). The TJPDC shared the data with external stakeholders to bring awareness of the housing crisis, which eventually helped the Regional Housing Partnership publish its 2022 Strategic Plan.

It should be noted that even if a consultant produces comprehensive research and project plans, the PDC must engage in another search for funding to help implement these programs. Some PDCs like PlanRVA were able to utilize their consultants to assist in equity training workshops, but this would need to be specified in the proposal. If a consultant is not requested to engage in internal equity trainings, the PDC would be unable to implement programs independently. Their consultants produced a comprehensive equity strategy plan for the Mid-Columbia Economic Development District in The Dalles, Oregon. However, the PDC’s next steps are to return to search for funding opportunities, which can often be highly time-consuming (Ristig, 2022). If the PDC does not have adequate funds to support a longer-term or more comprehensive consultant program, this can threaten future equity success.

Alternative 2 earns **(+1.5)** points because evidence states that it will provide staffers with resources used to gain experience understanding equity **(+.5)**, evidence is shown to increase equity externally by

working with external stakeholders to collect data (+.5) and provides evidence that promotes long-term growth with the addition of roadmaps and frameworks (+.5). The second alternative earns a total score of 2.5, a medium-high rating. The rating can increase if the PDC has the necessary funds or incorporates sustainability measures in the proposal request that promote diversity hiring and future direct collaboration.

*Political Feasibility: Medium – High (2.5)*

Weighted at 20%, political feasibility is measured on the likelihood of implementation based on political organizations and individuals’ willingness to accept and support equity research. It is important to consider the potential barriers to implementing the research’s findings and the obstacles to identifying inequities. For external consultants, possessing the flexibility to perform research in adaptable ways is one of their greatest strengths; however, the current political climate in Virginia revolving around equity could create challenges. For example, a commission established by the previous governor of Virginia, Gov. Northam, performed an in-depth analysis of existing policies and systems within the state government in 2020 and 2021 to identify where inequalities exist. The commission published two reports and identified numerous disparities and harmful policies in Virginia’s government systems (Schnieder, 2022). These metrics were crucial in establishing the narrative that systemic policies create inequities in almost every facet of society. However, after Gov Northam’s failed reelection campaign, the current governor, Gov. Youngkin, disbanded the commission under the assumption that equity is a racist policy that lacks benefits to implement in current policy. Gov. Youngkin removed the commission’s reports from the governor’s online resources; the report was eventually republished under the University of Virginia’s law department (Commission to Examine Racial & Economic Inequity in the Law, 2022). Some counties within the

TJPD region have reported residents speaking out against equity initiatives, like affordable housing, but have not been entirely successful in eliminating the possibility of future equity research.

There is negative sentiment among some public officials

**Figure 6: Tweet of Bob Fenwick’s Campaign Sign located in Charlottesville, VA**



BOCCHER 29

(Carp, 2023)



about using outside consultants performing research in the region with most claims revolving around the idea that outside consultants operate on a specific agenda instead of remaining unbiased. Bob Fenwick, a previous Charlottesville City Councilman that held the position in 2013, campaigned on this idea (Cvillepedia, 2019). Figure 6 portrays one of Bob Fenwick’s campaign signs stating his disdain towards using consultants; however, it should be mentioned that Mr. Fenwick came in last in his 2017 and 2019 campaigns (Cvillepedia, 2019). Consultant work is expected to encounter some opposition, but it has never been completely obstructed.

Under the political feasibility criteria, alternative 2 meets the requirements for three submatrices, earning an additional **(+1.5)** point. Evidence from similar TJPDC proposals suggests that the board of commissioners would be likely to support research programs **(+.5)**, the public would be likely to generally support the proposal **(+.5)**, and now is an opportune time to introduce equity research considering the current political climate **(+.5)**. There is some pushback from select individuals with influence, but it is unknown if they have the power to prevent any research program. The criteria earned a total score of **(2.5)**, a medium-high rating, suggesting that opposition can disrupt programs but is unlikely they could prevent research altogether.

*Administrative Feasibility: Medium (2)*

Weighted at 10%, administrative feasibility is associated with the likelihood of consultants performing their research and producing practical resources for the TJPDC. This will be measured based on internal and external stakeholders’ feedback responses defining whether the outcomes are effective for future programs. Reports indicate a high level of satisfaction when evaluating the feedback from PDCs that have successfully utilized research consultants. However, this is based on whether the consultants effectively produced the outcomes requested by the PDC during the bidding and proposal stage. Considering that the consultants will have a year to meet their expectations and that the TJPDC has experience working with consultants, it is likely that the consultants will clearly understand the requirements. The most significant risk is associated with the cost of the consultants; if the TJPDC cannot hire a consultant group within its budget, it will have to settle for a minor report or look for other research methods. For example, if the TJPDC can only afford \$30,000 for consultants, they must eliminate sections of the proposal, like creating a policy roadmap. Missing components do not mean that the work from the consultants will not be valuable. However, efforts should be focused on creating a comprehensive proposal that can provide as much data as possible. Because the cost is weighted higher than administrative feasibility, it will affect the weight of this criterion. Consultant

research provides the resources and roadmaps that can guide the TJPDC with the education to create new programs, however the considering the TJPDC is still at a maximum capacity, the staffers are unable to be involved directly. This could create difficulties for broader goals and making personal connections that foster additional equity growth.

The administrative criteria meet two submatrices and earn an additional (+1) point. Evidence provides previous examples of the TJPDC using external consultants **(+.5)**, and that the research reports increasing the capacity of the staffers **(+.5)**. However, considering that TJPDC staffers will be unlikely to perform any equity actions themselves, the external consultant research would provide minimal actionable support. Evidence shows that similar conventions have been introduced but cannot guarantee that overburdened staffers will implement these reports or that the alternative will directly correlate to increasing the staffers' capacities to engage in new equity programs. The research provides great context for the staffers, but additional time and effort from staffers will be necessary for creating meaningful connections with stakeholders. The second alternative earns a score of **(2)** or a medium likelihood.

**Policy Alternative 3: Internal Equity Initiatives**

Overview: Hire a community engagement/equity coordinator to perform internal equity training for TJPDC staff to understand better how to create equitable policy. Increased experience and knowledge of equity programs allow staffers to improve engagement with external stakeholders and produce more effective policies.

**Evaluation Policy Alternative 3: Internal Equity Initiative**

*Cost: Medium (\$135,000)*

Weighted at 30%, the cost will encompass the direct and indirect costs of hiring a new equity coordinator. Combining the direct and indirect costs will result in an estimated *actual cost*. Direct costs include the salary and fringe benefits, like health insurance and retirement plans, for the new position. Indirect costs include rent, internet service, furniture, and any general item that the staffer will use while working at the TJPDC. To generate the effective rate, the report will utilize the following formula provided by the TJPDC:

$$SalaryX + Fringe\ at\ 25\%\ of\ Salary + Indirect\ Cost\ at\ 80\%\ of\ Salary/Fringe.$$



PlanRVA utilized its community partners, like the Community Foundation for a Greater Richmond, to acquire an equity-focused grant to fund the new equity coordinator position. Additionally, the PDC was able to pull funding from multiple different budget plans to supplement the salary and costs of training and other materials (M. Shickle & R. Lanier-Jackson, personal communication, March 20, 2023). Using PlanRVA’s estimated costs, the organization acquired about \$100,000 dedicated to improving its equity action plans and the equity coordinator position (M. Shickle & R. Lanier-Jackson, personal communication, March 20, 2023). Because Richmond and the Charlottesville area have different factors that can affect the cost of the position, this report cannot rely solely on PlanRVA’s estimated costs. To determine our average salary cost, this report evaluates the average costs of Diversity Inclusion Coordinators among the counties of the 10<sup>th</sup> planning district of Virginia. ZipRecruiter offers salary estimates based on “histograms, trends, and comparisons...derived from both employer job postings and third-party data sources” and is a useful tool for estimating salary costs within a certain radius (ZipRecruiter, 2023). Looking at the average cost of a diversity inclusion coordinator within the region, the average salary bracket is \$53,586 – 67,216. We estimate this as an average of \$60,000 (ZipRecruiter, 2023). However, factors like the scope and scale of the work, the number of working hours, and the geographic location can all affect how much the position can earn. Applying this salary to our model gives us  $\$60,000 + \$15,000 + \$60,000 = 135,000$  in actual costs. Our direct costs come to \$75,000, and our indirect costs equate to \$60,000. Refer to the **Appendix: Figure 9** for the complete formula and work shown.

Applying the evaluative criterion of cost results in an estimated actual cost of \$135,000. TJPDC would benefit from working with their local partners to establish an equity grant to support the hiring of the coordinator. The grant would most likely be a one-time funding opportunity that would be able to cover the direct costs for a year. The position would be evaluated over a year to determine the extent of the benefits using metrics like how PlanRVA measured its effectiveness. Internal surveys, frequency of community engagement, and internal equity metrics can produce quantifiable results. If the position is advantageous, the TJPDC can discuss with its funding partners about creating another funding opportunity and introduce the work to the Board of Commissioners. If external impacts are effective, TJPDC should create a proposal to share the costs of the new staffer among the local counties. The coordinator can engage with all county offices and allow the counties access to the training and resources to promote their internal equity initiatives. Despite a higher cost than alternative 2, this criterion also earns a **(2)** or a medium rating due to the potential benefits the PDC can take advantage

of if the program ends after a year. An equity coordinator could create equity plans that are more targeted and adapted to the current work being performed in the TJPDC, which could be continued to limited success after the 12-month period ends.

*Equity: High (3)*

Weighted at 40%, equity can be measured on internal and external equity. Internal equity relates to the level that equity is considered in the organization’s internal systems. It can be measured by affirming that the PDC staff reflects the demographics of the people they serve, improving equitable hiring practices, updating the Title VI Implementation Plan, and ensuring staffers become more comfortable discussing equity issues. The TJPDC will often hire new staffers based on the funding available and the need for their work. If the argument for a new equity coordinator is well developed and funding is available, the TJPDC would likely take steps to hire a coordinator. For example, the TJPDC finance director retired in early 2023; because funding was available and there was an established need, the TJPDC hired a new finance director in mid-April 2023. External equity is measured by the frequency of engagement with external stakeholder groups, collecting accurate demographic data, increasing comment participation among disadvantaged communities, and increasing awareness of the role and actions of the TJPDC.

The TJPDC is required to abide by the Title VI Implementation Plan to receive any federal funds. The “TJPDC is the contractual administrator of the Charlottesville Albemarle Metropolitan Planning Organization (CA-MPO) and Charlottesville Regional HOME Consortium, as well as having other grant-funded program areas”(TJPDC, 2022). The chief operating officer will review these programs to ensure the standards are upheld. The TJPDC’s Title VI plan only covers the bare minimum equity concerns and lacks new equity considerations or deliverables. For example, the current plan states the TJPDC will not discriminate based on race, color, or national origin. The TJPDC will provide updated language translation services for Spanish speakers, it identifies the chain of command regarding which staffer will review and approve the plan, and guides how to submit a discrimination complaint (TJPDC, 2022). Currently, the CA-MPO and Long-Range Transportation Plan (LRTP) are the only two programs that require a four-factor analysis to identify any existing inequities. Updating this plan will encourage organizational procedures that promote equity and inclusion.

External equity can be measured by comparing the level of engagement with outside stakeholders before and after implementation. TJPDC staffers have reported difficulties expanding their engagement levels due to insufficient equity considerations. Training and education revolving around equity can help improve these relationships. After implementing their internal equity initiatives, PlanRVA reported that the “investments by PlanRVA in relationship building has resulted in additional participation by external organizations and stakeholders in planning processes” (PlanRVA, 2021b).

Applying the equity criteria, alternative 3 earns an additional **(+2)** points for meeting all the submatrices. Evidence suggests that internal equity programs will increase staffers’ experience with equity **(+.5)**, equity increases externally with new external stakeholders **(+.5)**, long-term growth is promoted through staffers’ ability to practice their equity training and work with the coordinator for future projects **(+.5)**, and evidence shows that diversity is likely to increase through implementing new equitable hiring practices **(+.5)**. Considering the minimal success TJPDC has seen with creating new external stakeholder relationships, any other engagement can be seen as a positive. Therefore, alternative 3 is likely to meet all the proposed submatrices to achieve a total score of **(3)**, or a high likelihood of implementation.

*Political Feasibility: High (3)*

Weighted at 20%, political feasibility is measured on the likelihood of implementation based on how institutions, individuals with power, and the public’s willingness to accept and support equity programs (Dror, 1969). Before hiring any new position, the TJPDC’s executive director must introduce the proposal to the Board of Commissioners for a vote. The Board of Commissioners meets monthly on the first Thursday to share updates and discuss potential regional changes. The locally appointed 12-member Commission requires at least 51% to be locally elected officials representing each of the six local counties (*Introduction to PDCs*, n.d.). The board has been reported to be highly supportive of the TJPDC’s actions and has stated during commission meetings that they are pleased with how the TJPDC has supported their growth (10th Planning District of Virginia’s Commissioners Board, 2022). In a

“Investments by PlanRVA in relationship building has resulted in additional participation by external organizations and stakeholders in planning processes.”

--PlanRVA

meeting with Greene County’s Planning Director, Greene County expressed the desire to see more regional equity initiatives (J. Frydl, personal communication, March 16, 2023). If the TJPDC proposes a new equity hire, the board would likely support the initiatives.

Applying the criteria, alternative 3 will likely meet all the submatrices to earn an additional **(+2)** points. Evidence from PlanRVA and other PDCs that performed internal equity programs suggests that by focusing on internal equity growth, the organization will receive support from the board of commissioners **(+.5)**, will receive support from the public **(+.5)**, and will have their external stakeholders support their internal initiatives **(+.5)**. The current political climate seems suitable for the TJPDC to introduce this plan, meeting the final sub-criteria **(+.5)**. All submatrices are likely to be achieved through alternative 3 for a total score of **(3)**, a high likelihood of implementation.

*Administrative Feasibility: High (3)*

Weighted at 10%, administrative feasibility is measured on the likelihood of the TJPDC’s ability to implement equity programs. It considers the PDC’s capacity, available resources, and motivation of staffers to work on these issues. The external programs being measured would revolve around the success and willingness of planners to conduct equity assessments in their daily jobs. Collecting feedback from internal and external surveys on the satisfaction level will indicate whether a program was implemented well. PlanRVA’s initial staff surveys reported the desire for “internal stakeholders to improve community engagement efforts and agency awareness, particularly concerning PlanRVA’s involvement with vulnerable communities, social media presence, branding, and regional collaboration”(PlanRVA, 2021b). Out of the 52 respondents, an overwhelming majority expressed interest in learning more about equity because they recognized the concept as a beneficial aspect of policy planning.

Informal conversations with TJPDC staff portray a similar perspective. Staffers are very open to learning and implementing equity, with some staffers being active members of the Charlottesville Equity Center. Despite their intentions, TJPDC staffers work at maximum capacity and must devote time to their roles. PlanRVA’s initial survey recorded a similar experience stating staffers have “no availability to take on additional responsibilities related to increased community engagement. Several internal stakeholders shared that they only conduct community engagement for a project when it is state or federally mandated due to time and resource constraints...undertaking additional community engagement in their current position would result in them being able to do less work elsewhere, which

was not viewed favorably” (PlanRVA, 2021b). These responses portray a common theme of overburdened PDCs and planners in Virginia. PlanRVA also noted that reports from external stakeholders expressed a “desire to engage with the agency more”(PlanRVA, 2021b). Some external stakeholders have stated they are willing “to engage with PlanRVA more to facilitate intentional outreach to, and greater participation from, Richmond’s diverse communities.” Interests groups have proposed “unique opportunities for PlanRVA to diversify their communication and engagement efforts” (PlanRVA, 2021b).

Applying the criteria, alternative 3 is expected to meet all the sub-criteria, earning an additional **(+2)** points. Evidence suggests that there have been internal training programs for different departments have helped increase the education and experience level of the TJPDC staffers **(+.5)**. Additionally, internal equity initiatives will increase the capacity of staffers **(+.5)** and will provide the resources necessary to implement the program **(+.5)**. By having an equity coordinator on-hand working directly with TJPDC staff, alternative 3 is the only policy option that positions the PDC to implement equity into broader TJPDC goals **(+.5)**. The high level of support and feedback from both internal and external stakeholders suggests that PlanRVA’s equity initiatives were implemented effectively; additionally, these programs have also provided opportunities for PlanRVA to capture feedback to potentially adapt or reevaluate their methods on how they implement equity. Therefore, alternative 3 would earn a score of **(3)**, a high likelihood of implementation.

Summary Outcome Matrix

Each alternative begins at a score of (1) and earns additional (+.5) for every submatrix goal met.

Alternatives	Cost 30%	Equity 40%	Political Feasibility 20%	Administrative Feasibility 10%	Total Score (Average)
Status Quo	High No cost is expected in the short run. 3 (.9)	Low 1 (.4)	High 3 (.6)	Low 1 (.1)	8 (2)
Consultant Research	\$46,000 (Medium) Lower cost but offers less opportunities for PDC to continue independently. 2 (.6)	Medium – High 2.5 (1)	Medium – High 2.5 (.5)	Medium 2 (.2)	9 (2.3)
Internal Equity Initiatives	\$135,374 (Medium) Despite higher costs, Alternative 3 offers more benefits for long-term growth and independent work. 2 (.6)	High 3 (1.2)	High 3 (.6)	High 3 (.3)	11 (2.7)

Rating	High	Medium-High	Low-Medium	Low
Total Score	3	2.5	1.5	1

Equity Submatrices		Score
Evidence that staffers gain experience and training in relation to equity.		+ .5
Evidence that equity increases externally.		+ .5
Evidence that the alternative promotes long-term growth.		+ .5
Evidence that the alternative increases internal diversity.		+ .5

Political Feasibility Submatrices	Score
Evidence that the alternative will be supported by the board of commissioners.	+ .5
Evidence that the alternative will be supported by the public.	+ .5
Evidence that the alternative will be supported by external stakeholders.	+ .5
Evidence that the timing is right to propose this alternative.	+ .5

Administrative Feasibility Submatrices	Score
Evidence that alternative or similar convention has been already introduced.	+ .5
Evidence that the alternative directly increases the capacity of staffers.	+ .5
Evidence that staffers will be provided the necessary resources to implement initiatives.	+ .5
Evidence that the alternative is better positioned to integrate into broader goals.	+ .5

Recommendation

Based on the matrix above, this report recommends that the TJPDC pursue alternative 3: Internal Equity Initiatives. Despite alternative 3 being more costly than the other options, an internal equity coordinator will have more hands-on involvement with the staff of the TJPDC, allowing individuals to grow and apply their training in their daily jobs. Alternative 2: Consultant Research does have a lower cost; however, outcomes produced by the research can vary depending on the requested outcomes established during the bidding period. Because this report states that increasing equity is the main goal, equity is weighted the highest. Alternative 3 earns a higher score based on achieving all the goals established in the submatrices. Alternative 2 does achieve 3 of the submatrices but lacks the ability for the TJPDC to continue improving equity independently. Political feasibility is rated higher for alternative 3 because of the potential disruptions that could arise from consultants performing their work. Alternative 3 earns a high weighting for administrative feasibility because of the TJPDC’s experience with implementing regional-based programs and the motivation of staffers willing to learn about equity. It achieves all the goals set by the submatrices by providing direct training and capacity building for staffers.

Based on the evaluative criteria, this report recommends pursuing Alternative 3: Internal Equity Initiatives. The TJPDC can utilize its connections to apply for equity-specific grants to implement internal equity programs that will further increase the capacity and abilities of the TJPDC to incorporate equitable planning. Promoting internal growth through these training and educational sessions allows the PDC to share their experiences with external stakeholders. Most PDCs implementing equity programs using the alternative 3 approach reported increased external community participation, new engagement with interest groups, and higher internal satisfaction. The TJPDC would experience similar results if it pursued this policy option.

### Considerations for Implementation

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If the TJPDC chooses to pursue improving equity through internal equity initiatives, there are important themes to consider when taking the next steps.

Acquiring funding for the position will require the TJPDC to leverage its connections and relationships with local NGOs and its partners at the federal and state level. The Charlottesville Area Community Foundation (CACF) has similar roles and responsibilities to the Community Foundation for a Greater Richmond (CFGR). It can aid the TJPDC by exploring funding opportunities using its discretionary grant programs and donor-directed funds. The Community Foundation groups have been highly cooperative with PDCs, even assisting the TJPDC on some projects. The CFGR assisted PlanRVA in 2021 in establishing a roadmap/timeline for creating equity programs and hiring an equity coordinator (PlanRVA, 2021b). The TJPDC and the CACF share an office building, with the CACF located directly above them. This close working proximity can be used in favor of both organizations and could offer a unique working relationship that promotes long-term growth and monitoring. The TJPDC can also leverage its status as a non-profit to apply for grant opportunities from places like the Community Foundation of Central Blue Ridge, Virginia Foundation for the Humanities, or from grant search engines like Grant.gov and Grant Watch. A second method to obtaining funding is to bill out the costs to the preexisting departments. This is commonly used to cover general indirect costs or occasionally to supplement a funding project. However, funding from other budgets leaves fewer funds available for the current staff members and their programs, leaving a budget gap. For the TJPDC, this can limit the organization’s effectiveness in the region. PlanRVA discusses the challenges of acquiring funds for supporting programs and mentions that grant funding is a good option for a one-time funding opportunity, like establishing a new role. However, to secure long-term growth, the

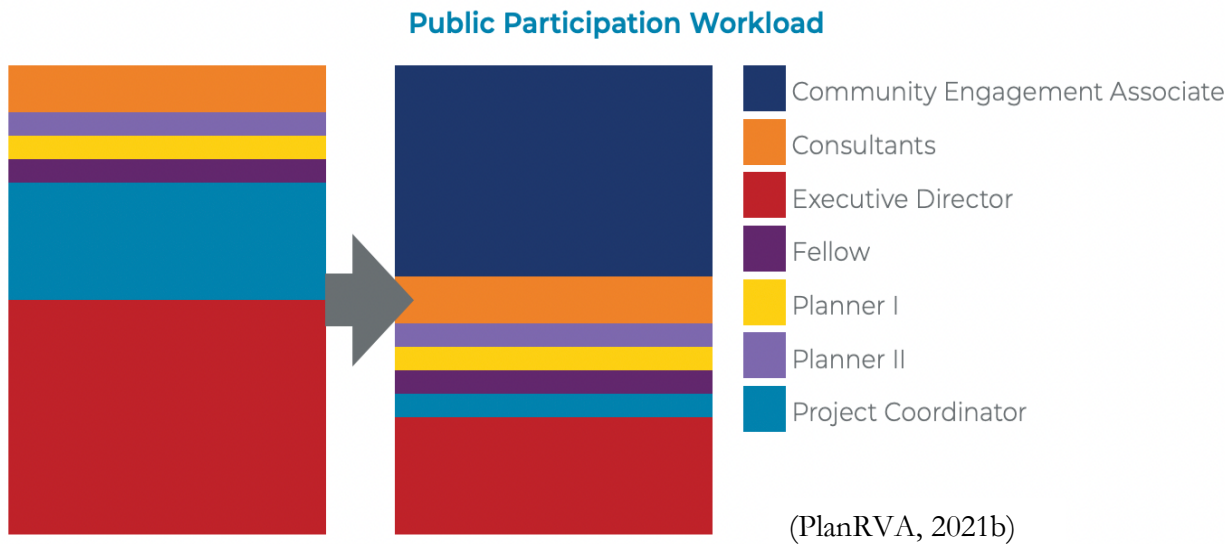


PDC mentions that by encouraging external stakeholders to participate in public meetings that discuss the PDC budget, these actors can advocate on behalf of the organization to express why additional funding should be allocated. There are many risks in creating a new position that does not have sustainable funding. If the TJPDC wishes to commit to longer-term growth, it should operate assuming that the equity coordinator will be included in future budgeting considerations.

Once funding sources have been established, the TJPDC should also consider the importance of conducting a comprehensive interview to locate the best-qualified individual for the job. PlanRVA’s equity coordinator published a “Inclusive Recruiting Program” report that defines the elements of an effective equity manager that an organization should consider when hiring new staff (PlanRVA, 2021c). The report was created to provide agencies with a basic template for improving increasing and increasing diversity in the hiring process. The **Appendix**, Figure 8, includes an example of the template provided by PlanRVA that the TJPDC can utilize. The hiring process should be broken into multiple interviews that dive into the background and experience of the applicant to select the best candidate. PlanRVA also states that an essential part of the hiring process is choosing an individual with the same motivation and dedication to performing equity work (PlanRVA, 2021c). This person will need to be an “intentional leader” in regard to equity and adopt the mentality that “embraces and supports the efforts”(PlanRVA, 2021c). For the TJPDC, no equity coordinator is currently employed, which means that the executive director, the staff, and the equity hire need to be unified to understand the applicant’s role and how it might affect different planning departments. PlanRVA initially had trouble with where the equity coordinator role fit in with the rest of the established departments. The executive director stated in an interview that after the candidate had accepted the offer, they had to reevaluate the executive director's role in equity initiatives. “The executive director did not have the same level of positional authority” and required the PDC to adapt (M. Shickle & R. Lanier-Jackson, personal communication, March 20, 2023). Figure 7 below represents the shift in responsibilities to provide the equity coordinator with opportunities to be as flexible as needed to accomplish their goals. It is important to notice that shift in responsibilities across the entire organization and provide the TJPDC some insight into what kind of candidate they should prioritize hiring. Neglecting a comprehensive hiring process creates the potential risk of hiring an equity coordinator that may be inexperienced or ineffective at creating vital new programs and research.

Once the position has been filled, the TJPDC must provide a clear list of expectations that the new hire should understand before accepting the position. The new position is expected to be employed

**Figure 7: Shifting Operational Responsibilities.**



for a year at the minimum, depending on the amount of funding available. The staffer should be made aware of all the outcomes they are expected to produce throughout the year. This will require the TJPDC to meet with its staff members to collaborate on what they need to understand equity initiatives better. These outcomes should be equity-focused and explicitly defined. PlanRVA states that it is equally important for the equity coordinator to express their limitations to limit overburdening and to set realistic expectations. The coordinator needs to be “open with staffers about their capabilities” while demonstrating a drive to improve equity (M. Shickle & R. Lanier-Jackson, personal communication, March 20, 2023).

The final step the TJPDC should take when implementing these programs is establishing metrics that encourage long-term growth and monitoring. Collecting feedback forms from stakeholders periodically throughout the year can provide the organization with actionable data that can provide suggestions on how to adapt to changing situations. PlanRVA has recommended including these parameters in the hiring proposal to encourage organizations to continue funding their equity programs after the initial year. PlanRVA has stated that there is a need for increased engagement among PDCs to allow them to learn from each other’s experiences. The TJPDC would benefit significantly from fostering a relationship with PlanRVA and continuing to share information and different policy approaches.

## Conclusion

The commission established by Gov. Northam stated after finishing the 2022 report, their work with identifying inequities is not complete but instead provides a positive outlook on where we as a state can grow from here. Equity, at its core, is a long-term solution for combatting systemic inequities. The potential for creating impactful societal change starts with the work at the TJPDC. The PDC has a comparative advantage by being closely connected with its localities and possessing a competent and committed staff. Preparing the internal systems and programs before expanding into a new policy landscape allows the TJPDC to be more effective in their work. In addition, it reduces the cost of potential accidental missteps. By increasing the capacity of PDCs and their staff, equity can create impactful societal changes in the region.

Appendix

Figure 8: Diversity Hiring Form

<b>CANDIDATE EVALUATION FORM IN-PERSON OR VIRTUAL INTERVIEW</b>		
Candidate evaluation forms are to be completed by the interviewer to rank the candidate's overall qualifications for the position to which he or she has applied. Under each section, the interviewer should give the candidate a numerical rating and write specific job-related comments in the space provided. The numerical rating system is structured as follows:		
0=No evidence detected		
1=Poor (below expectations for position)		
2=Adequate (meets expectations for position)		
3=Strong (exceeds expectations for position)		
<b>Candidate Name:</b>	<b>Candidate Pronouns:</b>	
<b>Name of Interviewer or Panel Member Names:</b>		
<b>Position Title:</b>	<b>Date &amp; Time:</b>	
	<b>Interview Round:</b> 1   2   3   _____	
<b>CANDIDATE EVALUATION</b>		
<b>Criteria</b>	<b>Rating</b>	<b>Comments</b>
<b>The candidate was prepared for the interview.</b>  <i>(Punctual, asked questions, researched position, provided examples, etc.)</i>		
<b>The candidate's previous experience is relevant to the primary job responsibilities and competencies.</b>  <i>(Provides examples of previous experience with specific details to demonstrate knowledge and capabilities)</i>		
<b>The candidate demonstrated commitment to diversity, equity and inclusion.</b>  <i>(Knowledge of terms and value of DEI in workplace, position)</i>		
<b>The candidate demonstrated technical, social, emotional, and cultural competencies relevant to the position.</b>  <i>(Provide examples of position-specific competencies, i.e. conflict resolution, teamwork, collaboration, project coordination, etc.)</i>		
<b>The candidate demonstrated effective [verbal and written communication or other technical] skills necessary for success in the position.</b>  <i>(Discuss experience with writing for various audiences and in various formats such as email, memo, social media, etc.)</i>		
<b>[Other Notes / As relevant to position or determined by hiring manager]</b>  <i>(Additional relevant expectations for experience, as determined by position description, organizational needs, etc.)</i>		
<b>OVERALL RATING</b>		
<b>Overall Score</b>	<b>Total</b>	<b>Additional Comments</b>

**Figure 9: Calculations for Determining Actual Cost of Hiring a Staffer**

*SalaryX + Fringe at 25% of Salary + Indirect Cost at 80% of Salary/Fringe.*

Estimated Average for Diversity and Inclusion Managers in the 10<sup>th</sup> Planning District of Virginia:  
\$53,586 – 67,216. Potential costs may increase or decrease depending on prior experience and education.

Average: \$60,166

$$\$60,166 * .25 = \$15,041.50 \text{ (Fringe Amount)}$$

$$\$60,166 + \$15,041.50 = \$75,208 \text{ (Direct Cost - Rounded up to nearest dollar)}$$

$$\$75,208 * .80 = \$60,166 \text{ (Indirect Cost)}$$

$$\$60,166 + \$15,041.50 + \$60,166 = \$135,374. \text{ (Actual Cost)}$$

(ZipRecruiter, 2023)

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