

Updated March 15, 2023

Definition of Terms

Diversity: Diversity refers to all aspects of human difference – including, but not limited to race, ethnicity, creed, color, sex, gender, gender identity, sexual identity, socio-economic status, language, culture, national origin, religion/spirituality, age, and (dis)ability.

Inclusion: Inclusion refers to a community where all members are and feel respected, have a sense of belonging, and in which everyone is able to fully participate and achieve their potential. A community can be both diverse and non-inclusive at the same time.

Equity: Equity is fairness and justice. An equitable community is one that provides all individuals with the support and access they need to thrive and reach their potential. For example, in the graphic below, individuals with different heights are given different stools to reach the same fruit.



[Graphic: American Planning Association]

Questions and Answers

What is an equity audit?

- An equity audit is used for the following purposes:
 - To demonstrate the commitment to equity in an organization or municipality
 - To help the community understand current conditions and deficits
 - To establish a baseline for measuring progress on DEI initiatives
 - To create a foundation for future initiatives.
- An equity audit broadly assesses barriers to equitable representation and opportunity. Using a range of methods, from surveys to focus groups to policy analysis, an equity audit partners with town residents and employees to try to answer the question, “How can our town best serve individuals of all backgrounds?”
- The audit generally offers a baseline needs assessment, preliminary action plan, and methods for conducting on-going assessments.
- The audit aims to be complementary to the work the Town has already done.
- The audit is akin to other planning documents like the [Unified Plan](#), Housing Production Plan, Climate Action Plan, and Sustainable Mobility Plan.

Where did the idea for an equity audit come from?

- In 2021, the Town’s Executive Director Meghan Jop and Assistant Executive Director Amy Frigulietti established a Diversity, Equity and Inclusion (DEI) Task Force consisting of community members and employees. The task force convened in November 2021 with assistance from consultant Lisa Smith-McQueenie. During the first phase of its work, the task force researched best practices and found that many towns in Massachusetts and around the country have identified an equity audit as a helpful first step. For more information, please see the [DEI Task Force Phase I Report \(Updated March 10, 2023\)](#)

Why is an equity audit necessary?

- In the Town’s [Unified Plan \(2019\)](#), diversity and a sense of community were identified as key values guiding the plan and its implementation.
- While it may not be evident to the greater community, residents, workers, and visitors suffer interpersonal and structural discrimination in our town. Sadly, community members report incidents of racism and bias, and non-residents describe feeling unwelcome in Wellesley and even fearful of driving through our town. Some residents in our community aren’t able to engage with the town or its services because they feel threatened and fear retribution.
- On behalf of these individuals, as well as the entire community, the task force has determined that intentional anti-discriminatory action is needed.
- As a first step, an equity audit provides a means to reach out to members of the community to better understand their lived experiences and gather information that will benefit the whole community.

What is the value of an equity audit for our community?

- Individuals and groups in our community have silently experienced discrimination – including overt interpersonal racism or other forms of bias, bullying, physical threats, a lack of representation, and feeling silenced in public forums.
- An equity audit will identify such experiences from the disadvantaged perspective – and increase awareness and understanding in the wider community. We need to understand what our problems are before we can address them and bring about necessary change.
- The DEI Task Force recognizes a difficult history but has no pre-conceived notions of what we are going to find in the audit. This audit will help us learn from and learn about our community and devise a roadmap as well as data to measure future progress.

What is the scope of the proposed equity audit?

- For Wellesley, we propose a broad study that assesses all aspects of equity – race, ethnicity, gender, national origin, color, disability, age, sexual orientation, gender identity, religion, socioeconomic status, or other socio-culturally significant factors.
- The proposed audit would be both internal and external. An *internal* study evaluates town government policies, programs, and practices that directly or indirectly impact staff, volunteers, and the community. An *external* study assesses feelings of belonging and perceptions of bias in the broader community.
- The audit would provide baseline data as well as metrics for measuring change over time.
- The audit would build on past/current DEI work rather than duplicate efforts.

- Examples of topics covered in an audit include health, housing, language access, transportation, employment, appointments to boards/committees, and government representation.

What are the desired outcomes?

Desired outcomes include:

- A deeper, representative understanding of the experiences of those who feel marginalized and systemically disadvantaged;
- An evaluation of Wellesley's services and programs available to all community members, to determine barriers to access, and areas where inequities exist;
- An evaluation of municipal documents, policies, practices, and procedures that impact employees and volunteers in town government;
- A survey of perspectives on how inclusive, equitable, and diverse the town is, based on feedback from town leadership, employees, residents, business owners, and organizations;
- Recommendations and cost estimates for actions and initiatives that advance our vision of equity in Wellesley.

Why is the equity audit broad rather than focused on racial equity?

- Racism is a complicated issue that intersects with many other types of systemic disadvantage.
- We want to better understand a broad spectrum of equity issues and to engage our community in a way that all are included.
- We hope to ensure that all residents feel as though they have a stake in the audit.
- Logistically, it is easier to do a comprehensive audit now rather than doing a racial equity audit alone, and assessing the larger picture at a future date.

Will the audit create more division and pushback in the community?

- Confronting issues of discrimination and bias may feel uncomfortable, but it is far more uncomfortable to experience. The task force is hopeful that Wellesley residents will be willing to engage in a process of reflection and collaboration toward a shared vision of equity.
- We ask that the community at large examine these issues through the lens of the most disadvantaged. We anticipate that this perspective will engender shared understanding and unity rather than division.
- We expect that the information gathered during the audit will serve as the basis for a shared understanding of the work we need to accomplish.

Does the term "DEI" make people shut down?

- The members of the task force make every effort to use inclusive language for this work and recognize that the terms we use may evolve.
- Use of the terms diversity, equity, and inclusion is common among our peer communities and has been useful in discussions with other communities.
- The task force is confident that Town Meeting Members and others will focus on the purpose and substance of the proposal in Article 17, rather than on specific terminology.

What is the cost and timeframe of the equity audit?

- Costs and timeframe vary based on scope and community size. Initial cost estimates for both an internal and external audit range from \$80,000 to \$150,000. Equity audits typically take anywhere from six to eight months depending on the scope. For comparison, Brookline’s racial equity audit will take eight to ten months and cost \$100,000. Newton’s equity audit will take six to seven months and cost \$135,000.

How was the \$100,000 amount for Wellesley determined?

- The task force determined this amount in consultation with our consultant and in reviewing efforts by similar towns in the area.

How is the equity audit funded?

- The task force is seeking authorization for \$100,000 at Annual Town Meeting this spring under Article 17, which is co-sponsored by the Select Board and the School Committee. If funding is approved, the equity audit will be funded from the Town’s cash reserves. Funding would be available at the start of fiscal year 2024 (July 1, 2023).

Aren’t our problems the same as other suburban communities? Can’t we save \$100,000 and just use their results?

- The conditions in Wellesley do not mirror the conditions in other suburban communities. For example, Newton and Brookline have different demographics than Wellesley, and people there most likely have a different experience. The task force’s recommendation is to assess the specific needs of Wellesley.
- A key finding of the DEI Task Force over the past year is that there is no cookie-cutter solution or roadmap for progress on issues of equity and inclusion. Each locale has its own distinct subgroups, governmental structures, institutions, and other entities that shape its structural inequities.
- Wellesley has its own Unified Plan, Housing Production Plan, Climate Action Plan, and Sustainable Mobility Plan – all of which were developed by looking at the unique aspects of our town. We need the same kind of foundational work to advance our goal of being a more equitable and inclusive community.

Could \$100,000 be better used on direct programs rather than just a study?

- Dismantling systemic disadvantage is an incremental, long-term project, and we are wary of rushing to solutions before analyzing our needs.
- Starting with a study has long been considered a core best practice in Wellesley. The Town routinely conducts feasibility studies and hires consultants to help analyze complex problems and offer recommendations. The proposed equity audit will help the Town understand current conditions, which is a necessary starting point for any further steps.

Do metrics lead to tokenism (which is not desired)?

- Racism and the other “-isms” are complicated. We do not think that they can be reduced to metrics alone, and we are wary of tokenism and performative allyship. This is why we are seeking a

comprehensive audit – one that examines both quantitative and qualitative data to begin to characterize the problems and effect meaningful change.

- As a town, we gather metrics for determining priorities on virtually every level, including traffic, teacher/student ratios, waste management, housing, greenhouse gas emissions, etc. Metrics themselves do not lead to anything in particular, but they can provide an important foundation for goal setting and decision making.

What are examples of the tools, methods, questions that will be used in the audit outreach?

- Equity audits employ varied methods for data collection, both qualitative and quantitative. Examples of data collection techniques include paper or online surveys, focus groups, interviews, site visits, and policy analysis.
- Surveys include close-ended and open-ended short answer items. Focus groups target identity-specific groups as well as open focus groups. Interviews may be formal as well as informal. Site visits are intended to give a feel for institutional culture and processes that may be difficult to capture with traditional data-gathering methods. Policy analysis is a line-by-line analysis of official documents, mission and vision statements, reporting protocols, etc.

Who is involved in Wellesley's equity audit?

- The equity audit process will be led by town staff and the DEI Task Force, who will select and oversee a consultant to conduct the audit. Residents, staff, and community members will be involved in the process through focus groups and surveys.

How will the consultant be selected?

- The Town's Executive Director and Assistant Executive Director will work with the DEI Task Force to engage a consulting firm through a Request for Proposal (RFP) process.

How will the equity audit be conducted?

- Working with Town staff, the DEI Task Force will refine, identify, and plan the audit's focus areas and goals. The chosen consultant will then collect and analyze a variety of information. The information will consist of data, focus groups, and online surveys to capture a variety of perspectives. The consultant will develop a final report and action plan. The creation of the report and action plan will build on the key findings from the data analysis conducted. The consultant will meet with the DEI Task Force to review progress and address any challenges.

Will the consultant hired simply use a boilerplate solution, without really looking at Wellesley?

- We enter this process with respect and assumption of consultant professionalism. The sample equity audits we have reviewed have offered recommendations specific to their towns and not generic boilerplate solutions.
- Equity assessments also involve the development of original instruments for particular contexts, rather than "canned" assessment instruments. The consultants work with town members to create surveys, identify focus groups, etc. to address each community's unique challenges.
- The Town's Executive Director and Assistant Executive Director lead the DEI Task Force. They are both expert at conducting a robust Request for Proposal process and at selecting and overseeing

consultants. The DEI Task Force is confident that the professional staff has the expertise to lead this process with input and guidance from the members of the task force, and that our combined efforts will result in a valuable audit that will focus on the unique conditions in Wellesley.

Is the language of the proposed resolution achievable?

- The resolution is an aspirational statement for the town, and the equity audit is a practical first step in making progress on our aspirations. The language of the resolution is intentionally broad to express the Town's opposition to all forms of hate and bias.

Will the DEI vision and mission change?

- The mission and vision were developed to guide the work of the task force. Depending on data and results from the audit, our vision and mission may evolve as our work does.

Who is supporting this warrant article?

- The Select Board and School Committee are the co-sponsors of Article 17. A growing list of other boards and town organizations are also supporting the proposal.

Will there be additional costs after the equity audit is conducted?

- The task force anticipates more funding will be needed as the Town continues to focus on and prioritize this work.
- Depending on Phase II work, additional funding requests might include proposals for a DEI director, office, staff, or standing committee. These proposals would go through the Town's usual approval process.

How can I learn more?

- For more information on Wellesley's DEI Task Force, please visit the webpage: <https://www.wellesleyma.gov/1690/Diversity-Equity-and-Inclusion-in-Welles>.
- Sample equity audits:
 - Worcester:
<https://www.worcesterma.gov/uploads/a4/92/a492f9bfddacc3b271a07f42c7c97485/racial-equity-audit-report.pdf>
 - Beverly:
<https://www.beverlyma.gov/DocumentCenter/View/2891/Beverly-Racial-Equity-Audit-Report?bidId=>