Equity Principles & Practices for Scaling Bendable

Context

The Hub (also known as the Drucker Institute) has developed a lifelong learning system with the aim of supporting the resiliency of individuals, economies, and communities. The first version of the lifelong learning system launched in South Bend, Indiana in June 2020 – under the name "Bendable" – is stewarded by the St. Joseph County Public Library (SJCPL or the Library) and supported by the Hub. The underlying philosophy of the initiative is that **providing equal access to learning opportunities** for personal and job-related growth will **enhance the resiliency** of all who use it and **will lead to equitable**[1] **outcomes**. By building users' individual resiliency, relationships with one another, and involving employers, the lifelong learning system will contribute to economic and community resiliency in each geography in which the system is launched.

Purpose of this Document

Given Bendable's mission and the focus on South Bend's "most under-served and economically vulnerable,"[2] the concept of equity is an important value of the lifelong learning system. To ensure that the goal and outcomes of the lifelong learning platform will be achieved, equity should be a consistent value and goal for all contexts where the system is replicated. This document serves as a resource to assist the Hub team in answering a **central learning question**: **In what ways might the lifelong learning platform live into our goal of scaling such that it produces the most equitable outcomes for the communities of focus?**

To do that, we consider the ways in which equity can be embedded throughout the process of developing, launching, and implementing a lifelong learning system across multiple geographies. These guidelines were developed based on reflections over the course of 18 months through learnings from stakeholder interviews and users, participant observation in stakeholder meetings, consultations with the Hub, data analysis on reach and engagement, and input from FSG team members[3]. The following principles and practices follow several steps the Hub and Library Bendable teams have taken or are currently implementing to center equity.

These principles and practices are not intended to be exhaustive nor is this document a simple checklist. **They are aspirations based on the current state, and should be continually revisited and revised.** As you strive towards these aspirations, they will help unlock more context-specific practices. This list should evolve over time and to each context in which the lifelong learning system is designed and launched. Though these principles and practices were developed with the intention of guiding expansion of the lifelong learning platform to other cities, in some instances, the Hub may consider strengthening their focus on equity by applying these principles going forward in South Bend. The Hub may consider sharing this document with partners as a way to discuss values and

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[1] Angela Glover Blackwell, CEO of PolicyLink and respected thought leader in the field, defines equity as "*Just and fair inclusion into a society in which all can participate, prosper, and reach their full potential. Unlocking the promise of the nation by unleashing the promise in us all."* Source: https://www.policylink.org/equity-in-action/equity-is

[2] Drucker Institute, "South Bend Lifelong Learning System: Forging resilience through Learning," Spring 2019.

[3] In addition to current FSG team members (Hallie Preskill, Nikhil Bumb, and Tori Fukumitsu), thank you to FSG staff Andria Seneviratne, Colleen McCann, and Veronica Borgonovi for their input and review in developing this document.

expectations, as well as the basis of an accountability measure. Finally, we recommend that these guidelines be embedded in future evaluation work.

Suggested Approach for Using this Document

The process below highlights _one_ approach to incorporating a regular practice to reflect on these guidelines, although there are multiple ways to support the integration of these guidelines when designing and implementing a lifelong learning system.

1. Share this guide with all Hub staff and core team members. Ask members to individually reflect on their experiences and the associated principles and practices based on the process components relevant to their roles.
2. Hold a full team session to share individual reflections and jointly discuss the degree to which these principles and practices are reflected in current or prior activities and processes, as well as to brainstorm on how to integrate these guidelines going forward.
3. Make individual and team commitments to specific practices to advance equity, and collectively determine how to hold one another accountable to these goals in a supportive but unyielding fashion.
4. Establish a regular cadence (e.g., monthly) dedicated to revisiting this document, sharing updates on commitments made, discussing challenges and roadblocks, and updating commitments. During these meetings, create time to also share on the ease or degree to which these practices are becoming regular or second nature.
5. Where relevant, add new practices to this document and continuously evolve it to new contexts.

By implementing a similar process to regularly incorporate these guidelines and reflect on these processes, the aim is to ultimately build and refine a capability to consistently and constantly embed and center equity in all functions, team members, and implementation.
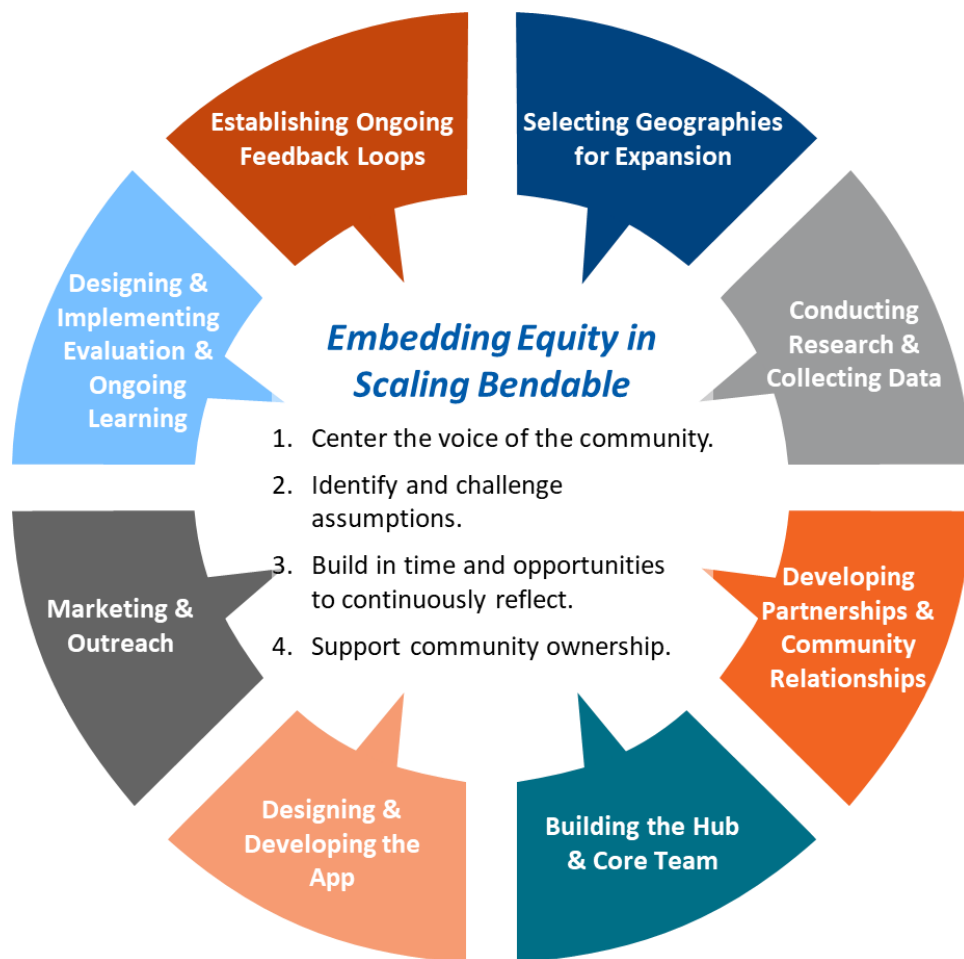
Principles for Embedding Equity

At its core, a lifelong learning system like Bendable is about building a customized platform for each geography that provides equal access to learning opportunities for personal and job-related growth in order to lead to equitable outcomes and enhance the resiliency of all who use it. Living into this philosophy requires a critical focus on embedding equity throughout all processes of the lifelong learning system based on four key principles:

1. **Center the voice of the community.** When entering a new geography, make a concerted effort to engage a diverse set of stakeholders, including communities of color and immigrant populations. Continuously seek and incorporate guidance from the community as an anchor point to guide ongoing decision-making.

2. **Identify and challenge assumptions.** Assumptions are an inevitable part of quick decision-making, but are based on an underlying set of beliefs that can and often are grounded in biases. Take explicit measures to surface and reduce biases, challenge assumptions, and invite a diversity of input to do so.

3. **Build in time and opportunities to continuously reflect.** Engage in dialogue about what is being learned on an ongoing basis, and refine processes based on learnings.

4. **Support community ownership.** In addition to seeking and incorporating input from the community into decision-making, bring community members and local organizations into the decision-making process. Create explicit opportunities to give agency to the local community to drive processes and, ultimately, to own implementation of the lifelong learning system.

These four principles serve as the foundation for the following equity-based practices that support an approach focused on equity at each step of the process to build and implement a lifelong learning system like Bendable.

Practices for Embedding Equity

In this section, we organize the practices for embedding equity by components of the process to build and implement a lifelong learning system in a specific community. These components are not necessarily sequential; some are parallel or crosscutting. For each component, we start with one or more learning questions to prompt considerations for how to center equity in that part of the process and then provide practices that begin to address each learning question.

Embedding Equity in Scaling Bendable

1. Center the voice of the community.
2. Identify and challenge assumptions.
3. Build in time and opportunities to continuously reflect.
4. Support community ownership.

Process Component	Practices for Embedding Equity[4]
Selecting Geographies for Expansion	**LQ1. What defines "need" for a geography to have a lifelong learning system?** 1. Establish criteria for city consideration and determining city need for a lifelong learning system (e.g., population size, percent of population earning below $18

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[4] Racial Equity Tools provides a wide array of resources (tools, research, tips, curricula, and ideas) that can supplement and help implement these practices, starting with increasing individual and team understanding of racial equity as well as how to better incorporate racial equity at every level and step of the process (e.g., training and development, evaluation and learning).

	an hour, strong presence of community anchor or other community organizations, strong social service network).
	LQ2. What could it look like to have a more inclusive process? How can it be designed to ensure as equitable access as possible for geographies with the greatest need?
	2. Consider processes that allow for greater diversity of geographies applying for consideration. For example, a well- and widely advertised open RFP (request for proposal) process can reduce network bias. Alternatively, requesting geographies to submit a LOI (letter of interest) and doing an initial stage of evaluation before requesting additional documentation reduces the burden of an onerous "one-shot" application process.
	3. Limit bias in who finds out about the platform by evaluating how information about the lifelong learning system and the potential for expansion is reaching geographies, as well as which geographies (and who) is able to access the information.
	4. Research and proactively reach out to cities with high need for a lifelong learning system that may not be in immediate networks, may not be good candidates, or may be encountering other barriers to entry/application.
	LQ3. Once geographies are under consideration, how can the selection process be designed to be as inclusive as possible? Are we being transparent enough about our process and decision-making?
	5. Consider who you are asking to be involved in the process and the burden of materials you are asking them to produce to be a candidate for consideration.[5]
	6. Conduct research into the demographic makeup, as well as the historical context, of geographies under consideration and/or geographies that express interest to identify and assess needs and target populations.
	7. Seek input from and ensure the inclusion of members of target communities in the process before making decisions about geography selection (e.g., inclusion of community members in a committee).
	8. Clearly communicate information about the timeline, steps, and requirements (including any limitations and/or flexibility) of the application and selection process, as well as how and why decisions have been made.
	9. Cultivate trusted relationships with those involved in the process from geographies under consideration to enable two-way sharing of candid feedback and information.
Conducting Research & Collecting Data	**LQ1. How can the geography's history and demographics inform the life-long learning system's design and implementation?**
	1. Invest significant time in understanding the local community—including history and demographics—through interviews, secondary research, and observation. Confirm findings with local community members.
	2. Continue to scan and monitor the evolving local context, including changing issues and demographics within the geography.
	LQ2. Are research and data collection processes inclusive?
	3. Where possible, partner with local research organizations or organizations specialized in community-based research to build trust.

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[5] While not directly applicable in a 1:1 manner, Arabella Advisors' "Incorporating Diversity, Equity, And Inclusion In Your Grant-Making Process: A Checklist Of Potential Actions" provides a helpful list of actions and practices to improve diversity, equity, and inclusion in applications practices, many of which can be translated to and/or slightly modified to apply the geography selection and RFP process.

	4. Enlist translators to facilitate data collection from and involvement of non-English speakers, or ask them to conduct interviews / focus groups in participants' primary language and have it translated afterwards.
	5. Compensate interviewees for their time (e.g., grocery or gas gift cards). Not all interviewees may accept compensation but, for fairness, all interviewees should be offered an honorarium. Some interviewees, especially expert interviews, may decline honoraria (by policy or principle) or may ask to donate the fee. Where possible, gift cards to a local store demonstrate an investment in the local community.
	6. Ask permission to interview, take photos, record, and to use information shared. These steps communicate respect, and help build rapport and trust.
	7. Be transparent on how the information provided will be used, as well as what follow-up, if any, will look like. Promise confidentiality / anonymity if needed.
	LQ3. How can this initial research and data collection guide other efforts?
	8. Anchor the design of other research and engagement efforts in these data (e.g., when considering representation among partners, who to interview within the community). For example: • Ensure representation that reflects the local demographic makeup in community interviews, particularly emphasizing representation among target populations.
	9. Disaggregate data and compare with local demographic data to analyze by different identity groups or geographies (e.g., ZIPs of interest).
Developing Partnerships & Community Relationships	**LQ1. What steps should be taken to design equitable partnerships?** 1. Define what it means to be a partner and set clear expectations (for all involved). 2. Distinguish between roles for a partner versus other key stakeholder roles (e.g., input provider, spokesperson). True partnership means an equal voice and say along the way. True partnership does not necessarily mean equal financial contribution, although contributions may come through other resources based on relative strengths. True partnership is about alignment on outcomes and shared responsibilities (i.e., relative roles to achieve outcomes). 3. Identify strengths and relative deficits within the Hub or core team (e.g., limited understanding of local context) and seek out complementary partnerships that acknowledge these relative strengths and deficits. **LQ2. How can relationships with the local community be incorporated into the process in an equitable and inclusive manner?** 4. Ensure representation that reflects the local community within the partner and stakeholder group. Identify and invest in relationships with partners and stakeholders from marginalized communities that have traditionally been left out of decision-making. 5. Elevate local voices that represent the community as partners in the process. 6. Focus on building relationships with partners and local stakeholders with a tone of humility and gratitude in communications and interactions. Doing so helps build the health and strength of community relationships and reduces their transactional nature. 7. Acknowledge contributions and provide attribution. **LQ3. What steps can be taken to support and drive increasing community ownership of the lifelong learning system post-launch?** 8. Research key community organizations and individuals who are leaders and trusted by each community. Invest in relationships with these organizations and leaders who may serve as relationship brokers. Engage in open dialogue to

	understand the needs of each community group, how to build trust, and how to reach the community. 9. Engage community members and leaders to jointly brainstorm and address issues of access, engagement, and retention, including how to identify and mitigate barriers as well as naming the root causes behind those barriers. 10. Facilitate focus groups and/or town halls to invite additional perspectives. When possible – and not creating a resource burden on communities – conduct meetings where communities are in order to build comfort and trust, rather than asking community members to come to the Hub or Core Team. 11. Establish and plan to increasingly transfer ownership and responsibilities to local partners.
Building the Hub & Core Team	**LQ1. How can the core team supporting the lifelong learning system include the lived experiences of those the system aims to benefit?** 1. Ensure diversity of backgrounds and perspectives in the team's composition in a way that reflects the target population and geography. 2. Prioritize bringing community members onto the Hub team and sharing power and ownership in the process. Involve community members, especially people of color, in decision-making. **LQ2. How can the core team foster an inclusive culture and support ongoing learning on equity?** 3. Require and provide implicit bias, equity, and anti-racism training to all staff and team members. 4. Establish practices that regularly reinforce the principles of these trainings (e.g., regularly attending on-going trainings; regular cadence of open, honest conversations about how these principles are being applied. 5. Create accountability mechanisms to support and ensure regular practice, growth, and development on equity and inclusion (e.g., including equity principles and objectives/metrics into performance management and reviews, establishing an external Equity Advisory Board). 6. Engage in conversations about implicit biases, perceptions of the community (combined with sense making of the research on local demographics and history), and the perceived risks with taking a more intentional equity-focused approach (e.g., tension between a nimble/agile approach and pausing for reflection and incorporation of more perspectives).
Designing & Developing the App	**LQ1. How can the app best reflect the local community, including its assets and needs?** 1. Take a human- and community-centered approach to app conceptualization and design by focusing on the community's assets and needs and requirements, and involving the local community perspective in all steps of the process. 2. Ensure representation of diverse community members (based on the local demographic and history research) more directly in the design process – both as input providers as well as members of the design team. Share ownership with community members, and ensure they have direct, representative input as members of the design and local teams at all steps of the process. 3. Seek input from other community members throughout the process and do not rely on team members to fully represent a / their community. Be aware of intersectional identities as well and the different perspectives that team or community members may bring based on intersectionality (e.g., Black men and Black women have different perspectives; recent immigrants and fourth-generation members of the same community have different perspectives). **LQ2. What do we need to know about the history of racism, sexism, ableism, and other root causes of discrimination and inequities in current technology design and development practices? How is this history manifesting in our practices and what steps**

	do we need to take to reframe and incorporate a more inclusive and equitable design and development process for the app? 4. Invest time and resources in capacity building to develop an understanding of the history of racism in current technology design and development practices for the full design and development team. 5. Build in accountability measures and regular checkpoints to evaluate the degree to which these practices are applied or challenged in the design and development process for the lifelong learning system. 6. Ensure the design and feel (e.g., fonts, colors) of the app is inclusive of those with different abilities. 7. Design and conduct a beta test process that is representative of the local community, particularly with an emphasis on inclusion of members of target communities. **LQ3. What steps can help ensure the app continues to reflect the local context post-launch?** 8. Establish processes to update the app regularly based on user feedback. 9. Establish feedback loops to maintain a pulse on relevant local content. Consider and establish, to the degree possible, guidelines for when users are directed to content vs. front-page content is responsive to user interest.
Marketing & Outreach	**LQ1. Does the marketing and outreach plan reflect an understanding of the local context?** 1. Invest in establishing a strong understanding of the local community and demographics as a foundation for guiding marketing and outreach efforts, including time spent in the community by the team. Doing so will help ensure marketing and outreach messages and efforts are locally appropriate and do not unintentionally reinforce or contribute to harmful dynamics and inequities. 2. Explore relationships and marketing and outreach efforts that support equitable access within the community, particularly for target populations. If possible, partner with a local marketing organization with established and trusted relationships in the community. **LQ2. Are marketing and outreach efforts inclusive and equitable?** 3. Use different tactics for different groups. For example, populations experiencing barriers to technology may be best reached through in-person and word-of-mouth approaches and/or require bundled approaches that reduce or remove barriers (e.g., community Wi-Fi access). 4. Use language and images that reflect the local community, especially for targeted campaigns for specific groups. 5. Test messaging and tactics with community members prior to release. 6. Engage a marketing partner that takes an explicit lens to evaluate messages and tactics for language and images that are offensive or have a history in racism, sexism, classism, ableism, or other forms of discrimination.
Designing & Implementing Evaluation & Ongoing Learning	**LQ1. What steps will help ensure an equity-focused evaluation and learning approach?** 1. Build in evaluation and learning, with an explicit focus on equity, from the start of the initiative. 2. Enlist third-party evaluators that have training in implicit bias and culturally competent evaluation practices. 3. Embed the principles and practices in this document into the evaluation and learning work, including but not limited to: • Ground all evaluation and learning processes in an understanding of the local history, demographics, and community context.

	• Ensure a diverse and representative range of perspectives in data collection methods. • Collect demographic data as a part of all data collection efforts. • Disaggregate data and conduct analyses looking at differences between different identity groups. 4. Continually evaluate access, engagement, and retention. Probe on the barriers that limit access, engagement, and retention. Identify root causes behind those barriers and prioritize addressing these root causes. 5. Establish processes to adapt the design of the app, outreach efforts, partnerships, and in-person engagement based on ongoing learnings.
Establishing Ongoing Feedback Loops	**LQ1. What mechanisms can be employed to ensure time and opportunity to seek feedback (including on equity) in an ongoing manner?** 1. Ensure there are regular and consistent two-way feedback loops with partners and community stakeholders. These loops can be used to provide updates on the lifelong learning system, ongoing work, hear updates from partners, and create a channel for feedback. 2. Seek multiple perspectives from each community. Do not rely on 1-2 partners or stakeholders to represent the viewpoints of an entire group or sub-group (e.g., Latinx community, Black women). 3. Request specific feedback from partners and the community on the degree to which the Hub and Core team are centering equity in the lifelong learning system's processes. **LQ2. How can the collected feedback be used?** 4. Allocate time to pause, reflect, and correct work plans. Urgency and efficiency can leave out voices or overlook needed work to address concerns and acknowledge missteps. 5. Revisit and revise plans. Be adaptable and flexible to ongoing learnings (e.g., by engaging in developmental evaluation).