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# 2024 INCLUSION, DIVERSITY, EQUITY, & ANTIRACIST, (IDEA) STRATEGIC PLAN AND SCORECARD REPORT

TO: Town Administration Office  
Attn. Timothy S. Higgins  
16 Lincoln Road  
Lincoln, MA 01773

FROM: Bird Guess  
Racial Equity Group  
391 Las Colinas Blvd, Ste. 130-350  
Irving, TX 75039  
T. (888) 369-1339  
E. [bird@racialequitygroup.com](mailto:bird@racialequitygroup.com)  
W. [www.racialequitygroup.com](http://www.racialequitygroup.com)

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## Abbreviations Used Throughout This Document

- Town = Town of Lincoln
- IDEA = Inclusion, Diversity, Equity, Anti-racist
- ER = Elite Research
- REG = Racial Equity Group
- BECMA = Black Economic Council of Massachusetts
- SDO = Commonwealth State Supplier Diversity Office

## Background and Scope

The Town of Lincoln (Town) is a small, New England community of 6,000 residents (including approximately 2,000 residents of Hanscom Air Force Base of which Lincoln is a proud host community), with a land mass of 14 square miles, located 12 miles west of Boston in Middlesex County. The Town's many acres of protected fields, woods, and agricultural land is testament to the farsighted land use planning that began in the 1950s, underpinned by a strong commitment to land conservation and environmental stewardship. Recognizing the impact this had on housing affordability, the town supported development of multi-family housing beginning in the 1960s. The town continues to be committed to exceeding affordable housing requirements through a variety of creative solutions ranging from group homes to affordable ownership condominiums, to income-limited units at our senior living complex. The governance of the Town benefits from a deep commitment to civic responsibility and volunteerism, and with strong support for and participation in our open town meeting form. Civic activism has helped put Lincoln in the forefront on affordable housing, environmentalism, educational opportunity, and historic preservation.

The racial demographics for the Town show that the majority of residents are White, and people of color are minorities. The following demographic data for residents of Lincoln (is disaggregated by race and ethnicity:

- Black or African American alone, 1.0 percent
- Asian alone, 6.8 percent
- Two or More Races, 4.3 percent
- Hispanic or Latino (of any race), 12.7 percent
- White alone, not Hispanic or Latino, 74.2 percent

*Source: Census ACS Survey 2021, 5-year Estimates, percentages may not add up to 100 because Hispanic residents can report being of one or more races.*

After the murder of George Floyd in May 2020. Residents of the Town responded to the tragedy by organizing vigils, reading, and discussing books that address systemic racism, and by asking Town government to explicitly examine the systems and actions of the Town. Through these conversations, Town residents have made it clear that they want to engage in candid discussions about what diversity, equity, inclusion, and anti-racism look like in Lincoln, and to establish a long-term, Town-led group that will keep Lincoln's vision of fostering and supporting diversity at the center of all we do. A number of themes have emerged that help to inform future work:

A. **Understanding terminology** — The words diversity, equity, inclusion, and anti-racism get used in many ways and many contexts. How do we create a shared understanding of their meaning and implications for Lincoln?

B. **Understanding Lincoln** —What is the lived experience for residents who identify as being a member of a historically underrepresented group? What do out-of-towners experience when they visit and interact with residents? Why isn't Lincoln more diverse? To what extent might solutions for addressing IDEA change specific characteristics many residents hold dear?

C. **Who do we want to be?** — What are the problems we are trying to solve, and for whom? Are we addressing all the IDEA elements concurrently? Is it more pragmatic or impactful to focus on one specific element at a time?

D. **Measuring progress** — How will we know that we have made a positive difference in addressing the targeted problem, improving specific IDEA elements? What is our town's current state relative to the problem? How does Lincoln compare to other towns? To which towns should we compare ourselves?

In February 2021, the Select Board voted to establish the Inclusion, Equity, Diversity, and Anti-Racism Committee (IDEA). IDEA members were appointed in April 2021, and the group began meeting in May 2021. Racial Equity Group (REG) was awarded the contract to assist the Town in the creation of an IDEA strategic plan, including a gap and barrier analysis to assess whether any barriers exist that make it challenging for the Town to move forward towards integrating diversity, equity, and inclusion and anti-racism in the workplace, and in Town.

## Methodology

### Disparities and Inequities

Our IDEA approach focused on identifying inequities and providing systemic solutions and root cause remedies by conducting a IDEA gap and barrier analysis. The gap and barrier analyses commenced with identifying *significant and/or persistent disparities*, which are defined as “inequities.” This approach included performing statistical analyses to benchmark the Town’s workforce representation against quantitative validated benchmarks including the Town’s overall population and the Relevant Civilian Labor Force (RCLF), which is the available workforce for the occupations found within the Town and each department. The analysis examined disaggregated data and investigated inequities between the expected and actual representation rates in the workforce and focused on data from three key phases of the Town’s employment life cycle: *hiring, promotions, and retention*. If inequities are found it indicates that observed outcomes, which are a demographic group’s *employment representation*, is significantly different from expected outcomes, which are employment representation levels equal to a demographic group’s *availability for employment*, and the inequities or outcomes found are not likely due to chance alone but may be indicative of other underlying reasons.

Following the analysis of disparities and any inequities, REG performed a barrier analysis which involves reviewing official Town policies and practices to investigate how they may be influencing or contributing to any inequities detected. Relevant data and materials provided by the Town were reviewed and analyzed to uncover potential barriers that may contribute to any inequities identified. Once all analyses were performed, REG synthesized data from the gap and barrier analysis. The key findings and recommendations detailed within this report are based on a combination of both quantitative and qualitative analytic results. REG then used the data to draw conclusions, document key issues, and develop actionable recommendations to help advance IDEA within the Town.

REG performed all analyses within the following four equity domains, where racial inequities are typically produced and sustained, often unintentionally by public and private sector organizations:

- Employment (hiring, promotions, retention)
- Service Delivery and Programs (access, quality, treatment)
- Procurement and Contracting
- Stakeholder and Community Engagement (board and committee members)

REG also determined if best practices for advancing IDEA were *present and effective*, and identified any inequities within the desired focus areas.

REG also assessed quantitative and qualitative information related to but not limited to the following:

- IDEA is an organizational priority Town-wide with dedicated talent, resources, and accountability structures established
- Town measures (collects), monitors (tracks), and manages (evaluates) data disaggregated by race and ethnicity across all operations

- Town leaders at the department level have taken ownership of IDEA by establishing goals, setting expectations, leading by example, and implementing policies and practices to advance IDEA
- Established partnerships exist with external stakeholders who have a shared purpose to advance IDEA
- Existing policies and practices that advanced or impede IDEA have been identified and addressed
- Budget and resource allocation decisions are performed with an equity mindset

In addition, REG provided guidance related to best practices for municipalities to implement for the Town's consideration.

Why the equity gap and barrier analysis will be useful to the Town:

- Analyses provide information about equitable opportunity for all stakeholders
- Identify if historically excluded groups (e.g., people of color) within the Town have equitable employment opportunities relative to their availability for that work, and whether certain groups are substantially underrepresented and underutilized in hiring and promotions
- Analyses will identify any barriers that people of color may face in the local marketplace that might affect their ability to compete for Town job openings and promotions

Following the equity gap results, REG performed a barrier analysis which involves reviewing official Town policies and practices to investigate how they may be influencing or contributing to any inequities detected in the equity gap analysis. Relevant data and materials provided by the Town were reviewed and analyzed to uncover potential barriers that may contribute to any inequities identified.

Next, REG developed and conducted a Racial Equity Audit Assessment Survey that examined IDEA efforts across the Town. The survey assessed employee, board and committee member perceptions and attitudes on Town's current level of commitment to advancing IDEA across six core competencies: institutional, leadership, capacity building, data, and disparities, belonging and inclusion, knowledge, and competence. The web-based survey responses were collected between January 24<sup>th</sup>, 2023, through February 7<sup>th</sup>, 2023, and were sent via email to all 3,428 Town employees, board, and committee members. A total of 1,571 Town employees, board and committee members participated in the survey for a response rate of 45.6%. A separate web-based community survey was also conducted to assess resident perceptions and attitudes on equitable access to Town services, facilities and programs, equitable treatment by Town employees, and equitable quality of services, facilities, and programs. A total of 1,571 Town residents participated in the community survey for a response rate of 45.6%.

Lastly, REG conducted focus groups to interview and listen to employees, board and committee members, and residents from across The Town. Individuals were placed in groups with others from similar backgrounds, job level, or function. Questions in the focus group protocol examined quality of life, opportunity to advance, racial biases and inclusion. If participants were uncomfortable sharing in the focus group interviews, REG provided opportunities for participants to leave voluntarily or contribute by phone or email to share their experiences. Once all interview and focus groups were conducted, REG performed a content analysis of the qualitative data (i.e., interview and focus group notes) to identify and analyze themes that emerged. To perform the content analysis, an REG content analysis expert independently analyzed all responses and coded for themes (i.e., sentiments that were stated and espoused consistently, several times over the course of many focus groups). Once the expert finished coding, two additional content analysis experts independently reviewed the identified themes to ensure accuracy. The only themes detailed within this report are those discussed by multiple participants from the focus groups. Six in-person focus groups were held in the Town Hall, with two groups for staff members, two for board members, and two for residents. The Town managed the recruitment of all participants. Although the demographics of the participants were not obtained, two out of the 26 participants self-identified as a person of color.

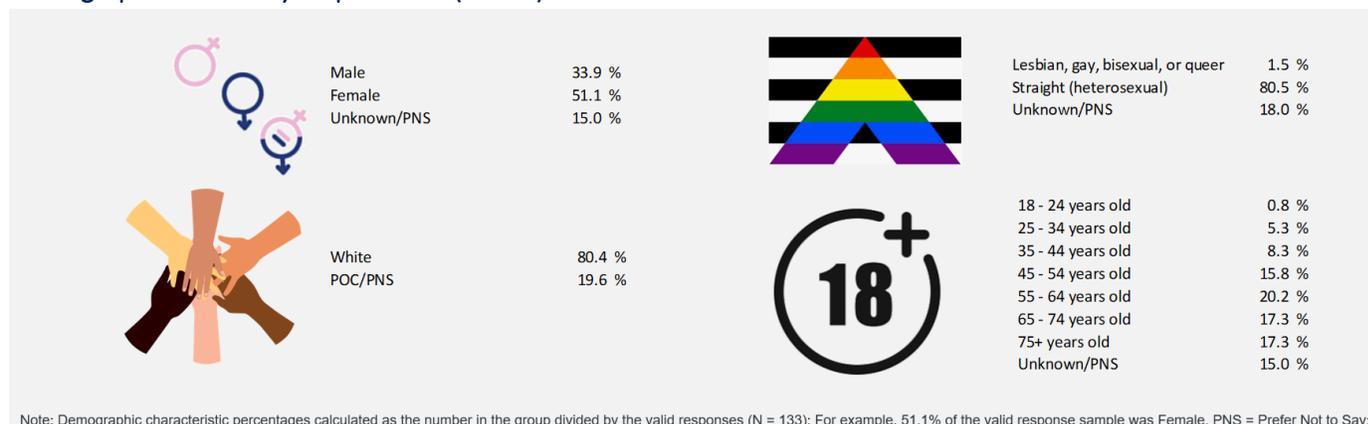
Once all analyses were performed, REG synthesized data from the equity gap and barrier analysis, audit assessment survey results, community survey results, and focus group interviews. The key findings and recommendations detailed within this report are based on a combination of both quantitative and qualitative analytic results. REG then used the data to draw conclusions, document key issues, and develop actionable recommendations to help advance IDEA within the Town. This gap and barrier analysis and any resulting action plan was voluntarily prepared as a reaffirmation of the Town’s commitment to equitable opportunity throughout Town operations, services and programs and are not admissions that either minorities or women were or are subjected to discrimination in any way in violation of federal, state or local fair employment practice laws. The primary goal of the Gap and Barrier Analysis is to help provide the most efficient, effective and productive services possible throughout the Town for all stakeholders, and remove any barriers to equitable opportunity in Town government employment, services and programs, purchasing and procurement, and stakeholder engagement.

### IDEA Audit Assessment Results Summary

In order to provide a valid measurable benchmark of Inclusion, Diversity, Equity and Anti-racism, REG conducted the inaugural Inclusion, Diversity, Equity, and Antiracism Audit Assessment Survey (IDEA) in January 2023 to help the Town establish an IDEA baseline, fully meet its mission and vision, identify more effective approaches for ensuring equal opportunity for all stakeholders, as well as potential training needed to support staff and leadership for advancing IDEA. IDEA for the Town of Lincoln is defined as “monitoring and reducing racial disparities, equal opportunity to be employed within the Town of Lincoln, equal access to career development, and promotional opportunities, equal opportunity and access to do business with the Town of Lincoln, residents and visitors receive fair and respectful treatment, equal opportunity to work, live and access quality services within the Town of Lincoln.”

Between January 24th 2023 and February 9th 2023, the Town of Lincoln invited 256 employees and board/committee members to participate in the IDEA Audit Assessment. The Town achieved a valid response rate of 86.9% consisting of 133 employees, board and committee volunteers. The following is a highlight of key findings from the audit assessment and is the foundational first step to advancing IDEA. The assessment measures the most important competencies and actions for producing and sustaining IDEA within the Town of Lincoln. *(full audit assessment report is available on Town website)*

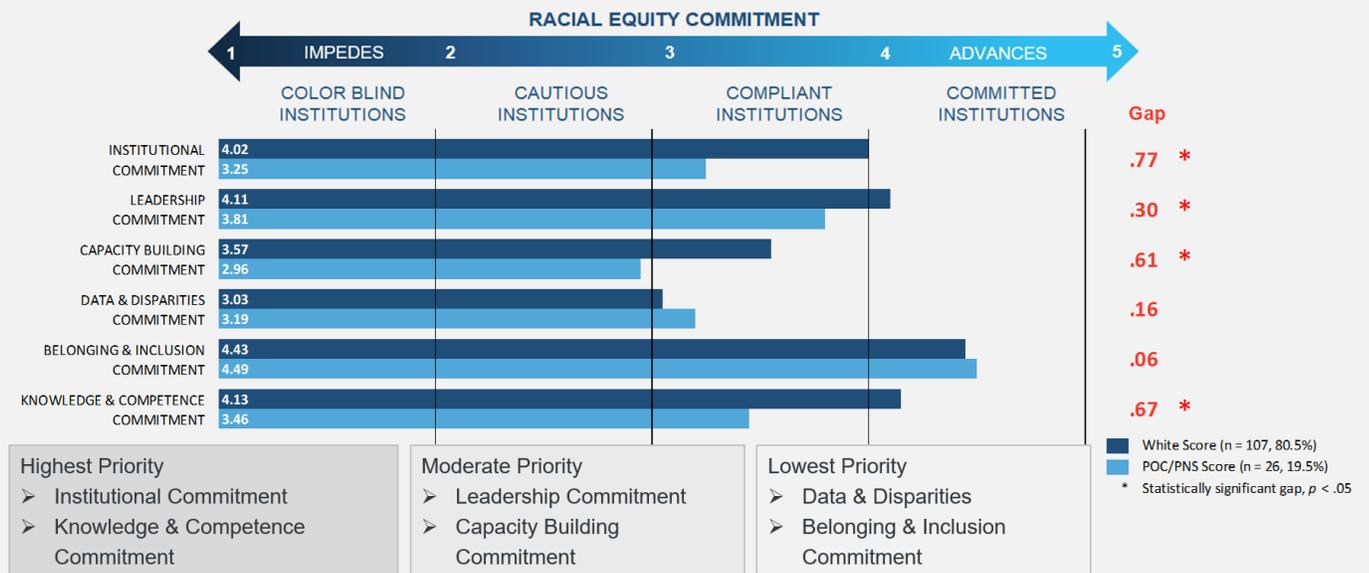
### Demographics of survey respondents (n=133)



Note: Demographic characteristic percentages calculated as the number in the group divided by the valid responses (N = 133); For example, 51.1% of the valid response sample was Female. PNS = Prefer Not to Say;

The results of the audit assessment revealed the Town's *strongest IDEA competency is belonging and inclusion, which indicates employees feel valued, accepted and like they belong while working within Town government.* The Town can leverage this strength as it begins to prioritize development in the remaining five core competencies; with an immediate focus on institutional commitment, data disparities, and capacity building. Developing these competencies will include developing a process for collecting data disaggregated by race/ethnicity across Town operations, partnering with external organizations to advance IDEA (e.g. Black Economic Council of Massachusetts, State Supplier Diversity Office, National Forum Black Public Administrators Boston), and developing scorecards and key metrics for tracking IDEA progress.

## White and People of Color (POC/PNS) Consensus on Racial Equity Commitment



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## What is our ACTUAL Level of IDEA Commitment?

### OVERALL COMMITMENT

Aggregate levels of commitment can be blind spots for organizations. In order to truly apply an IDEA mindset requires disaggregating data to focus on the racial consensus gap between White employees and board/committee members and employees and board/committee members of color (POC/PNS), which has revealed that the Town of Lincoln has an actual commitment score of not 3.95, but 3.61. The road to commitment for the Town of Lincoln will require closing the gap between White and POC/PNS scores from .37 (see appendix page 34) to at most, a difference of .20 between the two groups, as well as increasing the overall score to at least 3.75. The current results of the racial consensus still identifies the Town on the below continuum as **compliant** (see appendix continuum definitions).



To maintain confidentiality and anonymity, average scores for POC and the unknown/PNS group were combined and compared to White group scores. Results were compared to Whites vs POC only to understand how the direction of findings changed by combining the groups. Overall magnitude of gap differences changed, but findings and their direction were generally the same.

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## Employment Availability Analysis Results

REG determined the reasonable recruitment area for the Town of Lincoln as the geographical area including Massachusetts' cities, towns and counties where significant amounts of Town employees and applicants reside and/or the Town could reasonably seek workers with the requisite skills to fill open job positions. The Town currently sources talent mostly from Middlesex and Norfolk counties, and some from Worcester county. REG included the initial three counties and also identified additional counties. The following Massachusetts counties should be considered the Town's *reasonable recruitment area*: *Suffolk, Middlesex, Essex, Norfolk, Plymouth, and Worcester counties*. When selecting the reasonable recruitment area, it is important not to select an area in such a way that it would unintentionally exclude racially diverse groups. The average commute time for the State of Massachusetts and the Boston metro area, including the Town and peer towns and cities was 30 minutes each way. However, potential employee applicants may reasonably commute to the Town in up to 60 minutes each way, which expanded the reasonable recruitment area to the resulting six counties.

After identifying the reasonable recruitment area, REG conducted an *availability analysis*. "Availability" is an estimate of the proportion of each race/ethnic group available and qualified for employment within the Town for a given job group in the reasonable recruitment area. Availability indicates the approximate level at which each race/ethnic group could reasonably be expected to be represented in a job group within the Town. REG examined the availability of diverse talent for Town employment to use as benchmarks against which to compare the actual representation of talent based on race/ethnicity and gender Town jobs. Comparisons between representation and availability enabled REG to determine whether certain racial or gender groups are underutilized relative to their availability for Town employment.

### Figure 1. Overall Availability Estimates by Race/Ethnicity and Gender

Data is composite of EEOC job group categories table (EEOALL6R) Officials/Administrators, Professionals, Technicians, Protective service: Sworn and Non-sworn, Administrative support, Skilled Craft, Service/Maintenance within the following Massachusetts counties; Suffolk, Middlesex, Essex, Norfolk, Plymouth, and Worcester. Source 2018 Census American Community Survey 5-Year Estimates Equal Employment Opportunity (see appendix for more information)

Racial/Ethnic Group	Total Availability Metro Counties
Hispanic or Latino	10.5%
White, non-Hispanic or Latino	72.3%
Black or African American	7.3%
Asian American	7.5%
2 or more races or some other race	2.4%

Overall, the availability of people of color for Town jobs is 27.7 percent, indicating that people of color might be expected to fill about **27.7 percent** of various job positions within the Town.

## Employment Representation Analysis Results

REG attempted to measure the current representation of the Town's entire workforce by race/ethnicity and gender using internal documentation (EEO-4 reports) provided by the Town and are required for state and local governments with 100 or more employees to be submitted biennially to the Equal Employment Opportunity Commission, a federal agency responsible for enforcing federal laws that make it illegal to discriminate against a job applicant or an employee because of the person's race, color, religion, sex, gender identity, sexual orientation, national origin, age, disability or genetic information. For the year 2021, the Town had less than 100 employees and was exempt from this requirement, so data was not available.

Figure 2 below, shows the Town's overall representation using survey data responses of 40 employees to generalize demographic data for the entire organization by race/ethnicity, compared to the availability of each group within the Town's relevant labor market and recruitment area. There were 48 employee responses on the Town's IDEA employee survey, but 8 employees did not indicate their race/ethnicity. REG recommended the Town begin collecting employee data by race/ethnicity, to determine a more accurate representation of the Town's workforce and be able to identify disparities and inequities.

**Figure 2. Benchmarking Town of Lincoln Current Workforce Representation**

Racial/Ethnic Group	Town Workforce Representation (n=40)	Availability Metro Counties
Hispanic or Latino	0.0%	10.5%
White, non-Hispanic or Latino	97.5%	72.3%
Black or African American	0.0%	7.3%
Asian American	0.0%	7.5%
2 or more races or some other race	2.5%	2.4%

REG also examined representation analysis results by Town job group/category. In order to conduct meaningful representation workforce analyses, Town employees must first be grouped by occupational duties into segments having broad similarities. These macro-groupings, called EEO-6 state and local government categories, are defined in the EEO-4 Report issued by the Equal Employment Opportunity Commission. The job categories are the following:

- Officials and Administrators
- Professionals
- Technicians
- Protected Service Workers (Sworn and non-Sworn)
- Office and Clerical Workers
- Skilled Craft Workers
- Service Maintenance Workers

The Census Bureau produces the EEO Tabulation 2014-2018 (5-year ACS data) for Federal agencies responsible for monitoring employment practices and enforcing civil rights laws in the workforce, and for all employers so they can measure their compliance with the laws. The EEO Tabulation 2014-2018 (5-year ACS data) serves as the primary external benchmark for conducting comparisons between the racial, ethnic, and sex composition of each employer's workforce to its available labor market.

The following four agencies sponsor this tabulation:

- Equal Employment Opportunity Commission (EEOC)
- Department of Justice’s Employment Litigation Section of the Civil Rights Division (DOJ)
- Department of Labor’s Office of Federal Contract Compliance Programs (OFCCP)
- Office of Personnel Management (OPM)

**Figure 3. Benchmarking Town of Lincoln Representation by Job Group** \*Job Group Category definitions are located in the Appendix

EEO Job Category *	Availability Metro Counties						
	Male	Female	Hispanic	White	Black	Asian	2 or more races
Officials and Administrators	55.4%	44.6%	5.1%	81.8%	4.3%	7.2%	1.6%
Professionals	45.2%	54.8%	5.4%	76.4%	5.0%	11.3%	2.0%
Technicians	50.4%	49.6%	14.7%	62.8%	9.3%	10.6%	2.5%
Protected Service Workers (Sworn and non-Sworn)	82.4%	17.6%	9.7%	75.2%	12.5%	0.1%	2.5%
Office and Clerical Workers	38.2%	61.8%	9.4%	75.4%	7.5%	5.5%	2.2%
Skilled Craft Workers	92.6%	7.4%	12.9%	75.7%	4.8%	4.2%	2.4%
Service Maintenance Workers	54.0%	46.0%	20.5%	58.1%	12.1%	5.7%	3.6%

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EEO Job Category *	Town Workforce Representation						
	Male	Female	Hispanic	White	Black	Asian	2 or more races
Officials and Administrators	45.5%	54.5%	0%	95.7	0%	0%	4.3%
Professionals	--	--	--	--	--	--	--
Technicians	--	--	--	--	--	--	--
Protected Service Workers (Sworn and non-Sworn)	--	--	--	--	--	--	--
Office and Clerical Workers	--	--	--	--	--	--	--
Skilled Craft Workers	--	--	--	--	--	--	--
Service Maintenance Workers	--	--	--	--	--	--	--

The Town did not have any employee data by race/ethnicity for job groups. REG recommended conducting a survey of the Town’s officials and administrators for this report. REG also recommended the Town begin to survey employees in the remaining categories by December 31<sup>st</sup>, 2023, in preparation for the 2023 EEO-4 Report.

### Employment Equity Gap Analysis Results

Although information about the overall representation of employees and representation by job group can be insightful alone, it can be more insightful when the data is compared with the level of representation one might expect based on their availability for that work. As part of the IDEA gap analysis, REG attempted to compare the representation of racial and gender groups employed by the Town overall and by job group, with the percentage of available workers in the labor market and by job group, that those available workers might be expected to be hired based on their availability for that work. REG calculated disparity indices for each group based on race/ethnicity and gender for job groups by using the following formula: dividing percent of representation by percent availability and multiplying by 100.

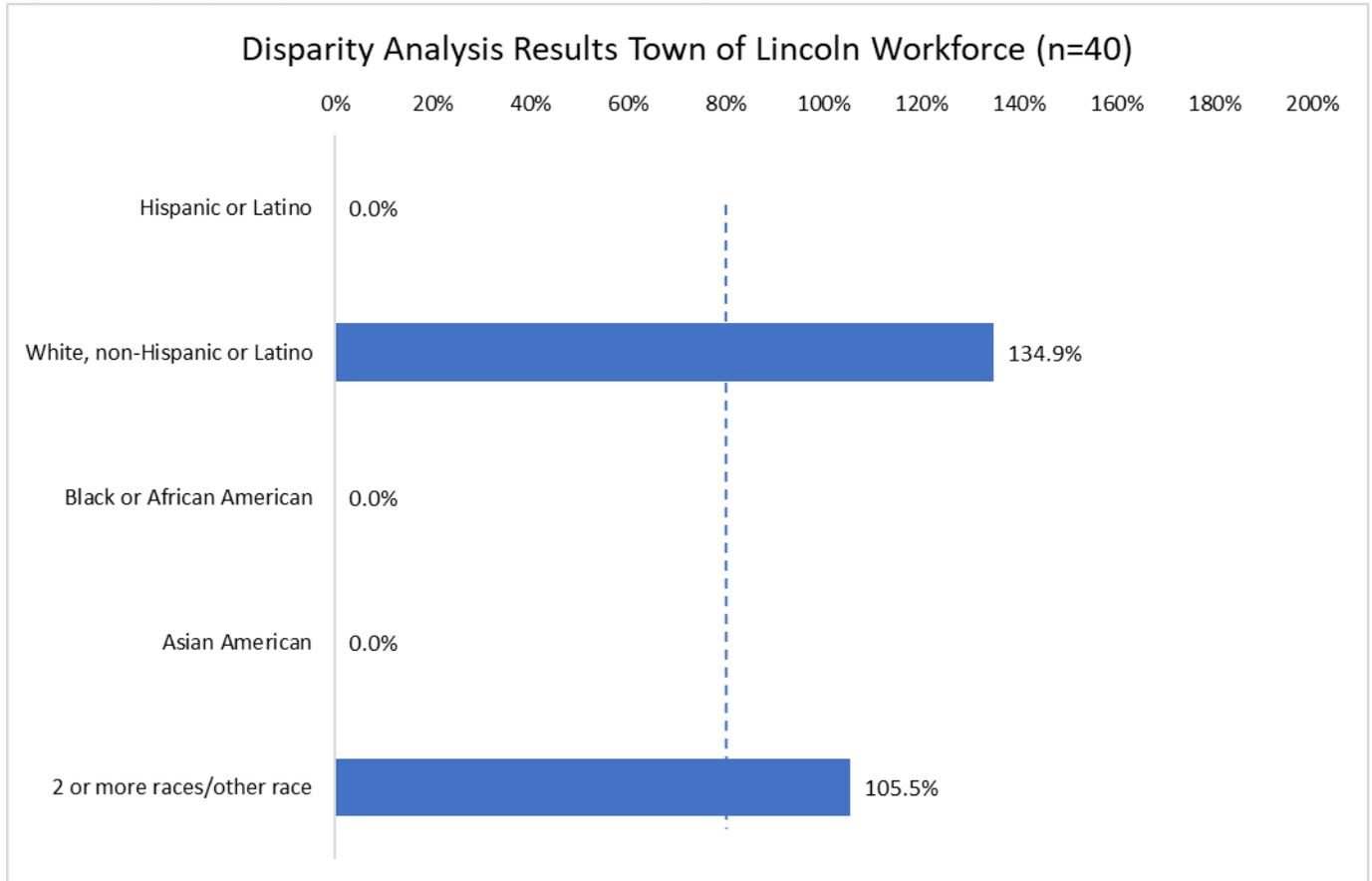
$$\frac{\% \text{ participation}}{\% \text{ availability}} \times 100$$

A disparity index of 100 indicates an exact match between representation and availability for a particular group overall, and for a particular job category, also called *parity or achieving equitable outcomes*. An index score of less than 100 indicates a disparity between representation and availability. *A disparity index of less than 80 indicates a significant disparity between representation and availability and would trigger racial or gender inequity.*

Figure 4 on the following page presents disparity indices for overall representation of Town employees during the analysis study period of 2023. The line down the center of the graph shows a disparity index level of 100, which indicates parity or representation is equal to availability. A line is also drawn at a disparity index level of 80, which indicates a significant disparity or racial inequity. As shown in Figure 4, Hispanics, Blacks and Asians

exhibited a disparity index below 80 for overall employment representation during the analysis period, indicating significant underrepresentation and racial inequity for those groups. White employees are overrepresented by 35 percent, based on their availability. Employees of 2 or more races shows this group is slightly overrepresented by 4 percent.

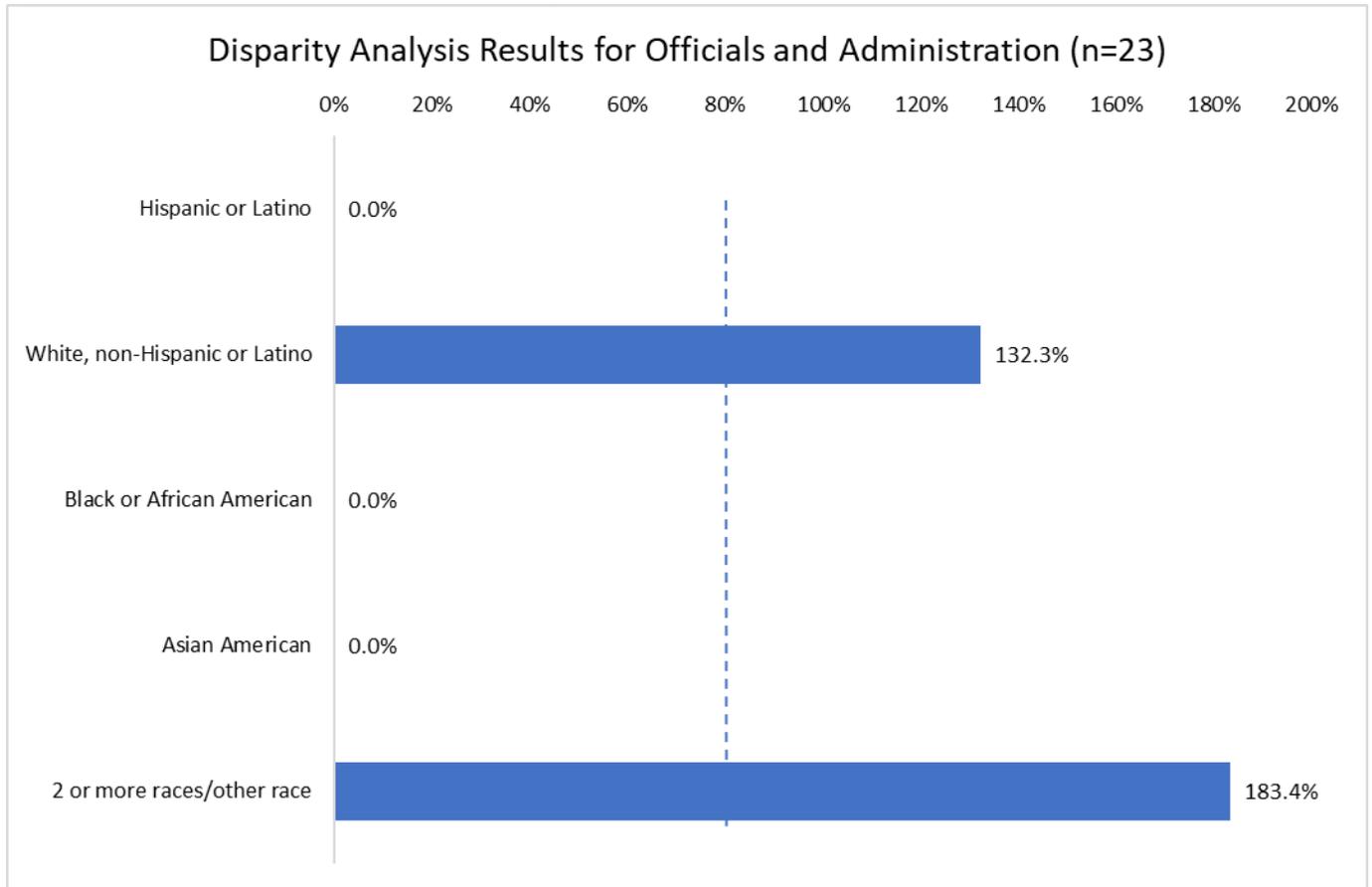
**Figure 4. Disparity Analysis Results for Overall Workforce Representation**



Once final availability estimates were determined overall, REG attempted to determine availability by each job group and compared the representation of incumbents (current Town workforce by race and ethnicity) in each job group to their corresponding availability. The Town was only able to provide data for the Officials and Administration job category at this time. REG will recommend in our final observations and findings that the Town should implement practices to collect and track data of employee demographics, primarily race/ethnicity and gender. Despite not having sufficient data to conduct disparity and inequity analysis within the remaining job categories, REG provided availability data by race/ethnicity within each job category, and once the Town has collected employee data, the Town will be able to establish baselines and benchmarks for each job category and identify if any racial inequities exist.

As shown in Figures 5 on the following page, Blacks, Hispanics, and Asians are significantly underrepresented in the Officials and Administration job category, triggering racial inequity. Whites are overrepresented by 32 percent and employees who identified as 2 or more races are overrepresented by 83 percent, however this number is misleading due to small sample size of this job category, and only one employee identifying as 2 or more races.

Figure 5. Disparity Analysis Results by Job Category



**Officials and Administrators:** Occupations in which employees set broad policies, exercise overall responsibility for execution of these policies, direct individual departments or special phases of the agency’s operations, or provide specialized consultation on a regional, district or area basis. Includes: department heads, bureau chiefs, division chiefs, directors, deputy directors, controllers, wardens, superintendents, sheriffs, police, and fire chiefs.

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## Barrier Analysis: Policies and Practices Review

Identifying significant racial disparities can reveal if racial inequities are present within the Town. Once quantitative data is collected and analyzed to determine if racial inequities exist, the next step is to identify and understand if any barriers are present. *Barriers are policies or practices within the Town that may be unintentionally producing and sustaining racial inequities.* REG reviewed policies and practices within Town employment, services and programs, procurement and contracting and stakeholder engagement (board/committee members).

### Employment

**Recruitment and sourcing talent:** When a job vacancy occurs because of a resignation, retirement, or creation of a new position, the respective Department Head meets with the Assistant Town Administrator to develop a recruitment plan. The Town initially attempts to fill the position internally and if qualified candidates are available, the Town invites applications from its internal staff. If potential internal candidates are not available, the Town will recruit external candidates. All Departments are encouraged to make best efforts to attract candidates who represent a broad cross section of society. Outreach efforts mainly consist of advertising in trade journals (Mass Municipal Association, Municipal Police Training Committee, etc.), and on the Town's website. There is no evidence the Town has a targeted recruitment strategy to attract racially diverse candidates and advertise career opportunities to potential candidates of color. Word of mouth and personal relationships are the Town's greatest tool for cultivating candidates. Data collection to understand the demographics of the Town's applicant pool is not currently practiced.

**Job descriptions and qualifications:** There is no evidence that the Town currently has a process for reviewing job advertisements-descriptions and qualifications to neutralize potential biases and ensure qualifications and required skills and experience are a business necessity, and that alternative skills, training, or experience can satisfy the required qualifications.

**Interviewing:** The Town's hiring and interviewing process generally has seven phases. Phase one involves a paper screen of applications to determine which candidates will be invited to interview. Interviews are generally conducted by a team led by the Department Head, including members of their staff – and sometimes the HR Director. For senior management positions, the Town Administrator and HR Director assemble the interview team. The Town has implemented a practice of involving representatives of key workplace stakeholder groups and sometimes reaches out to community organizations and neighboring communities requesting them to serve as interview panelists to bring in multiple perspectives, however this practice appears to have high discretion and is applied inconsistently. Phase two involves an interview panel. Interview panelists meet in advance to develop standardized questions and evaluation criteria. Phase three includes a Town tour, and a visit with other key staff members and departments. Phase four is the deliberative stage where the panel applies the selection criteria and recommends its preferred candidate to the Town Administrator. At this stage, Departments are encouraged to consider diversity goals, especially where the panel determines that two finalists are equally well-qualified. Phase five is the due diligence stage where the HR Director and others conduct background checks and negotiate hiring terms and conditions. Phase six is the formal vote to appoint which is made by the Select Board, at the recommendation of the Town Administrator. Phase seven is the onboarding process, where the HR Director and the respective Department Head help the candidate complete the necessary payroll and benefit forms and begin the training and acclimation process. There is no evidence a required diverse candidate pool and diverse interview panel is an established practice for selecting potential job candidates.

**Promotions:** The Town does not have a clear policy or practice that outlines the promotion process. It appears promotion criteria and decision making are up to the discretion of individual Department heads and/or managers. The Town initially attempts to fill vacant positions internally. If qualified candidates are available, the respective Department head meets with the HR Director and Town administrator to suggest inviting applications from internal staff. If potential internal candidates are not available, the Town will recruit external candidates. When an internal candidate is promoted, their salary is determined through discussion among the Department Head, HR Director, and Town Administrator, consistent with the Town’s Pay and Classification System or the governing Union Contract, whichever is applicable to the specific position. Efforts are made to establish compensation at a rate that fairly reflects the increased responsibility, while maintaining reasonable pay differential with positions graded immediately above and below the position to which the staff member is being promoted.

**Compensation and salary:** Analyzing employee compensation and salaries for racial equity is beyond the scope of work requested in this analyses. The Town Administrator and HR Director have begun to evaluate compensation practices with a diversity lens and the Town stated it intends to engage the necessary consultants to review compensation systems to develop recommendations to help the Town achieve desired goals.

**Workforce separations and retention:** Collecting, tracking, and managing data on voluntary and involuntary employee separations, disaggregated by demographic group is not currently practiced.

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## Employment Best Practices Gap Analysis

Evidenced-based Best Practices	Town Current Status
Collects demographic data on applicants and current employees (e.g. race/ethnicity, gender)	
Conducts disparity analysis to identify if inequities exist within overall employment representation and by job groups	
Targeted recruitment strategy to attract diverse candidates (e.g. race/ethnicity, gender)	
Reviews job descriptions for biases and validates qualifications, required skills, and experience as valid business necessity	
Requires diverse candidate pools before selection decisions	
Requires diverse interview panels and all panelists are trained on biases	
Develops standardized and transparent policies and practices for pathways to promotions	
Develops formal mentoring program available for all employees	

-  **Not started:** practice not present, inactive or currently undetermined
-  **Emerging:** discussions and considerations of the practice are awaiting approval decision
-  **Establishing:** practice partially in place or process for implementation has started
-  **Reinforcing:** practice currently present and active

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## Services and Programs

In order to gauge if the Town provides services and programs equitably to all residents and stakeholders, REG conducted focus groups and collected feedback from a Town-wide community survey. Six in-person focus groups were held in the Town Hall, with two groups for staff members, two for board members, and two for residents. The Town managed the recruitment of all participants. Although the demographics of the participants were not obtained, two out of the 26 participants self-identified as a person of color. One participant relayed that one individual who had signed up for the focus groups had told them they would not be attending because “nothing would change because of it.” The purpose of the focus groups was to interview and listen to employees, board and committee members, and residents from across The Town and understand in-depth, their lived experiences in the Town. Participants were placed in small groups with others from similar backgrounds, job level, or function. Questions in the focus groups focused on their experiences and perceptions of equity, opportunity, biases, and inclusion in Lincoln. If participants were uncomfortable sharing in the focus group interviews, REG provided opportunities for participants to leave voluntarily or contribute by phone or email to share their experiences. Once all interviews and focus groups were conducted, REG performed a content analysis of the qualitative data (i.e., interview and focus group notes) to identify and analyze themes that emerged. To perform the content analysis, an REG content analysis expert independently analyzed all responses and coded for themes (i.e., sentiments that were stated and espoused consistently, several times over the course of many focus groups). Once the expert finished coding, two additional content analysis experts independently reviewed the identified themes to ensure accuracy. The only themes detailed within this report are those discussed by multiple participants from the focus groups. Themes from the focus group participants included the following: lack of diversity and diverse interactions within Town leads to racial biases when interactions do occur, improving affordability of Lincoln, the Town may be perceived from others in surrounding areas as elitist and exclusive.

The Community survey collected responses from 422 Lincoln residents. Participants answered 24 statements related to the Town. The majority of the statements focused on obtaining stakeholder feedback on three key measures where racial inequities are typically found for public sector municipalities providing services and programs: *access, quality, and treatment*. Additionally, respondents answered demographic and background questions in order to create a more robust profile of the respondents. Racial demographics of the community survey participants are presented below.

Race/Ethnicity	N	Percent
Asian or Asian American	14	3.3%
Black or African American	8	1.9%
Hispanic or Latinx (non-white)	8	1.9%
White	261	61.8%
Multiracial	11	2.6%
Unknown/PNS	6	28.4%

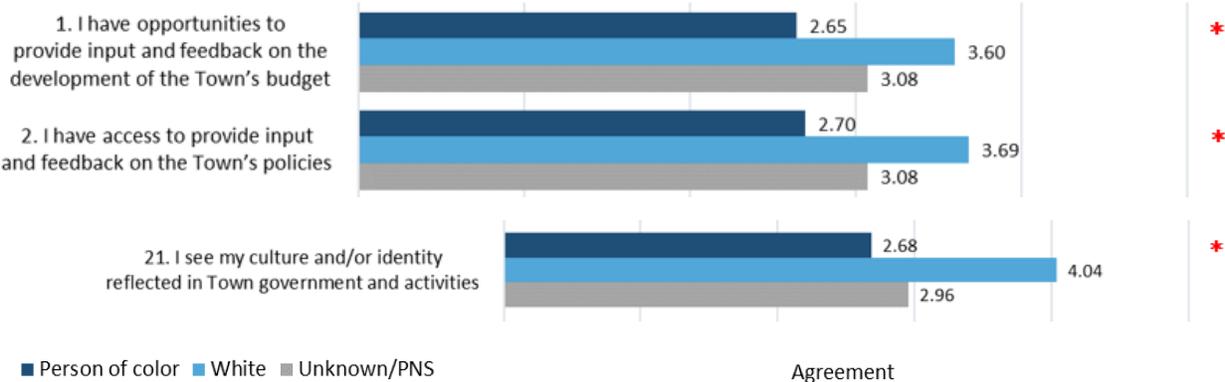
Overall, Town of Lincoln residents agreed they have access to quality fire, police, emergency, and rescue services, and receive fair/respectful treatment by Town employees, access to quality parks and recreation programs, access to groceries and household necessities, and access to quality health and human services. However, further analysis segmented by minority racial/ethnic background provides important context.

- People of color had significantly lower scores on 10 of the 24 statements (42%)
- There were no statements where people of color or people of unknown race/ethnicity had significantly higher levels of agreement with any of the statements than White participants
- 19 of the 24 statements (80%) show that people of color had lower agreement than Whites

Three of the largest and statistically significant gaps between people of color and White participants are listed below:

- opportunities to provide input and feedback in developing the Town’s budget (Q1)
- input and feedback on the Town’s policies (Q2)
- belief that they see their culture and/or identity reflected in Town government and activities (Q21).

**Lincoln Community Survey Statements by Minority (1 of 4)**



Town residents regardless of race/ethnicity agree they are treated fairly and with respect by Town staff and are satisfied with quality of services and other Town amenities. However, the level of access for people of color compared to White residents clearly shows racial inequities regarding input on Town policies, budgets and cultural representation in Town events and activities.

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## Services and Programs Best Practices Gap Analysis

Evidenced-based Best Practices	Town Current Status
Conducts resident/community surveys periodically (e.g. bi-annually) to measure and monitor performance of services and programs	
Conducts disparity analysis to identify if inequities exist within access, quality and treatment for services and programs (e.g. race/ethnicity, gender)	
Disaggregate survey response data by demographic groups (e.g. race/ethnicity, gender)	

- Not started:** practice not present, inactive or currently undetermined
- Emerging:** discussions and considerations of the practice are awaiting approval decision
- Establishing:** practice partially in place or process for implementation has started
- Reinforcing:** practice currently present and active

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### Purchasing and Procurement

Purchasing and procurement is one of the largest areas of inequities (along with employment) that we typically observe within the public sector and local governments. Currently, there is no evidence the Town applies an IDEA mindset when seeking to purchase or procure supplies and services from businesses. Many Massachusetts Towns purchase goods and services from popular statewide contracts that are available on behalf of the negotiation efforts of the Operational Services Division (OSD), a state agency. Chapter 30B of the Massachusetts General Laws establishes uniform procedures for local governments to use when buying supplies, services, or real property. The Town of Lincoln’s annual spending (capital and contracts with 3rd party vendors) over a 10-year period is approximately \$1.5 million.

Currently, the Town does not collect or track the demographics of suppliers, vendors, and contractors. However, for any upcoming large capital spending projects, either for the Town or in collaboration with Schools, the Town should expand outreach to minority businesses and/or organizations that have relationships with firms owned by minorities. The Commonwealth of Massachusetts Supplier Diversity Office (SDO) defines “minority owned businesses” as a business owned by people of color, specifically businesses owned by people who identify as Asian, Black, Hispanic and Native American. The Town should immediately begin to monitor how much is being spent purchasing from statewide contracts, COMMBUYS, as well as within procurement (IFBs) and (RFPs), and any other platforms or mechanisms used to purchase and procure goods and services. The Town can determine the minority or non-minority status of vendors by using data available, survey current vendors, and as a last alternative, use publicly available data or information. After the Town has demographic data on vendors and contractors, it can conduct a disparity analysis to identify if any inequities exist.

**Potential benchmarks and aspirational goals (not quotas) for purchasing and procurement.**

The town is just beginning its IDEA journey and building the necessary infrastructure, as well as policies and practices. *A benchmark goal of 9 percent of purchasing and procurement spending with minority firms is a realistic goal that could be achieved in 3 years or less (benchmark based on SDO Annual Report 2022 utilization and availability for minority firms goals).* As the Town strengthens its capacity to advance IDEA with external organizations and diverse vendors and contractors, achieving a purchasing and procurement spending benchmark of 14.7 percent with minority firms, would demonstrate high commitment to IDEA, as well as parity or full utilization of available minority firms (*minority firms availability estimates, City Boston Disparity Study, 2020*).

Racial/Ethnic Group	Town Purchasing and Procurement Spend	Availability of Firms
Hispanic or Latino	-	4.4%
White, non-Hispanic or Latino	-	85.3%
Black or African American	-	6.8%
Asian American	-	3.2%
Native American	-	0.4%

## Purchasing and Procurement Best Practices Gap Analysis

Evidenced-based Best Practices	Town Current Status
Collects demographic data on all vendors, contractors and suppliers (e.g. race/ethnicity, gender)	<input type="radio"/>
Conducts disparity analysis to identify if inequities exist within purchasing and procurement (e.g. race/ethnicity, gender)	<input type="radio"/>
Targeted recruitment strategy to attract diverse vendors, contractors and suppliers (e.g. race/ethnicity, gender)	<input type="radio"/>
Reviews vendor and contractor qualification requirements and validates requirements are a valid business necessity	<input type="radio"/>
Requires diverse vendor pools before selection decisions	<input type="radio"/>
Requires diverse evaluation committee and all participants are trained on biases	<input type="radio"/>

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## Stakeholder Engagement (Board and Committee Representation)

Town board and committee members are an important component Town government and operations that shape the quality of life within the Town. These members provide input and help shape Town programs and services, the use of public Town funds or the care of public Town property. Each year The Town Clerk prepares a list of all vacancies and communicates any vacant appointed seat to the correct appointing board or committee. They also verify the term of service for the seat. Most vacancies occur at the end of an appointed term, but if a vacancy occurs in the middle of a term, the appointing board or committee is authorized to appoint someone to fill the seat for the duration of the term. Upon completion, the seat will become vacant again and open for reappointment. The appointing board or committee advertises any open seats through traditional advertising strategies (website, email lists, the Lincoln Squirrel, LincolnTalk listserv, etc.) Interested residents can apply using a standard volunteer application form. All applicants are interviewed, and all appointments are made in open session of the appointing board or committee. Otherwise, the appointing board or committee advertises any open seats through traditional advertising strategies.

As the table below shows from the Town's IDEA employee and board/committee member survey, of the 66 respondents who identified their race/ethnicity as board/committee members, 100 percent self-identified as White. There are total of 127 board and committee members who were invited to take the survey. People of color are significantly underrepresented as board and committee members, triggering racial inequity within this domain.

Racial/Ethnic Group	Town Board and Committee Representation (n=66)	Town Population Demographics Census
Hispanic or Latino	0%	12.7%
White, non-Hispanic or Latino	100%	74.2%
Black or African American	0%	1.0%
Asian American	0%	6.8%
2 or more races or some other race	0%	4.3%

## Stakeholders Engagement Best Practices Gap Analysis

Evidenced-based Best Practices	Town Current Status
Collects demographic data on all board, committee and volunteers (e.g. race/ethnicity, gender)	
Conducts disparity analysis to identify if inequities exist within representation of board, committee and volunteers (e.g. race/ethnicity, gender)	
Targeted recruitment strategy to attract diverse board, committee and volunteers (e.g. race/ethnicity, gender)	
Reviews board and committee qualification requirements and validates requirements are a valid business necessity	

-  **Not started:** practice not present, inactive or currently undetermined
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## Overall Findings and Recommendations

We understand the Town of Lincoln is just beginning the journey toward advancing Inclusion, Diversity, Equity and Anti-racism. This equity gap and barrier analysis provides the necessary initial benchmarks and baselines essential to cultivating a Town workplace that encourages and promotes equitable opportunity for everyone, regardless of race/ethnicity, gender, or sexual orientation. REG has shared best practices the Town should consider along this journey. In making those considerations, the Town should evaluate the need for allocating resources to develop new systems for collecting and managing data by demographic groups, as well as changes in internal policies or practices to help the Town close the **equity opportunity gap of 27.7 percent** for underrepresented employees.

### A. Establishing Aspirational Goals

After completing an equity gap and barrier analysis, one best practice is to establish overall quantitative goals for increasing representation of underrepresented groups and closing inequities. *Goals or targets are flexible and aspirational desired achievements with good faith efforts, not mandates.* Quotas are mandated goals, required to be achieved, and are illegal unless mandated by courts. If an organization/department fails to meet their IDEA aspirational goals, they assess why they failed to do so and adjust strategies to meet their goals for the desired time period.

The Town should consider following a two-step process to develop overall aspirational goals for the representation of underrepresented groups within employment, consisting of establishing a baseline figure and considering an adjustment to the baseline figure, if necessary, based on conditions in the local marketplace and other community factors. Below is an example of a two-step process for setting an overall aspirational goal for increasing representation of people of color and women based on the equity gap and barrier analysis results.

### Race/Ethnicity, Gender, and Sexual Orientation

Please note, due to data limitations, REG does not provide data on disparities or inequities related to sexual orientation. While research shows the greatest inequities in public and private sector organizations are racial and gender inequities, REG recommends making progress on race/ethnicity initially, as research shows closing racial inequities will also benefit other demographic groups due to changes in policies and practices, and awareness of biases.

#### 1. Identifying baselines and benchmarks

The availability analysis provides information that the Town can use for establishing a baseline figure for its overall aspirational goal. The analysis indicates that people of color are potentially available to participate in about 27.7 percent of the Town's overall employment opportunities, which the Town could consider as its baseline figure for its overall aspirational goal.

#### 2. Considering baseline adjustments

In establishing overall aspirational goals, organizations should also consider other relevant community factors (e.g., redlining, segregation, historical exclusionary policies) and make adjustments to their baseline figures as deemed appropriate. If an organization's goal is social justice, anti-racist, equitable and inclusive, then adjusting goals and benchmarks may include recognizing past racial segregation and intentionally exclusionary policies and practices within the Town's community that has shaped present conditions and outcomes, that without those past policies would have created different conditions and outcomes, and if adjustments to goals and benchmarks are not made, will impede the Town's ability to achieve its social justice, anti-racist, equitable and inclusive goals. For example, if a Town established its baseline employment figure for people of color based on the demographics of the recruitment area that has relatively no people of color (e.g. 1 percent) due to several surrounding communities having evidence of historical racial exclusionary housing policies, the Town should consider making an adjustment to increase its aspirational goal beyond the identified recruitment area to a

more diverse regional, state or validated benchmark to show good faith efforts in advancing IDEA. *REG does not see the need for the Town to make any adjustments to the recommended employment aspirational goal of 27.7 percent at this stage of the IDEA journey.*

### IDEA Best Practices Gap Analysis Results:

	Evidenced-based Best Practices	CURRENT STATUS
1	Dedicated position responsible for IDEA(e.g. diversity officer)	
2	Council or committee monitoring IDEA progress	
3	Collects demographic data on applicants, current employees, volunteers, vendors and contractors	
4	Disparity analysis conducted to identify if racial inequities exist within employment, service delivery/programs, purchasing and procurement, representation on boards/committees	
5	Senior leaders are engaged in IDEA goal setting (e.g. periodically reviews disparity data by department)	
6	Leadership performance and/or compensation (e.g. bonuses if applicable) tied to IDEA goals	
7	Written IDEA action plan(s) with validated benchmarks and targets	
8	IDEA goals, targets and metrics monitored periodically (e.g. quarterly)	
9	Ongoing IDEA training available for all employees and not mandatory	
10	Formal mentoring program available for all employees	
11	Internal and external stakeholder reports are shared to communicate progress on IDEA goals	
12	Conducts periodic employee engagement surveys to measure workplace climate, belonging and inclusion	
13	All survey (e.g. community, employee, supplier) response data is disaggregated by demographic groups (e.g. race/ethnicity, gender)	
14	Targeted recruitment strategy to attract a diverse job applicants (e.g. race/ethnicity, gender)	
15	Targeted recruitment strategy to attract a diverse suppliers, vendors and contractors (e.g. race/ethnicity, gender)	

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## Observations and Recommendations

In our final observations and analysis, REG recommends the Town consider the following actions (numbers in parentheses identify specific best practices):

- **Integrate best practices of IDEA into Town bylaws.** *This action will ensure sustainability of IDEA regardless of administration and leadership personnel changes.*
- **Establish Town-wide aspirational employment representation and procurement spending 3-year goals.** *The Town has an opportunity to attract and retain racially diversify talent (27.7 percent) based on availability. With a targeted recruitment strategy and managing potential vacancies, within three years the Town can make significant progress.*
- **Create a featured visible webpage on the Town’s website describing the Town’s commitment to advancing IDEA.** *This message of IDEA commitment should also be included on the Town’s employment/careers page on all job platforms, purchasing and procurement forms.*
- **Develop a process for periodically reviewing job descriptions and validating qualifications,** *Unnecessary qualifications and requirements can be barriers for attracting talent. The Town should not lower requirements, it must validate all criteria as a valid business necessity and consider if alternatives can satisfy its criteria (e.g. Master’s degree vs experience vs on the job training). Another example is considering if a Criminal Offender Record accurately predicts job performance and who will be a responsible, reliable, or safe employee).*
- **Standardized all job postings with additional language demonstrating Town’s commitment to IDEA** *Displaying the Town’s commitment to IDEA publicly is the first. Example language includes; the Town of Lincoln is committed to advancing Inclusion, Diversity, Equity, and Anti-racism, which includes equitable opportunity to be employed with the Town, equitable access to career development and promotional opportunities, equitable access to professional development opportunities, and equitable opportunity to provide goods and services to the Town as a vendor or contractor. We are an Equal Opportunity Employer, we strongly encourage people from underrepresented groups to apply).*
- **Explore and develop alternative approaches for making Town meetings more accessible and collecting input on Town budget, policies and practices from diverse groups.** *Based on the data obtained from the community survey, we identified opportunities to reduce significant racial inequities by providing opportunities for more racially diverse voices to be heard when discussing Town budget, policies and practices.*
- **The Town of Lincoln has a history of being intentionally exclusive** *10 years after the Town’s incorporation (e.g., warning out). While this was not unique to the Town, it should consider and define what intentionally “inclusive” looks like in terms of housing, zoning policies and practices that impede advancing IDEA (e.g. zoning, affordability)*
- **Develop a proposal that encourages involving local unions to support IDEA within union leadership and membership during the collective bargaining process.** *The Town should explore how to involve employer to advance IDEA. Unions have proven to be very effective in reducing racial inequities. The AFL-CIO has multiple resolutions supporting and encouraging IDEA. AFL-CIO resolution 19: Diverse and Inclusive Leadership for a Thriving Labor Movement encourages diversity of local union officers and executive boards. Union leaders should model inclusion in their own actions, personnel decisions, mentorship and succession planning and protect and create on ramps for pathways to leadership for women, people of color, and immigrants. AFL-CIO Resolution 3: Consider partnering with union leaders to host IDEA training to educate members about the ways race, ethnicity and other differences impact the lives of union members/employees and would-be members, and build common understandings of how racial bias and discrimination divide working people and undermine our collective power. Encourage AFL-CIO local bodies to build diversity in their own organizations. AFL-CIO Resolution 20 required the AFL-CIO to*

conduct a comprehensive review of diversity throughout its ranks. Encourage unions to publicly release and share their EEO-3 Reports, a federal mandatory biennial data collection report that requires local unions, specifically local referral unions, with 100 or more members to submit demographic data including membership, applicant, and referral information by race/ethnicity.

- **Identify opportunities to increase representation of racially diverse cultures within Town events, activities, and marketing and communications (e.g., website, brochures).** *This is another insight obtained from the community survey. The Town should explore how to support events and activities that represent the racial diversity of all its stakeholders (e.g. cultural events, holiday and cultural celebration activities, educational and speaking events)*
- **Consider a dedicated position responsible for IDEA (e.g. diversity officer) (1) (2).** *Having a dedicated position responsible for managing IDEA is one of the most effective evidenced-based components for advancing IDEA. The Town should explore potential budget opportunities for an IDEA officer who reports directly to the Town administrator. The Town should also strengthen the IDEA committee to ensure its effectiveness as an accountability structure and oversight of the Town’s IDEA progress in lieu of not having an IDEA officer.*
- **Collect demographic data for job applicants, current employees, volunteers, vendors and contractors (3).** *The Town should immediately survey all current employees to voluntarily self-identify their demographic status, and also communicate that if they choose not to self-identify, the Town will apply an EEOC recommended course of action and select their status for them. The Town should also survey existing vendors and contractors, board and committee members, and allow them to voluntarily self-identify their demographic status, as an alternative the Town can use publicly available information or observations to determine their demographic status.*
- **Conduct disparity analysis conducted to identify if racial inequities exist within employment, service delivery/programs, purchasing and procurement, representation on boards/committees (4).** *Once the Town has collected demographic data for employees, vendors and contractors, and board committee members, the Town can determine if significant disparities or inequities exist. If inequities are discovered in any area, the Town must identify what policies or practices may be unintentionally driving the inequities. The Town has currently identified the inequities in services and programs from the community survey.*
- **Senior leaders are engaged in IDEA goal setting (e.g. periodically reviews disparity data by department) (5).** *Town executives and departments leaders should be engaged when reviewing disparity and inequity data and identifying policies and practices that contribute to inequities. Departments leaders are expected to set goals and take ownership of the data to help the Town advance IDEA. Example goals may be underrepresentation of employment or procurement spending with minority businesses within certain departments (see additional goal examples in best practice (6)).*
- **Leadership performance and/or compensation (e.g. annual merit and step increases) tied to IDEA goals (6).** *What gets measured gets done. To prevent conflicting priorities from managers and leaders, IDEA goals should be included within management’s performance appraisal/evaluation process. Annual merit or step increases should also be tied to a successful performance review that includes IDEA goals. While IDEA goals will differ for various managers and leaders, below are example competencies and goals to be used to demonstrate developing actual goals and competencies;*
  - *a. makes substantial progress on implementing IDEA within the department;*
  - *b. implements portions of the IDEA Action Plan that have been prioritized to start in FY2024;*
  - *c. ensures that all strategic priorities, budgeting, purchasing, construction, repair, hiring, and other decisions involve considerations of IDEA in order to reduce any identified inequities within Town;*

- *d. educates Town departments and staff on how to apply an IDEA mindset within decision-making in order to advance IDEA and achieve inequity reduction goals;*
- *e. provides timely reports on the progress made towards meeting the 2024 IDEA Action plan goals.*
- *f. works closely with local institutions and business entities, including BECMA, SDO, to provide support and assistance to Town departments for promoting equity using chapter 30b and purchasing from statewide contracts*
- *g. facilitates review and revision of the zoning bylaws to promote diverse neighborhoods and affordable housing*
- *h. effectively supervises and manages the Town's workforce through recruiting, promoting, and retaining a highly qualified, diverse staff*
- *i. devises appropriate courses of action to achieve the policy goals of the IDEA committee*
- *j. applies creative and innovative thinking strategies for making Town meetings more accessible and collecting input on Town budget, policies and practices from diverse groups*
- **Written IDEA action plan(s) with validated benchmarks and targets (7).** *Once disparity and inequity data as well as policies and practices are reviewed, a written action plan must be developed. The action plan should include short and long-term goals that state how much will be achieved, and by when. Goals are not quotas, instead they are aspirational goals with good faith efforts. REG has created a recommended action plan and scorecard based on the findings in this report. The Town can further determine how to prioritize the recommendations based on current resource constraints.*
- **IDEA goals, targets and metrics monitored periodically (e.g. quarterly) (8).** *For every IDEA goal created, the Town should have metrics and indicators to allow tracking of progress. REG has provided metrics and indicators within the IDEA action plan and scorecard for the Town to consider.*
- **Ongoing IDEA training available for all employees and not mandatory (9).** *Foundational training on IDEA should be mandatory for all new employees and including within the orientation and onboarding process. Ongoing IDEA training should be made available in a variety of formats, but ongoing training should not be mandatory.*
- **Formal mentoring program available for all employees (10).** *Mentoring programs are effective for facilitating promotions of minorities and increasing representation within management. The Town may not need to immediately begin a mentoring program since the level of diverse representation is currently low. Instead the Town should focus resources on increasing overall diverse representation.*
- **Internal and external stakeholder reports are shared to communicate progress on IDEA goals (11).** *The Town should provide a summarized report included with the Town's annual report or strategic plan, that illustrates IDEA goals, action plans and current status of all goals and other achievements.*
- **Conducts periodic employee engagement surveys to measure workplace climate, belonging and inclusion (12) (13).** *The Town recently completed an IDEA audit assessment survey that measured IDEA as well as belonging and inclusion. The Town should continue surveying employees periodically every 12 to 18 months or as appropriate to allow the Town to demonstrate progress. The Town must ensure all survey response data is disaggregated by demographic groups, primarily race/ethnicity, gender and other protected classes.*
- **Targeted recruitment strategy to attract a diverse job applicants, vendors and contractors, board and committee members (14) (15).** *One of the most effective tools for advancing IDEA is the targeted recruitment of potential employees, vendors and contractors. The Town must explore strategies such as partnering with external organizations that represent diverse professionals and business owners. Developing a long-term relationship with these organizations will expand the Town's pool of talent and service providers.*

The Town of Lincoln has embarked on a courageous journey to ensure equitable opportunity for all stakeholders. With identified baselines, knowledge of best practices, and understanding the Town's current state of IDEA, the Town is positioned to begin building the essential infrastructure needed to successfully create a community that effectively promotes IDEA and uses data to measure, monitor and manage outcomes for all Town stakeholders.

Bird Guess



CEO and President  
Racial Equity Group

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2024 IDEA Strategic Priorities	Q1'24	Q2'24	Q3'24	Q4'24
<b>1. Attract and Retain Diverse Talent (Data and Disparities, Institutional, Knowledge and Competence)</b>	<p>Create a featured visible webpage on the Town’s website describing the Town’s commitment to advancing IDEA.</p> <p>Standardized all job postings, bids and purchasing forms with additional language on Town’s commitment to IDEA</p> <p>Establish Town-wide aspirational employment representation and procurement spending 3-year goals</p>	<p>Develop a process for periodically reviewing job descriptions and validating qualifications</p>	<p>Develop a targeted recruitment strategy to attract racially diverse talent, vendors and suppliers (14) (15)</p>	<p>Develop an IDEA overview to include within new employee orientation and onboarding</p>
<b>2. Strengthen Data and Disparities Commitment</b>	<p>Survey current employees, vendors and contractors, board and committee members to voluntarily self-identify demographic status (e.g. race/ethnicity) (3)</p>	<p>Conduct additional disparity analysis for remaining job groups to identify if racial and gender inequities exist within employment representation Town-wide by department(4).</p> <p>Conduct disparity analysis to identify if racial and gender inequities exist within purchasing and procurement (4)</p>	<p>Develop a process for collecting job applicant demographic data, evaluate job platforms that enable collecting of data digitally (e.g. Lever) or consider manually collecting data using a survey form</p>	<p>Develop a process for collecting new vendor and supplier demographic data, create forms to included in all purchasing and procurement packages, track data manually or digitally</p>
<b>3. Apply IDEA to Town-wide Priorities (Data and Disparities, Capacity Building)</b>	<p>Apply IDEA to Community Center planning, Housing Choice Zoning, and Climate Action Plan</p>	<p>Leadership performance and/or compensation (e.g. annual merit and step increases) tied to IDEA goals (6)</p>	<p>Explore and develop alternative approaches for making Town meetings more accessible and collecting input on Town budget, policies and practices from diverse groups</p>	<p>Consider and define what intentionally “inclusive” looks like in terms of housing, zoning and identify policies and practices that impede advancing IDEA (e.g. zoning, affordability)</p>

2024 IDEA Strategic Priorities	Q1'24	Q2'24	Q3'24	Q4'24
<b>4. Ensure IDEA Sustainability (Institutional)</b>	Integrate best practices of IDEA into Town bylaws.	Engage senior leaders in IDEA goal setting (5)	Evaluate the cost of dedicated position responsible for IDEA and consider proposing a new position. Continue supporting IDEA committee to ensure its effectiveness as an accountability structure and oversight of the Town's IDEA progress (1) (2)	Develop a standardized process for including IDEA goals to performance appraisals for all department leaders

2025 IDEA Strategic Priorities	Q1'25	Q2'25	Q3'25	Q4'25
<b>1. Attract and Retain Diverse Talent (Data and Disparities, Institutional, Knowledge and Competence)</b>	Develop an IDEA training curriculum available to all employees on biases and microaggressions and other relevant IDEA concepts (9)	Begin offering IDEA training available to all employees		Evaluate inequities within employment representation and consider developing a formal mentoring program if data shows inequities exist for promotions (10)
<b>2. Strengthen Data and Disparities Commitment</b>		Prepare to complete the 2025 EEO-4 report required for local governments		
<b>3. Apply IDEA to Town-wide Priorities (Data and Disparities)</b>	Develop a set of expectations for how all boards and committees recruit new members	Identify opportunities to increase representation of racially diverse cultures within Town events, activities, and marketing and communications		

2025 IDEA Strategic Priorities	Q1'25	Q2'25	Q3'25	Q4'25
<b>4. Ensure IDEA Sustainability (Institutional)</b>	Provide a summary to include within Town's annual report, Town meeting updates, that illustrate IDEA goals, action plans and current status of all goals (11) (7) (8)	Develop a tool that provides ALL boards and committees with an explicit approach to considering the equity and impact of current and future policies and bylaws	Prepare to conduct an IDEA audit assessment to measure progress and impact (12) (13)	Develop a proposal that encourages involving local unions to support IDEA within union leadership and membership during the collective bargaining process.

# 2024 IDEA Scorecard

Fostering economic, racial, ethnic, and age diversity among its citizenry through its educational, housing and other public policy.

#	Strategies	Objectives	Key Tactics	Goals	Timeline	Status	Key Metrics	Owner(s)	Comments
	<i>Broad qualitative statement defines desired direction and area of focus</i>	<i>Key action item that supports implementation of a strategic focus</i>	<i>Combination of specific actions to achieve goals</i>	<i>Quantifiable metrics clearly stating how much will be achieved</i>	<i>By when goal will be complete</i>	<i>Current level of progress for the goal</i>	<i>Quantitative (measurable) or qualitative (observable) data</i>	<i>Person or group responsible for ensuring goals completion</i>	<i>Enter any comments or other relevant information not captured elsewhere (e.g. resources required)</i>
1	<b>Attract and Retain Diverse Talent</b>	<p>Create a featured visible webpage on the Town’s website describing the Town’s commitment to advancing IDEA.</p> <p>Standardized all job postings, bids and purchasing forms with additional language on Town’s commitment to IDEA</p> <p>Establish Town-wide aspirational employment representation and procurement spending 3-year goals</p>	<p>Create an authentic and meaningful statement illustrating the Town’s deep commitment to IDEA</p> <p>Identify a strategic position to place the IDEA Commitment statement throughout the Town’s website, key webpages, purchasing and procurement and relevant forms</p> <p>Officially communicate Town-wide aspirational representation goal of 27%</p>	<p>Develop a single meaningful IDEA vision statement to attract diverse talent</p> <p>100% of job postings, bids, purchasing, procurement forms include IDEA vision</p> <p>Inform 100% of staff/volunteers of representation goal</p>	<p>Q1 2024</p> <p>Q1 2024</p> <p>Q1 2027</p>	<p>In progress</p> <p>Not started</p> <p>Awaiting approval</p>	<p>IDEA statement is has a visible and strategic presence</p> <p>Percent of job postings, bids, and relevant forms with IDEA vision</p> <p>Percent of staff and volunteers informed</p>	<p>Town Administration</p>	<p>Once data has been analyzed by department identify employment representation inequities by department and share data with department heads for goal setting</p>
2	<b>Strengthen Data and Disparities Commitment</b>	<p>Survey current employees, vendors and contractors, board and committee members to voluntarily self-identify demographic status (e.g. race/ethnicity) (3)</p>	<p>Review and approve the demographic collection best practices form provided by REG and schedule administration of the survey for each group</p>	<p>100% of employees, vendors and contractors and board members</p>	<p>Q1 2024</p>	<p>In progress</p>	<p>Percent of employees, vendors and contractors, and board members identified by race/ethnicity, gender</p>	<p>Town Administration</p>	<p>If participants choose not to self-identify, use employee records or publicly available information including direct observations as recommended by the EEOC</p>

# 2024 IDEA Scorecard (cont.) Fostering economic, racial, ethnic, and age diversity among its citizenry through its educational, housing and other public policy.

#	Strategies	Objectives	Key Tactics	Goals/Targets	Timeline	Status	Key Metrics	Owner(s)	Comments
	<i>Broad qualitative statement defines desired direction and area of focus</i>	<i>Key action item that supports implementation of a strategic focus</i>	<i>Combination of specific actions to achieve goals</i>	<i>Quantifiable metrics clearly stating how much will be achieved</i>	<i>By when goal will be complete</i>	<i>Current level of progress for the goal</i>	<i>Quantitative (measurable) or qualitative (observable) data</i>	<i>Person or group responsible for ensuring goals/targets completion</i>	<i>Enter any comments or other relevant information not captured elsewhere (e.g. resources required)</i>
3	<b>Apply IDEA to Town-wide Priorities</b>	Apply IDEA to Community Center planning, Housing Choice Zoning, and Climate Action Plan	<p>Identify and prioritize planning for applying IDEA to community center planning, housing choice zoning and climate action plan</p> <p>Build capacity by identifying potential partnerships with organizations that have a shared purpose for IDEA within the relevant areas. For example, estimated spending on \$25 million community center, the Town should contact the Back Economic Council Mass. State Supplier Diversity Office</p>	Evaluate top 3 strategic priorities using IDEA mindset	Q1 2024	In progress	<p>Number of ideas/opportunities identified on how IDEA can impact top 3 current priorities</p> <p>Number of potential inequities identified and prevented prior to final decision and planning</p>	<p>Town Administration</p> <p>Planning and Zoning Department</p>	
4	<b>Ensure IDEA Sustainability</b>	Engage senior leaders in IDEA goal setting (5)	<p>Provide department heads with employment representation and purchasing and procurement data for each department</p> <p>Identify any inequities for each department and aspirational goals to be achieved with good faith efforts (5)</p>	<p>100 percent of departments have employment and procurement representation data</p> <p>100 percent of departments with inequities established aspirational goals</p>	Q2 2024	Awaiting approval	<p>Percent of departments monitoring employment and procurement representation</p> <p>Percent of departments with inequities have aspirational goals</p>	Town Administration	

# 2025 IDEA Scorecard Fostering economic, racial, ethnic, and age diversity among its citizenry through its educational, housing and other public policy.

#	Strategies	Objectives	Key Tactics	Goals/Targets	Time line	Status	Key Metrics	Owner(s)	Comments
	<i>Broad qualitative statement defines desired direction and area of focus</i>	<i>Key action item that supports implementation of a strategic focus</i>	<i>Combination of specific actions to achieve goals</i>	<i>Quantifiable metrics clearly stating how much will be achieved</i>	<i>By when goal will be complete</i>	<i>Current level of progress for the goal</i>	<i>Quantitative (measurable) or qualitative (observable) data</i>	<i>Person or group responsible for ensuring goals/targets completion</i>	<i>Enter any comments or other relevant information not captured elsewhere (e.g. resources required)</i>
1	<b>Attract and Retain Diverse Talent</b>	Develop an IDEA training curriculum available to all employees on biases, systems thinking, and microaggressions and other relevant IDEA concepts (9)	Identify and evaluate potential training needed related IDEA and Town staff  Identify potential trainers and consultants with relevant, practical and engaging training curriculum	Conduct a total of four IDEA training sessions annually  up to 4 diverse trainers and facilitators	Q1 2025	Not started	Number of training sessions conducted  Number of trainers and consultants selected	Town Administration	
2	<b>Strengthen Data and Disparities Commitment</b>	Prepare to complete the 2025 EEO-4 report required for local governments	Identify the percentage of employees who have voluntary self-identified race/ethnicity and gender  Identify which employees have not self-identified and provide an additional opportunity using EEO demographic collection survey form	Identify 100 percent of employees (full and part-time) by race/ethnicity and gender	Q2 2025	Not started	Percent of employees self-identified race/ethnicity and gender  Percent of employees with unknown race/ethnicity and gender	Town Administration	If participants choose not to self-identify, use employee records or publicly available information including direct observations as recommended by the EEOC

# 2025 IDEA Scorecard (cont.)

Fostering economic, racial, ethnic, and age diversity among its citizenry through its educational, housing and other public policy.

#	Strategies	Objectives	Key Tactics	Goals/Targets	Timeline	Status	Key Metrics	Owner(s)	Comments
	<i>Broad qualitative statement defines desired direction and area of focus</i>	<i>Key action item that supports implementation of a strategic focus</i>	<i>Combination of specific actions to achieve goals</i>	<i>Quantifiable metrics clearly stating how much will be achieved</i>	<i>By when goal will be complete</i>	<i>Current level of progress for the goal</i>	<i>Quantitative (measurable) or qualitative (observable) data</i>	<i>Person or group responsible for ensuring goals/targets completion</i>	<i>Enter any comments or other relevant information not captured elsewhere (e.g. resources required)</i>
3	<b>Apply IDEA to Town-wide Priorities</b>	Identify opportunities to increase representation of racially diverse cultures within Town events, activities, and marketing and communications	Establish a diverse working group to explore ideas for increasing representation of different racial and cultural groups within Town events and activities  Outreach to diverse ages and student leadership groups	Increase representation of education/entertainment for 2 upcoming Town events	Q2 2025	Not started	Percent of racially and culturally diverse stakeholders attending events	Town Administration	
4	<b>Ensure IDEA Sustainability</b>	Develop proposal involving local unions to support IDEA within union leadership, membership during the collective bargaining process	Identify racial and gender inequities within employment, purchasing and procurement based on employment and supplier availability  Encourage unions to publicly release and share their EEO-3 Reports on representation by race/ethnicity, gender	Increase people of color union leadership to parity	Q4 2025	Awaiting approval	Percent union officers, executive board representation POC vs union membership	Town Administration	

## APPENDIX

### Definitions of Inclusion, Diversity, Equity and Anti-racism Terms

**Anti-racism:** the process of identifying and eliminating racism and racial inequities by changing organizational systems, structures, policies and practices

**Belonging:** the feeling of being accepted and supported by others

**Diversity:** characteristics that make one individual or group different from another.

**Disparity:** quantitative or qualitative differences between groups

**Equity:** reducing significant and/or persistent disparities resulting from structural advantage/disadvantage, discrimination, or biases, to levels of non-significance.

**Inclusion:** intentionally engaging and valuing diverse people by removing barriers to equal opportunity and including diverse people into key policy and decision-making processes.

**Inequity:** significant and/or persistent racial disparities resulting from structural advantage/disadvantage or biases.

### Description of EEO Job Group Categories

**Officials – Administrators:** Occupations in which employees set broad policies, exercise overall responsibility for execution of these policies, direct individual departments or special phases of the agency's operations, or provide specialized consultation on a regional, district or area basis. Includes: department heads, bureau chiefs, division chiefs, directors, deputy directors, controllers, wardens, superintendents, sheriffs, police and fire chiefs and inspectors, examiners (bank, hearing, motor vehicle, warehouse), inspectors (construction, building, safety, rent-and-housing, fire, license, dairy, livestock, transportation), assessors, tax appraisers and investigators, coroners, farm managers, and kindred workers.

**Professionals:** Occupations which require specialized and theoretical knowledge which is usually acquired through college training or through work experience and other training which provides comparable knowledge. Includes: personnel and labor relations workers, social workers, doctors, psychologists, registered nurses, economists, dietitians, lawyers, systems analysts, accountants, engineers, employment and vocational rehabilitation counselors, teachers or instructors, police and fire captains and lieutenants, librarians, management analysts, airplane pilots and navigators, surveyors and mapping scientists, and kindred workers.

**Technicians:** Occupations which require a combination of basic scientific or technical knowledge and manual skill which can be obtained through specialized post-secondary school education or through equivalent on-the-job training. Includes: computer programmers, drafters, survey and mapping technicians, licensed practical nurses, photographers, radio operators, technical illustrators, highway technicians, technicians (medical, dental, electronic, physical sciences), police and fire sergeants, inspectors (production or processing inspectors, testers, and weighers), and kindred workers.

**Protective Service:** Occupations in which workers are entrusted with public safety, security, and protection from destructive forces. Includes: police patrol officers, firefighters, guards, deputy sheriffs, bailiffs, correctional officers, detectives, marshals, harbor patrol officers, game and fish wardens, park rangers (except maintenance), and kindred workers.

**Paraprofessionals:** Occupations in which workers perform some of the duties of a professional or technician in a supportive role, which usually require less formal training and/or experience normally required for professional or technical status. Such positions may fall within an identified pattern of staff development and promotion under a New Careers concept. Included: research assistants, medical aides, child support workers, policy auxiliary welfare service aides, recreation assistants, homemaker aides, home health aides, library assistants and clerks, ambulance drivers and attendants, and kindred workers.

**Administrative Support:** Occupations in which workers are responsible for internal and external communication, recording and retrieval of data and/or information and other paperwork required in an office. Includes: bookkeepers, messengers, clerk-typists, stenographers, court transcribers, hearing reporters, statistical clerks, dispatchers, license distributors, payroll clerks, office machine and computer operators, telephone operators, legal assistants, sales workers, cashiers, toll collectors, and kindred workers.

**Skilled Craft:** Occupations in which workers perform jobs which require special manual skill and a thorough and comprehensive knowledge of the process involved in the work which is acquired through on-the-job training and experience or through apprenticeship or other formal training programs. Includes: mechanics and repairers, electricians, heavy equipment operators, stationary engineers, skilled machining occupations, carpenters, compositors and typesetters, power plant operators, water and sewage treatment plant operators, and kindred workers.

**Service – Maintenance:** Occupations in which workers perform duties which result in or contribute to the comfort, convenience, hygiene, or safety of the general public or which contribute to the upkeep and care of buildings, facilities, or grounds of public property. Workers in this group may operate machinery. Includes: chauffeurs, laundry and dry-cleaning operatives, truck drivers, bus drivers, garage laborers, custodial employees, gardeners, and groundskeepers, refuse collectors, construction laborers, park rangers (maintenance), farm workers (except managers), craft apprentices/trainees/helpers, and kindred workers.

### About the EEO Workforce Availability Dataset:

#### Why does the Census Bureau produce the EEO Tabulation 2014-2018 (5-year ACS data)?

The Census Bureau produces the EEO Tabulation 2014-2018 (5-year ACS data) for Federal agencies responsible for monitoring employment practices and enforcing civil rights laws in the workforce, and for all employers so they can measure their compliance with the laws. The EEO Tabulation 2014-2018 (5-year ACS data) serves as the primary external benchmark for conducting comparisons between the racial, ethnic, and sex composition of each employer's workforce to its available labor market.

The following four agencies sponsor this tabulation:

- Equal Employment Opportunity Commission (EEOC)
- Department of Justice's Employment Litigation Section of the Civil Rights Division (DOJ)
- Department of Labor's Office of Federal Contract Compliance Programs (DOL-OFCCP)
- Office of Personnel Management (OPM)

### **What is the American Community Survey (ACS) 2014-2018 5-year data file?**

The American Community Survey (ACS) produces period estimates of socioeconomic and housing characteristics. It is designed to provide estimates that describe characteristics of an area over a specific time period. In the case of ACS one-year estimates, the period is the calendar year. While a one-year estimate includes information collected continuously nearly every day from independent monthly samples over a 12-month period, a five-year estimate includes statistics collected over a 60-month period. Then we aggregate the results over the specified time period. For example, the 2014-2018 ACS five-year estimates describe the population and housing characteristics of an area for the period January 1, 2014, through December 31, 2018. They do not describe any specific day, month, or year within that time period. The cumulative sample of the ACS taken over a five-year time period allows measurement of detailed characteristics in local geographies and increases precision of its estimates.

