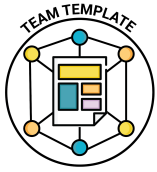


## TOOL #10



# Making Policies More Equitable

*This tool uses the PTR approach to help teams assess where bias may be impacting policies and practices, and create a plan to make them more equitable and inclusive.*

**APPLICATION:** In the next week, engage in the following activities with your team to assess potential points of bias, and create a plan to take action. Then complete the Tool Application Memo (TAM) to keep track of your team's progress.

## BACKGROUND

Trying to decide which policies and programs are biased can be a challenge. There are so many factors and not everyone is going to see things the same way. What someone might view as exclusive, others might view as appropriate for the context. What some view as an unwavering standard, others might view as an obsolete practice. In order to get clearer about where bias might be sneaking in, teams can use the PTR process.

PTR stands for Preference, Tradition or Requirement. It asks that teams look over policies and practices and take a pause to consider why the policy or practice exists. Is it because it is someone's preference and they like it better that way? Is it simply tradition, and people are doing it a certain way because that's how it's always been done. Or is it actually a requirement to be successful?

The value of this discussion is that it helps to disaggregate what we believe is appropriate behavior -which is where bias and conflict can often sneak in, versus a more objective lens that helps people get on the same page about what is able to be changed to include more people. Using this process means more productive conversations, and more ability to take action, without as much threat of being pulled off-task by heated emotions and disagreements.

## STEPS

**Step 1.** Identify potential policies or practices that could possibly favor some employees over others. Here are some examples that are typically open to bias you might consider:

- a. Hiring and promotion protocols
- b. Assignment of leadership roles
- c. Initiative rollout processes
- d. Gender descriptions in policy documents
- e. Performance metrics
- f. Staff meeting formats
- g. Budget allocations to various teams
- h. The way feedback is given
- i. Your idea here

Write the key takeaways from Step 1 here.

**Step 2. Identify the PTR Factors**

Work with your team to identify to what extent current practices were potentially formed by a Preference or Tradition, rather than a Requirement. Then work to identify what the Requirements ought to be to achieve success, outside of the influence of either Preference or Tradition.

Write the key takeaways from Step 2 here.

**Step 3.** Explore creative ideas to achieve the Requirement in a way that improves access for all employees

Write the key takeaways from Step 3 here.

**Step 4.** Action Planning

Work with your team to develop some action steps to transition towards the creative approach identified. We recommend using *Tool #18. Action Planning Template* (from this course) to help your team get to success.

Note, you may need to determine your sphere of influence prior to creating the plan. It's great to shift institutional policies, if feasible! But it might be easier to start with smaller actions that your team has more control over.

\*See the next page for a Sample PTR activity to provide more insights on how this process might work for your team.

## EXAMPLE PTR ACTIVITY

**Step #1:** Identify potential policies or practices that could possibly favor some employees over others.

We want to explore how technology initiatives are rolled out from our office.

When new technology initiatives are rolled out to improve operational processes (i.e. new budgeting software, meeting software, etc.) there is often a very tight timeline in which all staff are expected to make the shift. Younger people and those who are tech-savvy are typically able to adjust quickly, while those who might need more time - including several more senior staff, we've heard often feel a sense of dread and frustration because it takes longer to make the transition.

**Step #2:** Identify the PTR Factors

Preference: We want everyone to transition to using the new technology quickly, because old systems are obsolete and having people on different software platforms can create glitches in the system.

Tradition: We have a tradition of rolling out initiatives very fast because our office is always under time pressure, and we assume a lot of our staff is tech-savvy and can handle it.

Requirement: To get everyone on the same page using the software as quickly as possible.

**Step #3:** Explore Creative Ideas to get to requirement in a way that improves access for all employees

Maybe we can create timelines and beta-test new tech training programs targeting those who are the most nervous about technology. That will help us to ensure our training programs are effective and that we meet our goal of getting everyone onto the new software in a timeline that is more realistic for everyone. It also has the added benefit of improving trust and engagement with employees, which should lead to higher productivity and a smoother transition to the new technology.

**Step #4:** Action Steps

**Goal/Objective:**

Beta-test next technology shift with those who self-report to be slow to technology changes

**Action Plan:**

What are the Tasks?	Who Take Lead?	By when?	What will the Follow-Up look like?	Questions, Comments or Details
Set up meeting with training, data, DEIB, and tech teams.	Jonathan	May 8	Present outcomes and rec's from meeting at May 15 staff retreat	Focus on set up for a beta-test with target group. But there may be implications for training crew.
Tactfully recruit people who self-identify as struggling with tech	Marina	Sept 1	Michale will follow up in July to review plan	Let's work with DEIB to ensure this is done well.
Proactively identify a new tech platform to try out soon.	José and Angela	June 15	Taara will check-in	Taara may have some insights after meeting with Chief of Staff.
Reach out to Chief of staff to support buy-in/awareness of beta test	Taara	May 30	Michale will send reminder email next week as check-in.	Ask if he has any tech initiatives coming down the pike.