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KATIE JOHNSON:
Hi everyone, welcome. We will get started in just a moment. Thank you for being here.

Hi everyone. Welcome to the ED&I action plan implementation coaching workshop. We are so glad to help -- have you also thank you for joining. For we get started I will share some logistical details. We have captioning available if you need to ask is it. You can click the cc button at the bottom. We will share a reminder to please turn off your microphones when you are not speaking but when you do wish to speak, this is going to be an engaging workshop. We will spend most of our time in breakout rooms. We just ask that when you turn on your microphone, you begin by saying your name. This is helpful for participants to know who is speaking and for captioner. The meeting is going to be recorded except for our breakout rooms. You want to make sure the conversation can flow easily so we will not be recording the breakout rooms. But a recording of the main room session will be available along with a transcript from our captioner.

You can check that out on our event page a week or so after the event. We are also going to have notes, there will be a shared notetaking template that all of our breakout rooms will have and we will make sure that gets shared on the event page as well following the event. You all have it, here is a link to our event page for all -- where all this will be posted. Today is a coaching event so you will see some of our or all of our ED&I coaches and one (indiscernible) coach in each of our breakout rooms. You can learn more about our coaching initiatives and we will talk about it at the end of today's webinar by visiting our coaching page. I just wanted to drop that link so you have that.

To get us started, I was hoping to know a little bit about who is in the room. In the chat box or if you feel so welcome you are welcome to turn on your microphone and share out loud, can you share your name, title and center or program you are coming from? And tell us: what are you hoping to get out of today's session? Why are you here?

So great to see some friendly faces. Welcome (unknown name), welcome Tony. Thank you for introducing yourself and be sure to answer the question: what are you looking to get out of today's session?

Welcome Beth and Larissa and Patty. I see Laura is here. Thank you Laura, you say "hoping to learn more about how to provoke -- promote ED&I in my center and apartment." Sorry about your migraine. Inspiration and plan for the upcoming five-year plan. Hearing from others what they are doing, engaging in conversation. That is the plan today. We will spend very little time in the main room and most of it in the breakout discussions.

Holly is one of our coaches, connecting across the network. Welcome, welcome. Implementing the action plan, ideas for tracking progress in the next five years. Great. That is great to see. Dana, welcome.

I will let the chat keep going. I will keep scrolling just to catch up. Ideas around implementation. I am hopeful we can get there, we can get to a specific and practical suggestions and strategies

to move from planning to implantation. That is definitely one of our goals.

Great, so please continue to introduce yourself and what you are hoping to get out of the session. I will share a bit of an overview of how we got here. With many of you, you might remember a series of two webinars that Dan, one of our coaches here today helps facilitate. One was focused on embedding the ED&I action plan into the core function goals of our five-year plans. The second one was about reflecting equity, diversity and inclusion commitments into the core (indiscernible). So there is a big push to get to the ED&I action plan into our goals and into our plan for the next five years.

The hope for this session is to focus on what you do now. How do we actually implement those goals, those plans, that we put into our core grant applications to kind of see continued progress on implementation? We have had implementation groups met for the last year that were looking specifically at how to implement the plan. And we have had a coaching initiatives for coaches have shared implementation. We have noticed a few common buckets or themes that come out when we are talking about implementation. And we wanted to spend today's session with our coaches to dive into one of those three buckets that we were noticing.

In today's workshop, we are going to break out into breakout rooms. Focused on data collection and reporting to measure progress. So how can you use data to support implementation? And know that you are making an impact and creating change? The second breakout is on staff training and development to build capacity. So knowing that you need people power and personnel to have some training and skills and knowledge in order to implement the plan. So how do you actually go about doing that within a limited scope or resources? And the third breakout is on making and sustaining action of self-assessment data. Many network members start the process, rightfully so, by doing an organizational self-assessment. They might have really good data about where they are at and they might use that data to create goals. A lot of us put goals into the core grant applications.

But now what? You have this great data that you did, and you might have talked about it with leadership and have learned a few things but how do you actually make and sustain action from that self-assessment? We might even explore things like when to do another organizational assessment. What does that process look from start to finish? In each of these three breakout rooms, we are going to be looking at challenges that people have confronted and strategies that have worked to address those challenges. So focusing on strategies you have found successful.

We are hoping you can swap, you might have similar challenges so learning what has worked for other people really specifically so you can apply it in your own setting. You might have remembers selecting one of these three breakout rooms. You do not have to stick with the one you selected but we encourage you to join a little bit, we will join those in a little bit and we are hoping you are -- you will share an example from your own setting. And to model what that could look like and get a sense of this we have invited one coach from each of the rooms to share a little case study or example related to the breakout topic to give you a sense of what some of the conversation will be like in those breakout rooms.

So I will invite Ashley Salmon from Georgia center of leadership in disability to start with number one. Ashley?

ASHLEY SALMON:
Thank you, Katie. This is actually speaking. I am the diversity, equity and inclusion research associate at the Center for leadership and disability and I will be the data collection reporting to measure progress breakout room with Doctor Eduardo Ortiz.

Increasing equitable access to opportunities for marginalized communities. People with disabilities across raced along -- racial groups is part of the work many of us have committed to and as an advocate for equity, I have come to see that access is at the center of equity. I think equity is unachievable until it becomes a practical and measurable reality and this is across institutions, universities, and programmatic activities.

I've been an active member of the MCC for the past two years as well as an ED&I amp mentor this past year and in that short yet impactful time, we have exports of new possibilities to further the goal of equity. For example, we have imagined maximizing the utility of the national information report system is a data reporting tool that can serve the measurement tools of the UCEDD. During this time, increasing the quality of data collection through the network to improve program (indiscernible) requiredâ€¦ Has been of significant importance. Research has led me to exploring the topic of data health which describes how well an organization's data support its business objective and assessing this requires an understanding of data quality dimensions like how complete the data is, how accurate and consistent and accessible it is.

According to some data experts, each of these dimensions correspond to a challenge for any analytics group, any research group, any group in charge of reporting on this data, and if that data does not provide a clear and accurate picture of reality, it can lead to poor decisions, missed opportunities, increased cost or even compliance risk. Without access to complete, timely, accurate and consistent data, I believe you cannot measure equity across programs. So I look forward to a rich discussion and workshop in the data collection and reporting to measure progress breakout room with Doctor Ortiz where we can explore some barriers to data collection that you perceived or have encounter as well as strategies to overcome these barriers. So thank you and I will pass it on to the next breakout room.

KATIE JOHNSON:
Thank you so much, Ashley. The next breakout room is on staff training and development to build capacity. I will pass it to Jacqueline. Jacqueline, you are stillâ€¦

JACQUELINE HANKINS:
I am on mute, sorry. I am Jacqueline had,--Hankins, I am the DEI manager here and I am talking aboutâ€¦ Planning, trading, action. Where is your organization? After the death of George Floyd two years ago we held a town hall meeting to allow staff to vocalize their feelings and to find out what work could be done. Employees wanted to see more diversity, equity and inclusion either Institute. But we -- what does that look like in practice?

That was the biggest question. We quickly realized we had gaps in our hiring process, recruitment and retention needed to have a priority as well. And connecting with our communities of the patients and families we serve. We needed trust. We were motivated and wanted to hit the ground running. Things we did: established a DEI counsel, drafted a statement of our commitment, hosted book clubs, trainings, cultural presentations, workshops and made our brochures more diverse.

We realized another component that we need to focus on was belonging. We needed to create an environment in which different voices are heard, different skills and backgrounds are valued and promoted and everyone felt like they are -- can be their authentic selves without professional repercussions.

After all of this, we learned good intentions are not enough. We needed to do more to get the individuals that felt like they did not need this education to attend these activities. We needed to start at ground level, basics. We needed to start with implicit bias and letting people know what that is and intersectionality and identity.

Where to be go next? Join us in the breakout room to learn more. Thank you.

KATIE JOHNSON:
Thank you so much, I will pass it over to Jenean Castillo.

JENEAN CASTILLO:
Thank you, I am Jenean Castillo, I am in New York State, I am the lead program director and I received the DEI efforts.

The organizational assessment was a key starting point for us at WHD, the process started a few years ago, it was initiated in 2018 to 2019. After time -- at the time we approached this, we went with the cultural and organizational competence assessment, many of you are familiar of this that has been created by Georgetown University. Any of you may have used it. If you're familiar with that, you are certainly familiar with all the findings, results and data, information that the assessment provides.

So, just implementing that assessment process was its own process. Once we received the results, it was really thinking about how we begin to make sense of all this information. The staff at Georgetown were very supportive in providing supports around how we begin to review and organize all the findings, to begin to develop a plan that we can then implement.

In terms of approaching the development part of the plan, I turned to the ED&I action plan, I think everyone should be familiar with it at this point. I really used that as a way to look at what those in the organization that completed the survey was a saying about the work that was being done in EDI across the board and functions. I used it in a way to identify what the things we were already doing well, that we can continue to build on and also to use an example of the work that is already happening at W HD, what were the things we could easily begin to implement?

Including things we already thought were happening or should be happening that we can then initiate. Then using the process to identify some more short-term as well as long-term goals and objectives.

Of course along with that, once the planning is in place, it is thinking about how you implement and sustain it. I will say our plan became a very dynamic plan. A big part of that is that we all know what happened in 2020, right? The COVID pandemic just really shed an incredible spotlight on all the inequities happening, whether it was held, racial inequities, financial

inequities etc. so we need to make the necessary adjustments to ensure we are doing what we need to do to better address issues and concerns that are impacting the population we serve, the community we serve. As well as the impact it was having on staff and the organization itself.

In the breakout room, myself and Daniel Crimmins will be talking aboutâ€¦ I am looking forward to hearing from all of you about your assessments, as well as the challenges and successes around developing and sustaining your plan. Looking forward to that, thank you.

KATIE JOHNSON:
Thank you so much, Jenean, I appreciate it. From here, we are going to move into the breakout rooms. We have a moment, does anyone have any questions of the three or questions of the breakout rooms, feel free to add them to the chat. As we mentioned, we are going to focus on challenges and strategies in the breakout rooms. We have a shareable document for everyone where they can put in their notes to add a specific strategy or example challenges they confronted.

So you will see a little table. We ask you to fill it out with your thoughts because it will get shared. Any questions before we jump in?

While notes and overviews be shared after? Yes. Insurable document everyone will have access to and anyone can add to it. Laura asked about jumping between rooms, you are welcome to. We have more room in some rooms than others based on the registration. I am not sure who is in which room. If you see a room looking kind of empty, be free to jump in.

And Patty, with the focus primarily be around DER with -- DEI with interest centers, or my? In our first section we are focused on outward focusing initiatives, and the second one about letting our that's right reflecting our visions, that is inward. The plan has both outward and inward focus for the DEI plan. This will first focus on implementation challenges. So we are focusing on the lens of implementing the plan, if that is helpful.

Depending which room you are in, you can talk about data plans you are using in the data room. For example.

Great, it looks like our breakout rooms are already, they are self-selected, just go to the bottom of your Zoom screen. I think Anna set them up, so Anna can launch them. Just select the room you would like. All of our coaches will be in them. We will come back together at 3:45 PM. We can come back later.

(In breakout rooms)

KATIE JOHNSON:
Welcome back, everyone. I hope those were good conversations. I will restart our recording. I know our room had a great conversation. I hope the others did too. I think it is helpful to try to nail down specific strategies and I know our group got there so I am hopeful to hear other reflections from other groups on specific strategies as we continue to move forward as a network and share practices across with each other. So I hope there is enough time.

In the last few minutes, we are going to kind of bring back together and do some share outs, very briefly, I know some people are not fans of share outs which is why we have the notes so I encourage others to check out notes from the other rooms. I will invite each coach from the rooms to share a take away before we wrap up with some final announcements.

I will start with the data collection room. Eduardo?

EDUARDO ORTIZ:
First of all, it was a great conversation. We were in the middle of a sentence at the end. But I think this conversation needs to be continued because the big take away is data collection is very complex. There are issues related to the terminology for example that is involving all the time. Basic questions like gender identity, race and ethnicity, it seems like it is simple but it is not.

The examples are multiple. The strategies, big takeaways. We need to be creative. For example, if we are talking about socioeconomic status we cannot directly asked that question. It is a great idea to ask about the ZIP Code because that can give us some of that information without asking directly.

Or getting to the baseline of the very basic data to start like we need to ask (indiscernible) population. I think is a very basic piece that we can start otherwise it can become very complicated in the response -- and the response can be loose at the end. So thank you for this conversation. I learned a lot.

KATIE JOHNSON:
Thank you, Eduardo reflections. I will pass it to Holly from the staff training and development.

HOLLY MANASERI:
Thank you, Katie, we had such a fantastic conversation. And we really dug into so many strategies to the challenges and collaborated on what our final statement would be. So I am actually going to let Patricia go ahead and get that summary because she was, she really had all of the language that reflected what that diverse perspectives and wide range of our conversation was as it pertained to staff training. Patricia?

SPEAKER:
I think the ultimate conclusion we came up with was training. Training is necessary but not sufficient. And trying to do broad trainings and hoping that behavior changes is a big leap. And that really sort of using the training as an intro but then tailoring whatever the barrier is or the need is of individual staff or individual groups is where it is that.

Even though that may be more complex or take longer, it is what is going to be effective. So figuring out the strategies and really honing on the strategies to do more of that tailoring. Did I say it well?

KATIE JOHNSON:
So well. I am so glad. Thank you for sharing. I really appreciate it. That is a good take away. I encourage people to check out the notes to see some of the things that you all talked about. Thank you, Patty and Holly. Then I will pass it to our last room, focused on self assessment data

and building momentum and sustaining action. Dan?

DAN CRIMMINS:
Thank you, Katie. We had a small but mighty group, and as of everyone else our rich conversation. -- a rich conversation. One thing that got set is how important it is to be able to persist in keeping the vision of equity, diversity and inclusion. In reflecting on that, I think that maybe we have come to this as a topic in the last few years explicitly and as a way of saying "how do we operationalize it and incorporated into what we do?"

How do we go beyond that to make sure it is actually woven into everything we do forever? It is not the flavor of the day or it is not the flavor of the year or the decade, it really is, it has to become one of the defining characteristics I think of our centers is this commitment to social justice, to equity, diversity and inclusion as with all of the work we do. I think we are prepared to do that but then the two pieces that I think again were part of this is it will not happen without a commitment from leadership and it will not happen if it is one person's job.

It has to be essentially everybody's job to fulfill these goals and fulfill the mission and vision. So that is my take away and I apologize if my roommates (Laughs) Think I got it wrong but that is what I am saying and I'm sticking with it!

KATIE JOHNSON:
I was there, Dan, I think you did a great job and I am sure there are lots of things that were talked about in these rooms that we cannot possibly share and I share out but thank you to each of our coaches for sharing a glimmer from each of the rooms. As we are wrapping up our last few minutes, I really wanted to highlight our coaching initiative. One of the reasons we have this event is because we have such rich knowledge and experience from our coaches and we know the issues facing UC CDs can be specific to the context of the culture and nature of the leadership in organizations and size and so many different things that while these data trees -- while these strategies can be useful we want this one-on-one consultation. So I will share the coaching initiative and encourage you all to use this to launch off to connect with a coach that maybe you met today or consider how that might be helpful for your center.

I will share my screen quickly and show you our equity, diversity and inclusion hub which has a whole bunch of resources and includes our coaching page which has information about our coaching initiative. I shared the link to this page earlier and it includes the bios of each of the coaches you met today. I wanted to highlight the reason I am pulling up is to give you a sense of some of the things our coaches can do for you.

It is paid already, it is free to our network members. But our coaches can work one-on-one with you or in small groups, (indiscernible) how you might start implement in this plan, describes -- discuss action plans and they can also work to facilitate conversation with your team. They might meet one-on-one with you to plan for a meeting with your DEI workgroup or your CAC or executive members of your team. They can present on content related to the DEI plan and reflect on what you might be working on. So there is a breadth of things that our coaches can provide so feel free to reach out directly to me and I can help match you to coaches that might fit.

Because of our contract year, we have our funding refresh every year so we are hoping to finish

up this coaching, this year's version by the end of September so that would be a good time to reach out and get something scheduled while we have our coaches with us. I wanted to share that and I will drop the link again. Mostly I just wanted to thank each of our coaches and all of you for joining. I will drop our evaluations so you can take the next five minutes, finish up the evaluation, head on your way to wherever you are headed next.

Thank you, everyone, for your ongoing work. I know it is a lot of familiar faces, we are continuing to work on this in our network and it is important that we keep meeting and keep working to implement this plan. If our team at AUCD can be of any help to you or the coaches can, feel free to reach out to me.

That is all I have for now. Thank you so much. Please feel free to fill out our evaluation over the next few minutes. Thank you all.