Facilitation and Development of an Equity Plan for the Town of Hillsborough

Proposal by Central Pines Regional Council

About Us

Central Pines Regional Council, formally Triangle J Council of Governments, is a resource and support hub for local governments, community members, and partners across Chatham, Durham, Johnston, Lee, Moore, Orange, and Wake counties. Our work is rooted in the belief that our region thrives when we come together with a common vision and plan for the future. We advance this goal through the support of regional policy, collaboration, and technical assistance.

On any given day, CPRC works with our partners to provide support in the following areas:

- Aging & Human Services
- Community & Economic Development
- Environment & Resilience
- Housing
- Member Support & Strategy
- Mobility & Transportation

Our Approach to Facilitation and Planning Processes

Effective collaboration is the cornerstone of success for leaders and teams. CPRC's facilitation services are designed to empower boards and staff to overcome challenges, enhance problem-solving, and set clear goals. With a focus on transparency, curiosity, and compassion, we work alongside your team to design and tailor purposeful and engaged meetings that produce results. Our approach prioritizes team and trust-building, developing a shared understanding of the current state of the community, defining collective short-and long-term success, and prioritizing action items. Our team has assisted large, small, urban, and rural communities with the facilitation of critical conversations, annual retreats, and longer-term visioning processes.

Recent, relevant projects include:

- Town of Pittsboro Strategic Plan
- City of Durham Council Budget Retreat
- City of Raleigh Council Budget Retreat
- Holly Springs Town Council's Affordable Housing Retreat
- City of Sanford Board Retreat & Strategic Framework
- Town of Wilson's Mills Strategic Framework
- North Carolina State Climate Office's Strategic Framework
- Climate Pollution Reduction Grant Climate Action Plan

Scope of Work

Developing an equity plan involves a series of key steps that ensure the plan is comprehensive, actionable, and effective. CPRC will work with Town staff, Board Members, and the broader Hillsborough community to assess the current state of inequities, identify priority areas, and design a realistic plan to improve outcomes.

Objectives

- **Identify systemic barriers**: Assess existing policies, practices, and procedures to identify areas where racial inequities exist.

- **Engage organization and community stakeholders**: Involve diverse departmental representation and community voices, including underrepresented groups, to ensure the plan reflects the community's needs

- **Develop actionable strategies**: Create specific, measurable, attainable, relevant, and time-bound (SMART) goals and strategies to address identified inequities.

- **Monitor and evaluate progress**: Establish mechanisms to track the implementation and effectiveness of the Equity Plan.

Phase One (5-6 Months)

1. **Assess the Current State**:

    o **Data Collection:** Gather initial demographic data, employment statistics, housing, education, and health outcomes to identify disparities. ** *We strongly recommend this step and have included some options for reducing other costs in the cost proposal section if there is a need to reduce overall price.*

    o **Launch Internal Equity Action Team:** Establish and hold initial action team meeting with representation from Town departments to guide the plan's development and strategies. Ideally, this will include a broad representation of department types (internally such as human resources **and** external such as parks and recreation or public works). Intended to meet monthly throughout process.

    o **Stakeholder Mapping:** Identify key stakeholders, including community leaders, employees, advisory boards, advocacy groups, and residents from marginalized communities, not an exhaustive list.

    o **External Community Advisory Committee:** Establish an advisory committee of community leaders/local organizations and key public partners (e.g. Orange County) that will have a role or responsibility in implementing feedback from the community. Hold initial meeting and discuss the opportunity for the committee to serve as critical feedback step along the process, reviewing internal results and identifying communication/engagement gaps. Intended to meet monthly through end of process.

- **Internal Assessment:** Conduct an assessment of existing organizational policies and practices, including the Town's Strategic Plan and Comprehensive Sustainability Plan. Use the town's draft equity lens that was developed based on GARE's Racial Equity Toolkit, and local data to identify select policies or practices and conduct further evaluation of the impact on different racial groups. CPRC will provide guidance on which policies and procedures to pull and/or focus on to ensure a wide range of analysis and information.

- **Community Engagement:** Assist with the development of a Request for Proposals and selection of a local community partner or organization within the Hillsborough and/or Orange County's community for facilitation support. CPRC will work with the selected party and the Town's communication team to develop parameters for engagement that are aligned with the Town's areas of work and opportunities for impact, as well as communication to help participants understand the different topic areas that are of focus (e.g. the Town does not work on education).

  We recommend the request include some version of the following community engagement scope that will take place over 3-4 months.

  - Lead focus groups and listening sessions to gather input from diverse community members on equity concerns and priorities. Engagement methods will be designed based on the needs of the community and should be developed to address items outlined in Appendix A. Seek to understand the following:

    1. What conditions of well-being do we want for our community?

    2. Why do these conditions exist differently for people of color?

    3. What would these conditions look like if we achieved them?

    4. Who are the partners with a role to play?

- CPRC will also develop a community survey, provide (Spanish) written translation services to the Town's communication staff on engagement materials, and share a list of potential vendors for on-site translation assistance.

At the completion of phase 1, the following outcomes will have been accomplished:

- Identification of internal leads and key community stakeholders to serve on internal action team and external community advisory committee.
- Completion of robust community engagement process to capture needs from the community across several avenues.
- Summary of findings from data analysis and policy review, and community conditions/indicators that the plan should aim to impact.

Phase 2 (3 Months)

2. **Set Vision**:

   o **Vision Setting:** Hold session with Town Council to build a shared understanding and vision for the plan based on the results of Phase 1. Develop a vision statement that articulates Hillsborough's commitment to equity and aligns with existing vision and mission from the Strategic Plan.

3. **Develop Goals and Strategies**

   o **Planning Retreat(s) to Identify Goals and Strategies**: Facilitate a planning retreat(s) with staff to formulate strategies for achieving goals, including policy changes, new programs, and resource allocation. The structure and participation in the retreat(s) will depend on the results of Phase 1. Potential options could include a Department Head retreat only, or several retreats for departments that impact key community needs identified.

4. **Initial Plan Outline**

   o Draft a plan that outlines strategies, outcomes, and action steps for review and feedback by Internal Equity Action Team and staff leads.

   o Present refined draft to Town Council.

> **At the completion of phase 2, the following outcomes will have been accomplished:**
> - An understanding of how your organization's broader mission relates to your vision for equity, including what the elected body views as success.
> - Department-level buy-in and engagement on outcomes and actions that they feel can be achieved or improved in the organization.
> - Draft plan outlining goals, strategies, and action steps to address community indicators and desired outcomes, that has received feedback from internal stakeholders and Town Council.

Phase 3 (2 Months)

5. **Community Re-Engagement:** Work with Community Advisory Committee to plan and hold community feedback opportunities (1-2) on the draft plan to identify gaps and reaffirm priorities.

6. **Resource Allocation Planning**:

   o Establish metrics, performance indicators, and desired timeline to monitor progress towards the goals, aligning with existing strategic plan metrics and processes when possible. CPRC will provide recommendations of capacity needs and best practices that have been used in other communities locally/nationally with similar sizes and budgets.

   o Work with Human Resource staff to develop an additional training plan for organization and/or key plan leaders to address knowledge/skills gaps that have emerged in the process.

   o

7. **Review and Finalize Plan**:

- o Town Council Review and Approval

At the completion of phase 3, the following outcomes will have been accomplished:
- Community and board-affirmed plan that outlines vision, goals, strategies, action steps, metrics, and recommended resource needs for implementation.

Proposed Timeline

	Nov	Dec	Jan	Feb	Mar	Apr	May	June	July	Aug	Sep	Oct
Phase 1												
Community Data Collection	■											
Launch Internal Equity Action Team	■											
Stakeholder Mapping & Internal Assessment		■										
Request for Proposal		■	■									
Community Engagement			■	■	■	■						
Phase 2												
Town Council Vision Session							■					
Community Advisory Council Kick-off							■	■				
Department Goal-Setting Retreat								■				
Draft Plan Development								■	■			
Phase 3												
Community Engagement on Draft Plan										■	■	
Town Council Adoption											■	
Resource Allocation Planning											■	■

Project Team
Alana Keegan, Local Government Services Director

Alana Keegan is the Local Government Services Director at Central Pines Regional Council. With a strong commitment to regional collaboration, Alana plays a pivotal role in supporting local governments across the region. Her work focuses on fostering effective governance, enhancing public services, and driving strategic initiatives that benefit the communities served by the council. Alana's leadership is characterized by her dedication to innovation, efficiency, and building strong partnerships among local government entities. She brings experience in facilitation, strategic planning, and policy development. She holds a master's degree in

Communication from North Carolina State University and a Bachelor's degree in Economics and International Studies from Muhlenberg College.

Shuchi Gupta, Principal Planner

Shuchi Gupta is a Principal Planner in the Transportation focus area at Central Pines Regional Council. She has a background in Sustainability, and over the last few years has found herself deeply committed to equity and inclusivity work. She also works with the Environment and Resilience focus area at CPRC. Shuchi believes in a systems approach wherein for a local government to serve its communities the best involves all the departments and focus areas to collaborate with one another as well as the communities they serve. Shuchi is never hesitant in pushing the envelope to come up with innovative solutions. Shuchi has a master's in Liberal Arts in Sustainability and Environmental Management from Harvard Extension School, and another Masters in Chemistry from her home country- India.

Jenny Halsey, Assistant Executive Director

Jenny Halsey serves as the Assistant Executive Director of Central Pines Regional Council, overseeing all internal operations and long-term planning and providing strategic and facilitation services to local governments. She brings over 13 years of local and regional government experience in North Carolain. Jenny has extensive facilitation experience in the public and community space, leading strategic planning processes for nonprofit and public organizations in the Triangle, and partnering with CPRC's housing, resilience, and community planning teams to facilitate dialogue around complex or controversial topics. Jenny holds a master's degree in Public Administration from UNC Pembroke and a Bachelor's degree from UNC Greensboro.

Beth Davis, Member Engagement Coordinator

Beth Davis serves as the Member Engagement Coordinator at Central Pines Regional Council. In her role, she coordinates internal and external communications and helps to market CPRC services. Beth has over 16 years of experience with local government, with 4 years working at a regional council. With a passion for creativity and community engagement, Beth excels in fostering strong connections internally and externally. She holds a master's degree from NC State University in Youth & Family Development, and a Bachelor of Arts in Psychology.

Karyl Fuller, Principal Planner

With over two decades of experience in planning and GIS, Karyl currently serves as the Principal Planner and RPO Director at Central Pines Regional Council. Since June 2022, she has been leading the RPO, working closely with local partners to develop impactful projects, and providing training and technical guidance on data analysis and GIS. Prior to their current role, Karyl spent 14 years at the Foothills Regional Commission as Community and Economic Development Director and as a GIS Planner at Lamoille County Planning Commission. She holds a master's degree in Geographic Information Systems from Northwest Missouri State University.

Proposed Fee & Scoping Options

Based on the scope and timeline, the Council proposes to assist with this project for a fee of $34,000. This cost includes mileage and supplies. It does not include the following recommended costs: sub-contract with local facilitator for community engagement facilitation or stipends for community advisory committee members.

The Council highlights the following opportunities to reduce costs outlined below, based on Hillsborough's internal capacity and skillsets.

- *Facilitation Support for Department Retreat (day-of support only) - $3,000*
- *Sub-Consultant Support (internal management of RFP and selection) -$1,600*
- *Data Collection and Analysis -$3,500*

If the town would like to proceed with any of these additional services during the contract period, the Council will amend the contract at that time to include the service add on.

A maximum of three revisions to the draft plan is permissible.

Acceptance

The Council's staff will begin work as soon as we are notified of your acceptance. This confirms your intention to accept the scope of work as indicated in the proposal presented by the Council and otherwise meet the responsibilities outlined, and you are confirming the encumbrance of funds sufficient to pay the fees for services rendered.

Questions and acceptance of proposal can be sent to:

Jenny Halsey
Assistant Executive Director
jhalsey@centralpinesnc.gov

If the Town of Hillsborough would like to proceed with this proposal, please accept the proposal by signing below.

IN WITNESS WHEREOF, the parties hereto cause this agreement to be executed in their respective names.

_____*ATTEST*   _____

Signature

                                                   _____*Title*

                                                   _____*Date*

This instrument has been pre-audited in the manner required by the Local Government Budget and Fiscal Control Act.

                                                   _____
                                                    (Signature of Finance Director)

                                                   _____

Appendix A. Community Engagement Guide

Barriers to Effective and Equitable Community Engagement	Best Practices	Steps taken by Hillsborough to Overcome Barriers
Lack of trust or relationships with the community	• Partner with a local organization, CBO, nonprofit, faith institution or local leader to develop trust. • Invest prior time with the community partner listening to them about the community and their needs. Be genuine.	
Perception of being welcome at an event/meeting	• Don't be flashy or high handed • Make eye contact, smile and greet people as they arrive • Make people comfortable in settling down • Have your community partners present with you at the event • Have a kind attitude in how you carry yourself. • Be respectful	
Cultural context	• Talk about this with the community partner and learn about cultural norma and sensitivities. • Make adjustments as necessary in order to be respectful of these.	
Lack of public transportation	• Choose a location within the community • Choose a location which is near a transit line or in a short walkable distance from community • Give a stipend to cover transportation costs • Arrange private transportation such as vanpool/shuttle	
Lack of childcare	• Provide free onsite childcare • Hire someone at fare wages from within the community to provide onsite childcare • Give a stipend to cover childcare costs hired by any attendee on their own	
Limited English language skills	• Use plain, everyday language. • Hire an interpreter/translator preferably from within the community • Use the translator if the event speaker or facilitator cannot speak the language (e.g. Spanish) of the community.	

	• All event materials must be translated in community language	
Varying work schedules	• Discuss prior with the community partner what might be good days and times • Have multiple options – weekday/ weekend /morning/afternoon/evening	
Multiple jobs	• Have multiple options – weekday/ weekend /morning/afternoon/evening. • Provide food so that people can join directly after work without worrying to eat.	
Loss of income due to participation	• A fair and respectable amount as stipend to cover costs for loss of income, travel time, as well as for the inputs provided by the community as experts. Keep in mind the high consultancy costs you are able to avoid by getting direct input from the community. • The stipend must be in a form (cash/gift card to a retail store very close to the community such as Walmart, target or a grocery store) that is most attractive and easy to use for the community. • The stipend must be given right after the time of event and must not be sent later.	
Access to technology	• If the engagement effort involves use of technology (online survey/online training etc.), free access to appropriate technology (computers + internet connection) within the community itself must be ensured at times most suited to community needs.	

Technology savviness	• Use simple language, visuals, and icons to guide users through technology. Consider multilingual options. • Choose platforms and tools with intuitive, easy-to-navigate interfaces. Avoid overly complex systems that require extensive training. • Engage tech-savvy community members to act as trainers or "digital ambassadors" who can provide ongoing support. • Start with platforms or devices the community is already somewhat familiar with. For example, if many community members use smartphones, focus on mobile-friendly applications. • Use real-life scenarios that are relevant to the community when demonstrating how to use technology. This makes the learning process more relatable and meaningful. • Involve local leaders or trusted figures to encourage participation and help build trust in the technology.	
Close the loop	• Ensure to get back to the community with changes made in program based on engagement.	