

# Restoration from the Inside Out:

## A Diversity, Equity and Inclusion Strategy for the Chesapeake Bay Program

REVIEW DRAFT – January 2020



**Chesapeake Bay Program**

*Science. Restoration. Partnership.*

*Developed by Skeo Solutions  
for the Chesapeake Bay Program Diversity Workgroup  
of the Stewardship Goal Implementation Team*



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## Executive Summary

### Introduction and Purpose

The Chesapeake Bay Program (CBP) has retained Skeo to conduct a Diversity, Equity and Inclusion (DEI) Readiness Assessment and develop a DEI Strategy that helps the organization to:

1. Grow racial and ethnic diversity from 13% to 25% (including 15% of leadership).
2. Help partners to develop as DEI leaders who understand, respect and embrace cultural diversity.
3. Provide partners with the tools to continually assess progress towards diversity goals.

### DEI Readiness Assessment and Key Outcomes

Skeo began the strategic planning process with a DEI Readiness Assessment conducted between summer 2018 and summer 2019. To initiate the assessment, Skeo conducted interviews with CBP workgroups, goal teams and leadership to inform an assessment framework based on the day-to-day operations, structural processes, organization culture and other considerations related to DEI. Next, Skeo and the CBP project team used the framework to conduct a DEI Readiness Assessment that included additional interviews, a DEI readiness survey, two focus groups, and review of key CBP documents to evaluate key policies and procedures.

The Readiness Assessment framework is organized around the following focus areas and objectives:

Focus Areas	Objective
Authorizing Environment	1. Create an authorizing environment for DEI.
Internal DEI	2. Increase DEI in hiring, promotion and tenure. 3. Increase DEI in appointee and volunteer bodies. 4. Increase DEI in internal culture and training.
Mission-Related Work	5. Advance DEI through GIT workplans and outcomes. 6. Advance DEI through communications. 7. Advance DEI through grant-making and contracting.
Thought Leadership and Partnerships	8. Increase DEI performance of partners.

The CBP Readiness Assessment scores, found in Chapter 2, set a baseline for some ambitious goals. The integrated assessment indicates that while CBP has established a strong foundation, there is much work yet to do to advance DEI within CBP. Many actions have not been started or are not yet meeting objectives. However, the recent adoption of the diversity goal in the Chesapeake Bay Watershed Agreement, along with the readiness of the staff, demonstrate that the organization is poised to make great strides in advancing DEI. CBP now has a baseline and framework that can be used to prioritize and track both near- and long-term actions to improve DEI across the eight objectives over time.

### DEI Strategy

Based on the outcomes of the DEI Readiness Assessment Findings and Recommendations, the project team identified a series of recommendations to help CBP build on its strengths and further advance diversity, equity, inclusion and environmental justice (EJ). The DEI Strategy includes recommendations that are grouped into the four DEI Framework focus areas. These are summarized below; more detailed recommendations can be found in Chapter 4.

#### 1. *Strengthen CBP's Authorizing Environment*

1. **Adopt a clear and succinct DEI statement** that fully captures definitions for DEI and EJ and how each of these topics relates to and advances the mission of CBP.

2. **Update the CBP Management Strategies, as needed, to explicitly articulate the roles of diversity, equity, inclusion and environmental justice** in achieving CBP’s mission and guiding implementation of the agreement.
3. **Clarify language in authorizing and governance documents to reflect a priority on developing long-term relationships with organizations run by and primarily serving communities of color and other underrepresented communities** (in addition to, and distinct from organizations that engage communities of color and other underrepresented communities but are not led by representatives of these communities.) This includes the Governance and Management Framework as well as the Management Strategy documents.
4. **Update the Governance and Management Framework for the Chesapeake Bay Partnership to include** a) explicit diversity goals for each group in their “Leadership and Membership” sections, b) language describing the role and impact of DEI and EJ considerations in the “Process for Decision-Making” section, and c) mechanisms for raising and addressing partnership-related DEI issues.
5. **Biennially, incorporate changes related to the DEI Strategy annual action priorities** throughout both the Diversity Outcome Management Strategy and the DWG Outcome Logic Table and Workplan.
6. **In addition to diversity and environmental justice, explicitly articulate equity and inclusion in the next iteration of the Chesapeake Bay Watershed Agreement.**

## 2. *Advance DEI Internally*

1. **Increase diversity and inclusion** for staff, appointees, and volunteer bodies.
2. **Build a common understanding** of and expanded capacity for DEI.
3. **Institutionalize efforts to advance** DEI internally.

## 3. *Advance DEI through Mission-Related Work*

1. **Clarify the distinction** between (1) organizations that are run by and primarily serve communities of color and other underrepresented communities and (2) other organizations that engage these communities.
2. **Build relationships with communities of color, low income communities and other underrepresented groups**, and incorporate these leaders into decision-making and implementation.
3. **Advance** diversity, equity and inclusion **through GIT workplan development and implementation.**
4. **Advance** diversity, equity and inclusion **through grantmaking.**
5. Review and **strengthen diversity, equity and inclusion** in watershed restoration outreach, materials, activities, and events.

## 4. *Advance DEI Performance of Partners*

1. **Increase access to DEI training and capacity building.** Prominently advertise, incentivize and recruit for the 2019-2020 trainings and distribute tools developed under this grant to CBP Partners. Request feedback on the training and tools and additional trainings and tools could be valuable for them and for their colleagues. Encourage partner organizations to offer DEI trainings to their board, staff and volunteers.
2. Share the CBP’s DEI statement or policy with CPB partners once it is developed. Consider offering a webinar or pursuing other opportunities for discussion and dissemination of both the CBP DEI statement and the lessons learned in developing and adopting the statement. (For example, the annual Chesapeake Bay Watershed Forum may be a good venue to share the CBP DEI statement and goals with a broader watershed-wide audience, as well as the annual Choose Clean Water Coalition conference.)
3. **Build off the dissemination of the DEI statement** by offering a follow up webinar for CBP Partners that takes a deeper dive into DEI plans, tracking and assessment.
4. **Develop and distribute straightforward, accessible guidance** on including DEI and EJ criteria in grant targets and evaluation to CBP Partners.

5. **Develop and share the DEI communication and distribution guidance** broadly among CBP Partners.
6. **Develop tracking and reporting guidance to share** broadly among CBP Partners. Where feasible, point CBP Partners to tools that are already established in the field. Develop a biennial report to capture CBP Partner tracking outcomes to help build momentum and accountability across the partnership – this report could start by tracking diversity of board, management and staff, and then add additional measures as CBP roles out best practices, tools and resources to its partners.

## Action Plans

Action plans to implement the DEI Strategy have been developed for each of the four framework focus areas. Each action plan outlines a set of tasks each with a lead and expected timeframe. The plans also include descriptions of potential tools and resources needed.

While the action plans address all of the recommendations from the DEI Strategy, the team has identified some priority focus areas where CBP can make the biggest difference in advancing DEI and EJ to help guide near-term implementation efforts. The action plan charts are intended to be a living workplan and these priority focus areas should be updated on an annual basis to build momentum for implementation.

The following principles can help guide successful implementation:

- *Restoration happens from the inside out* – Put in place the organizational infrastructure and foster the cultural shifts needed to support successful implementation over the long-term.
- *Accountability is key to success* - Include a review, reporting and update cycle in the action plan document. While individual staff or board members may be responsible for specific pieces of the DEI Action Plan, the Diversity Workgroup (DWG) can retain a central role in the review, reporting and update cycle for this document, reviewing outcomes on an annual or biennial basis (depending on the outcome) and refining the action plan based on feedback and lessons learned.
- *Measure both implementation actions and their impacts* – The action plans identify specific measures to examine impacts through quantifiable change, but some actions make take time to achieve a quantifiable change. Therefore, documenting and evaluating the implementation actions for each action can also provide valuable information.

## Looking Ahead

This report provides a DEI Strategy for the Chesapeake Bay Program that will help staff, volunteers, decision-makers and partners leverage strategies for diversity, equity and inclusion as well as environmental justice. The work of implementing the Chesapeake Bay Watershed Agreement to restore the Bay is an ambitious and visionary undertaking. Success over the long-term will require tapping into the persistence, wisdom, creativity, motivations and political will of the full diversity of people who live in and contribute to the many ecosystems that make up the Chesapeake Bay Watershed. Like the Chesapeake Bay itself, successful DEI and EJ efforts require a healthy ecosystem in order to thrive. This DEI Strategy emphasizes the internal, cultural and policy changes needed to create a healthy, supportive organizational ecosystem where DEI and EJ goals can produce lasting results that advance the restoration of the Chesapeake Bay Watershed.

If done well, these strategies will strengthen CBP's ability to achieve its mission and carry out its responsibilities effectively over the long-term. By embracing restoration from the inside out, CBP will be able to more effectively build a diverse and inclusive coalition to implement the Chesapeake Bay Watershed Agreement and restoring the bay, its tributaries and the surrounding ecosystems.

## Chapter 1: Introduction

### Purpose and Background

The Chesapeake Bay Program (CBP) has retained Skeo to complete a Diversity, Equity and Inclusion (DEI) Readiness Assessment and develop a DEI Strategy that helps the organization to:

4. Grow racial and ethnic diversity from 13% to 25% (including 15% of leadership),
5. Help partners to develop as DEI leaders who understand, respect and embrace cultural diversity, and
6. Provide partners with the tools to continually assess progress towards diversity goals.

CBP's DEI Strategy seeks to build upon the work of other national DEI leaders in the watershed, environmental and foundation fields. Two resources that have been particularly influential in structuring the assessment and recommendations include:

1. The *State of Diversity in Environmental Organizations* report released by Green 2.0 (2014) which addresses the state of diversity in the environmental sector (NGO's, government, philanthropy) at the national scale. See the textbox below for a summary of the key findings of this report.
2. The *Diversity, Equity and Inclusion Audit Scorecard* developed by Skeo in collaboration with the Chesapeake Bay Trust (2018), which influenced the DEI Readiness Assessment scorecard developed for this assessment.<sup>1</sup>

#### The State of Diversity in Environmental Organizations (2014)

In 2014, the Green 2.0 Initiative conducted an assessment of diversity in the environmental sector at the national scale. The groundbreaking and comprehensive report "The State of Diversity in Environmental Organizations: Mainstream NGOs, Foundations & Government Agencies" establishes three main factors that prop up an "overwhelmingly white 'Green Insiders' Club" within the environmental field:

*"1. The Green Ceiling.* Despite increasing racial diversity in the United States, the racial composition in environmental organizations and agencies has not broken the 12% to 16% "green ceiling" that has been in place for decades.

*2. Unconscious Bias, Discrimination, and Insular Recruiting.* Confidential interviews with environmental professionals and survey data highlight alienation and "unconscious bias" as factors hampering recruitment and retention of talented people of color.

*3. Lackluster Effort and Disinterest in Addressing Diversity.* Efforts to attract and retain talented people of color have been lackluster across the environmental movement."

The report also identifies six factors that make diversity initiatives successful: "(1) Adequate and stable funding, (2) Adequate and committed leadership, (3) Adequate organizational buy-in, (4) Ability to communicate across race, class, gender, and cultural lines, (5) Institutionalizing diversity, equity, inclusion goals, and (6) Translate diversity training into action."

Source: Taylor, Dorceta. 2014. [Green 2.0 Highlights Handout](#). Pages 1 & 4. Accessed 15 February 2019.

Subsequently released reports that may also be of interest to the CBP audience include: [Diversity Derailed: Limited Demand, Effort and Results in Environmental C-Suite Searches](#) (Beasley, 2016); [Beyond Diversity: A Roadmap to Building an Inclusive Organization](#) (Beasley, 2017); and [Leaking Talent: How People of Color are Pushed Out of Environmental Organizations](#) (Johnson, 2019).

<sup>1</sup> The original scorecard was developed as a template to help environmental funders advance DEI in their work, and can be found in [Appendix 6](#) of the [DEIJ in Action](#) report prepared for the Chesapeake Bay Watershed Community (2019).

## Developing Shared Understanding: Important Terms

For the purposes of the assessment process, the project team defined key terms so that assessment participants could understand that each term in “DEI” has a unique meaning and different implications for action. The definitions below were adapted from or developed by the D5 Coalition:<sup>2</sup>

- **Diversity:** The demographic mix of a specific collection of people, taking into account elements of human difference. For example: racial and ethnic groups, income, spectrum of built environment settings (rural to urban), faith communities, LGBTQ+ populations, people with disabilities, gender, relationship to the natural environment.
- **Equity:** Improving equity is to promote justice, impartiality and fairness within the procedures, processes, and distribution of resources by institutions or systems. Tackling equity issues requires an understanding of the underlying or root causes of disparities within our society.
- **Inclusion:** Refers to the degree to which diverse individuals are able to participate fully in the decision-making processes within an organization or group. While a truly “inclusive” group is necessarily diverse, a “diverse” group may or may not be “inclusive.”

## Acting Together for Change: Why “Restoration from the Inside Out”?

The work of implementing the Chesapeake Bay Watershed Agreement and restoring the bay is an ambitious and visionary undertaking. Success over the long-term will require tapping into the persistence, wisdom, creativity, motivations and political will of the full range of diverse communities who live and work in the Chesapeake Bay Watershed.

Like the Chesapeake Bay itself, successful DEI and EJ efforts require a certain ecosystem in order to thrive. While early conversations about watershed health may have focused on visible changes in the Chesapeake Bay and aquatic life, addressing these visible, as well as harder to perceive needs will require changes within the full ecosystem, including the contributing uplands throughout the watershed.

Similarly, organizations interested in prioritizing into DEI and EJ may begin with conversations about increasing diversity of staff and partnerships or reaching and engaging people from diverse communities. However, achieving and sustaining these goals will depend on first examining the organizational ecosystem – the interrelated policies, values and culture that influence why and how work is accomplished. The work of developing a more inclusive and equitable institution requires administrative changes to policies and metrics, building common understanding of DEI and EJ’s centrality to the mission of the organization, and increasing the inclusion and sense of belonging within the organization for new members and partners that the organization seeks. Restoration happens from the inside out.

CBP is positioned at this important juncture. CBP has laid significant groundwork, including the development of a diversity outcome and environmental justice principle for the Chesapeake Bay Watershed Agreement. This document, *A Diversity, Equity and Inclusion Strategy for the Chesapeake Bay Program*, provides a roadmap to navigate the internal, structural changes needed to create a supportive organizational ecosystem where CBP’s DEI and EJ goals can thrive and produce lasting results that advance the restoration of the Chesapeake Bay Watershed.

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<sup>2</sup> Diversity, Equity and Inclusion. D5 Coalition. 2014. Retrieved from: <https://www.d5coalition.org/about/dei/>.



## Chapter 2: DEI Readiness Assessment Process and Outcomes

Skeo began the strategic planning process with a DEI Readiness Assessment conducted between summer 2018 and summer 2019. This chapter summarizes the assessment process, the DEI assessment framework, the evaluation methodology, key themes and assessment scores. The full DEI Readiness Assessment Findings and Recommendations is included in Appendix C.

### Assessment Process

To initiate the assessment process, Skeo conducted a series of interviews with CBP workgroups, goal teams and leadership to better understand day-to-day operations, structural processes, organizational culture and other considerations related to DEI. Next, Skeo and the CBP project team conducted a DEI Readiness Assessment that included additional interviews, a DEI readiness survey, two focus groups, and evaluation of key policies, processes and procedures based on review of key CBP documents. These assessment activities and their outcomes are summarized in Table 1 on the following page.

In March of 2019, Skeo presented the DEI project workplan and early findings of the interviews to the Chesapeake Bay Program Biennial Strategic Review Systems meeting in Richmond, VA. Then during the May meeting of the CBP Diversity Working Group, Skeo presented the DEI project goals, components, and early findings to the workgroup members and solicited their input, comments and suggestions.

Table 1. DEI Readiness Assessment Process and Outcomes Summary

Subtask Approach	Subtask Outcomes
<b>1. Interviews</b>	
DEI interview questions focused on understanding cultural readiness and attitudes towards DEI at multiple levels within the organization.	<p>Conducted interviews with over 65 participants from the:</p> <ol style="list-style-type: none"> <li>1. Citizens' Advisory Council (July 13, 2018)</li> <li>2. Goal Implementation Team Coordinators and Staffers (July 19, 2018)</li> <li>3. Scientific and Technical Advisory Committee (August 13, 2018)</li> <li>4. Goal Implementation Team Chairs (September 6, 2018)</li> <li>5. Management Board (October 18, 2018)</li> <li>6. Diversity Workgroup (November 13, 2018)</li> </ol>
<b>2. Readiness Assessment Survey (Appendix A)</b>	
Eleven question survey designed to identify beliefs about DEI and key perceived challenges to advancing DEI in CBP's internal culture and partnerships.	<p>Distributed an electronic survey to CBP staff that was open for two weeks in February 2019. The survey received 60 responses.</p> <p>The DEI Survey questions and a survey results summary are provided in Appendix A.</p>
<b>3. Focus Groups (Appendix B)</b>	
Facilitate two in person focus groups to dig deeper into CBP's internal culture around DEI and incorporating DEI into decision-making at CBP	<p>Facilitated two in person focus groups on March 5, 2019 to explore: CBP's Internal Culture around DEI (9 program staff participants):</p> <ul style="list-style-type: none"> <li>• Gathered staff perceptions of the internal DEI culture at CBP.</li> <li>• Identified how staff think CBP could continue to grow and strengthen its practice of DEI.</li> </ul> <p>Incorporating DEI into Decision-making at CBP (7 staff, management board and GIT member participants)</p> <ul style="list-style-type: none"> <li>• Explored CBP's understanding of diversity vs. equity vs. inclusion.</li> <li>• Gathered ideas and considerations for integrating DEI into decision-making and thought leadership in a science-based organization.</li> </ul> <p>Both focus group agendas are provided in Appendix B.</p>
<b>4. Evaluation of key policies and procedures</b>	
Evaluated four documents provided by CBP using the DEI Strategy Framework to supplement information gathered from staff.	<p>Reviewed the following documents:</p> <ol style="list-style-type: none"> <li>1. Diversity Outcome Management Strategy (2015-2025)</li> <li>2. Diversity Workgroup (DWG) Outcome Logic Table and Work Plan (2018-2019)</li> <li>3. Governance and Management Framework for the Chesapeake Bay Program Partnership (September 13, 2018)</li> <li>4. Chesapeake Progress report– Diversity (April 30, 2019)</li> </ol>

## DEI Assessment Framework

The DEI Assessment Framework presented in this section includes eight objectives across four focus areas (summarized in the table below), along with 35 specific actions (outlined in the following pages) that can be used to evaluate the status of DEI within CBP.<sup>3</sup>

*Table 2. Objectives in the DEI Assessment Framework*

Focus Areas	Objective
Authorizing Environment	1. Create an authorizing environment for DEI.
Internal DEI	2. Increase DEI in hiring, promotion and tenure. 3. Increase DEI in appointee and volunteer bodies. 4. Increase DEI in internal culture and training.
Mission-Related Work	5. Advance DEI through GIT workplans and outcomes. 6. Advance DEI through communications. 7. Advance DEI through grant-making and contracting.
Thought Leadership and Partnerships	8. Increase DEI performance of partners.

### *Note on the Term “Other Underrepresented Groups”*

The groups that an organization prioritizes for expanding representation may be dependent on any number of factors relevant to organizational context and may also shift and change over time as a field evolves. The term “other underrepresented groups” is used throughout the framework to give the actions on the framework relevance as CBP’s representation priorities evolve.

## DEI Assessment Framework

### *1. Create and Authorizing Environment.*

1. Include specific DEI and environmental justice (EJ) goals in the Chesapeake Bay Watershed Agreement.
2. Adopt and disseminate a clear DEI statement or policy.
3. Adopt an organizational DEI Plan.
4. Track, analyze and report on the measures of the DEI plan.
5. Include DEI measures in the performance goals for senior and mid-level managers.
6. Create a Management Board-level Diversity or DEI Committee or equivalent.

### *2. Increase DEI in Hiring, Promotion and Tenure within CBPO Staff.<sup>4</sup>*

1. Encourage partner entities to promote DEI in hiring, promotion and tenure policies, practices and procedures consistent with fair hiring practices.
2. Encourage partner entities to include people of color and other underrepresented groups in hiring and promotion committees.

<sup>3</sup> The focus areas in this framework were developed by Skeo based on best practices research on DEI evaluation in the environmental and philanthropic fields and refined while developing a model framework for the Chesapeake Bay Trust. The framework objectives and actions were informed by the information gathering interviews conducted by Skeo.

<sup>4</sup> CBPO Staff include all employees who work at the CBP offices in Annapolis, Maryland, and serve in a variety of roles and capacities to advance and coordinate the work of the larger partnership. They include employees of federal agencies and contractors, non-profit organizations and academic institutions. Specific federal agencies include: the Environmental Protection Agency, National Parks System, Forest Service, Geological Survey and National Oceanic and Atmospheric Administration. See <https://www.chesapeakebay.net/who/staff>.

3. Encourage partner entities to conduct proactive outreach and recruitment to increase representation of people of color and other underrepresented groups in management, CBP staff and intern positions.
  4. Encourage partner entities to seek opportunities to provide professional development, promote and retain people of color and other underrepresented groups across management, CBP staff and intern positions.
3. *Increase DEI in Appointee and Volunteer Bodies.*
1. Conduct proactive outreach and recruitment to increase representation of people of color and other underrepresented groups on the Management Board, Advisory Committees, Goal Implementation Teams and Workgroups.
  2. Seek opportunities to support and retain people of color and other underrepresented groups on the Management Board, Advisory Committees, Goal Implementation Teams and Workgroups.
4. *Increase DEI in Internal Culture and Training.*
1. Provide CBP staff and Management Board training and tools on DEI, racial equity and environmental justice issues.
  2. Establish common understanding of the meaning of diversity, equity and inclusion as it relates to the mission of the organization.
  3. Regularly include DEI considerations in decision-making and daily operations of the board, CBP staff and appointee/volunteer bodies.
  4. Ensure CBP staff and appointee/volunteer bodies have a mechanism for raising and addressing DEI issues within the organization.
  5. Ensure board, management and CBP staff have the skills and tools needed to advance DEI within the work of the organization.
5. *Advance DEI through GIT Workplans<sup>5</sup> and Outcomes.*
1. Engage communities of color, low income communities, and other underrepresented groups in development and implementation of the workplan.
  2. Explicitly consider within each workplan how to distribute benefits and improvements more equitably to communities of color, low income communities, and other underrepresented groups.
  3. Explicitly consider within each workplan how to reduce disproportionate adverse environmental impacts in communities of color, low income communities, and other underrepresented groups.
6. *Advance DEI through Communications.*
1. Ensure communication materials are culturally accessible, promote DEI goals, and reflect people of color, low income communities, and other underrepresented groups.
  2. Ensure distribution includes avenues designed for people of color, low income communities, and other underrepresented groups.

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<sup>5</sup> GITs include Sustainable Fisheries, Water Quality, Fostering Chesapeake Bay Stewardship, Habitat, Maintain Healthy Watersheds, Enhance Partnering, Leadership and Management

7. *Advance DEI through Grant-making and Contracting.*

1. Develop and explicitly include DEI and environmental justice criteria in grant targets and evaluation.
2. Provide grant outreach and project-management training to organizations run by and primarily serving communities of color and/or other underrepresented communities.
3. Ensure grant review committees include people of color and other underrepresented groups.
4. Promote non-discriminatory policies among applicant organizations, and incentivize applicants to increase DEI in their organizational practices.
5. Incentivize grant projects that align Chesapeake Bay restoration investments with community-identified needs.
6. Adopt policies and practices that promote DEI in contracting and consulting.

8. *Increase DEI performance of partners.*

1. Partner with organizations led or staffed by people of color or other underrepresented groups to implement the Chesapeake Bay Watershed Agreement.
2. Partner with organizations that engage people of color, low income communities, or other underrepresented groups to implement the Chesapeake Bay Watershed Agreement.
3. Encourage CBP partners to adopt and disseminate a clear DEI statement or policy.
4. Encourage CBP partners to adopt an organizational DEI Plan and assess progress on the plan annually.
5. Encourage partners to consider DEI in messaging, materials and distribution avenues.
6. Encourage CBP partners to offer DEI training and tools to their board, staff and volunteers.
7. Encourage CBP partners to track, analyze and report on the diversity of their board, management, staff, interns and other advisory groups as relevant.

## DEI Readiness Assessment: Evaluation Methodology

As described above, the assessment process integrated several different sources of information about DEI within the organization including document review, interviews, focus groups and survey results, as well as group discussions with the attendees of the Biennial Strategic Review Systems meeting and the Diversity Working Group. Skeo applied this information to evaluate each action outlined in the DEI Framework using the two scales described in Table 3.

Table 3. *DEI Assessment Evaluation Scales*

<i>Status (have the actions been taken?)</i>	<i>Assessment (what is the outcome of the actions?)</i>
N – No	1 – Not yet meeting goals
P – Partially	2 – Achieving goals
Y – Yes	3 – Exceeding goals

An assessment score of 1 represents an area where improvement is needed to achieve DEI goals. An assessment score of 2 represents a positive assessment that CBP is consistently meeting the DEI goals set for that action, though there still may be areas for improvement. An assessment score of 3 represents a practice that stands out as new, innovative and worthy of sharing with others for adoption more broadly in the field. The assessment also includes written findings explaining the scores with recommendations for improvement or enhancement.

The intent of this assessment is not for an organization to achieve a score of 3 across all criteria. A score of 2 represents a positive score that indicates the organization is performing well in achieving DEI goals.

## DEI Readiness Assessment: Key Themes and Assessment Scores

The recent adoption of the diversity goal in the Chesapeake Bay Watershed Agreement and the diligent planning and actions of key CBP staff, the Diversity Workgroup and other committed leaders throughout the organization have laid a strong foundation for advancing DEI at CBP. This advanced planning, along with the readiness of the staff, demonstrate that the organization is poised to make great strides in advancing DEI.

This assessment sets a baseline for some ambitious goals. The integrated assessment process of survey results, document review, interviews and focus groups indicates that while CBP has established a strong foundation for advancing DEI, there is much work yet to do to advance DEI within CBP. Many actions have not been started or are not yet meeting objectives; however, CBP now has a baseline and framework that can be used to prioritize and track both near- and long-term actions to improve DEI across the eight objectives over time.

The sections below outline key themes from survey results, document review, interviews and focus groups, followed by the assessment scores.

### Key Themes from Survey Results

Survey results show that 88-97% of survey respondents from across the organization believe that DEI practices will benefit CBP on the following measures:

- Ability to better serve the public,
- Broaden our partnerships,
- Advance our mission,
- Encourage diversity, equity and inclusion in decision-making,
- Expand our supporters, and
- Improve hiring and retention of diverse staff.

Survey results also show that respondents are not yet convinced that CBP is actively demonstrating a commitment to diversity, equity and inclusion. Only 25-35% of respondents agreed or strongly agreed that CBP actively demonstrates a commitment to each one of these three factors.

These survey results reflect a common experience in organizations who are building momentum to advance DEI – while attitudes towards DEI are favorable and staff tend to believe DEI can help the organization achieve its goals, they also recognize that demonstrating an active commitment means moving beyond individual positive beliefs or attitudes to institutionalized action and change.

## Key Themes from Document Review

The perceptions of survey respondents should be balanced with an understanding of the groundwork that has been laid to prepare CBP for institutionalized action and change. Much of this groundwork has been captured in key CBP guiding documents<sup>6</sup>. For example:

- The Chesapeake Bay Watershed Agreement includes a diversity goal, and environmental justice is one of the guiding principles of the agreement.
- The current (2018-2019) version of the Diversity Outcome Management Strategy includes a 22-page table documenting the status of diversity policies and programs in Chesapeake Bay Watershed Jurisdictions. The table includes documentation of existing policies and programs, existing funding and current gaps. This information will be an invaluable resource as CBP moves forward with implementation of the DEI Strategy.

Through review of the following four documents, the project team identified additional themes that provide a foundation for advancing diversity, equity and inclusion and environmental justice:

- *Diversity Outcome Management Strategy (2015-2025)*: Connects the Diversity goal to decision-making around conservation and restoration efforts. Offers six factors influencing success:
  1. Successfully targeting communications and outreach efforts.
  2. Reaching diverse communities to create employment and professional engagement opportunities.
  3. Engaging underrepresented communities that face environmental justice challenges.
  4. Creating metrics and tracking tools.
  5. Accounting for impacts from climate change, flooding and extreme weather.
  6. Incorporating diversity as a key component of other management strategies.

Captures current efforts and gaps related to these efforts as well as management approaches for the first four factors above.

- *Diversity Workgroup Outcome Logic Table and Work Plan (2018-2019)*: Describes the actions supporting the DWG's four key management approaches:
  1. Communications and Outreach
  2. Employment and Professional Engagement
  3. Promote Environmental Justice
  4. Tracking and Assessment
- *Governance and Management Framework for the Chesapeake Bay Program Partnership (September 13, 2018)*: Outlines the organizational structure of CBP, including leadership and membership of various bodies within CBP, and describes the process for decision-making through consensus-building. Document does not include specific mention of DEI factors that might

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<sup>6</sup> Detailed notes on the findings from the review of each of these documents can be found in the Appendix C: DEI Readiness Assessment Findings and Recommendations.

influence leadership and membership of the various bodies within CBP or that could be included as drivers in the decision-making process.

- *Chesapeake Progress – Diversity (April 30, 2019)*: Documents the baseline and goal for the diversity indicator as well as steps CBP is taking to reach that goal. Connects the diversity goal to allocating the benefits of conservation and restoration outcomes across all communities.

### Key Themes from Interviews and Focus Groups

Interviews and focus group discussions covered a range of topics including group operations and culture, what participants were most and least proud of at CBP, perceptions of DEI and feedback on a draft version of the DEI framework.

Interviews included representatives from the following groups:

- Citizens' Advisory Council (July 13, 2018)
- Goal Implementation Team Coordinators and Staffers (July 19, 2018)
- Scientific and Technical Advisory Committee (August 13, 2018)
- Goal Implementation Team Chairs (September 6, 2018)
- Management Board (October 18, 2018)
- Diversity Workgroup (November 13, 2018)

Focus groups dug deeper on the following two DEI topics:

- CBP's Internal Culture around DEI: a facilitated discussion with program staff (March 5, 2019)
- Incorporating DEI into Decision-Making at CBP: a facilitated discussion with staff, Management Board and GIT members (March 5, 2019)

Characteristics of CBP that interviewees were most proud of included:

- *Lifting up the Chesapeake Bay Watershed*: CBP focuses on the great natural resource of the Chesapeake Bay and ensures protecting the bay remains a focus of country's top leaders.
- *A culture of collaboration and partnerships*: CBP approaches the work in the spirit of partnership with other agencies and freely shares information and resources.
- *The desire to increase diversity and inclusion*: While CBP has room for improvement on diversity of voices, interviewees are proud that there is a desire for improving in this area.
- *Science-based decision-making and policy-making*: CBP uses science-based decision-making, emphasizes scientific rigor and develops policy based on science.
- *Transparent and accountable*: CBP's implements measures to ensure accountability, transparent decision-making and use of tax-payer dollars in an open, honest and efficient manner.
- *Connecting goals/priorities to outcomes at the state and federal levels*: CBP is able to identify priorities and integrate them into policies at the state and federal level.
- *Technical expertise*: CBP's Goal Implementation Teams have outstanding technical expertise.

Characteristics of CBP that interviewees were least proud of included:

- *When decision-making bows to politics*: Decisions can become influenced by politics rather than science.
- *The gap in social-science expertise*: The Scientific and Technical Advisory Committee (STAC) is not often asked to respond to social science questions. STAC used to have a cultural anthropologist, but currently is composed primarily of physical scientists and a few economists.



- *Need for increased diversity and inclusion:* Examples included:
  - Principle Staff Committee's demographics; especially that there are no people of color in leadership. Participants noted that several women are now a part of leadership, but there is still room to grow.
  - CBP tends to be complex, and long-term players speak in shorthand. This makes it difficult for newer folks to get included. There is a steep learning curve and it can be difficult to join the conversation.
  - There is a need for greater inclusion of the voices that are already in the room, in addition to expanding who is in the room.
- *CBP's reputation:* CBP is easily confused with other entities and there is also a healthy degree of skepticism from outsiders of the value of what CBP does.
- *The slow pace of institutional change:* Examples include:
  - CBP can be process-heavy and highly bureaucratic.
  - CBP's goals are water quality centric, and building the institutional momentum of STAC to shift direction is a slow process. CBP has been very slow to do substantive work in trying to gauge water quality on fisheries. It has only been in the last couple of years that CBP has begun to turn this corner, but progress is starting to happen.
- *Ability to prioritize:* CBP could improve its ability to strategically set priorities. The Chesapeake Bay Watershed Agreement has a lengthy list of goals and all of them are priorities, which makes it difficult to identify and advance high priority goals.

Perceptions of DEI included:

- *Positive DEI work within CBP:*
  - DEI was added as an outcome in the Chesapeake Bay Watershed Agreement, with some resistance, but participants consider it to be a big win for DEI.
  - The Diversity Working Group is continuing to keep the DEI discussion at the forefront for CBP leadership.
  - DEI is a part of continued discussions with Coordinators/Staffers. They utilize mapping tools such as EJ Screen to bring DEI information forward with other data layers that affect their work to keep the conversation going.
  - A recent DEI survey helped CBP set staff diversity targets that match the racial and ethnic demographics of the watershed.
- *Increasing DEI in operations and decision-making will require capacity building within CBP:*
  - DEI is an important issue that currently comes up in meetings topically. Participants are interested in seeing DEI embedded into CBP's operations throughout, but to make this happen, it will take consistent champions in leadership at the top levels of the organization.
  - There are different levels of understanding and interest in DEI topics across the Chesapeake Bay Program; sometimes, the resistance to ideas or proposals related to DEI can be palpable within the room.
  - Resources and tools are needed to create a common understanding of DEI, especially resources that can help bring along members of CBP who may not understand why DEI issues are important to achieving the goals of the Chesapeake Bay Watershed Agreement.
  - There is concern that DEI does not currently factor into many decision-making processes at CBP.
- *Barriers to increasing diversity:*

- Folks who largely look the same are making decisions about the Chesapeake Bay population, which looks very different from the people who are in the room at CBP. More diverse communities need to be at the table and included in the decision-making process. This reality may lead to some of the skepticism about CBP.
  - The federal hiring process presents barriers to increasing diversity of CBP staff.
  - The volunteer nature of other groups within CBP can also present barriers to increasing diversity. For example, membership in the STAC is based on voluntary participation and scientific expertise. The pool is a short list of people through nominations. STAC is not incentivized monetarily, which may be prohibitive to increasing diversity.
- *Ownership of DEI varies:* Some groups within CBP are supportive of DEI and increased diversity, but view it as the responsibility of groups other than their own to promote and make these changes.

## Readiness Assessment Scores

Table 4 captures the DEI Readiness Assessment scores for CBP. The findings and recommendations that support these scores and form the basis for the DEI Assessment Recommendations in Chapter 3 can be found in the Appendix C: DEI Readiness Assessment Findings and Recommendations.

Table 4. DEI Readiness Assessment Scores

Objectives and Actions	Status <sup>7</sup>			Assessment <sup>8</sup>		
	N	P	Y	1	2	3
<b>Objective 1. Create an Authorizing Environment</b>						
1.1 Include specific DEI and environmental justice (EJ) goals in the Chesapeake Bay Watershed Agreement.		✓		✓		
1.2 Adopt and disseminate a clear DEI statement or policy.	✓			✓		
1.3 Adopt an organizational DEI Plan.			✓	✓		
1.4 Track, analyze and report on the measures of the DEI plan.		✓			✓	
1.5 Include DEI measures in the performance goals for senior and mid-level managers.	✓			✓		
1.6 Create a Management Board-level Diversity or DEI Committee or equivalent.	✓			✓		
<b>Objective 2. Increase DEI in Hiring, Promotion and Tenure within CBPO Staff<sup>9</sup></b>						
2.1 Encourage partner entities to promote DEI in hiring, promotion and tenure policies, practices and procedures consistent with fair hiring practices.		✓		✓		
2.2 Encourage partner entities to include people of color and other underrepresented groups in hiring and promotion committees.		✓		✓		
2.3 Encourage partner entities to conduct proactive outreach and recruitment to increase representation of people of color and other underrepresented groups in management, CBP staff and intern positions.		✓		✓		
2.4 Encourage partner entities to seek opportunities to provide professional development, promote and retain people of color and other underrepresented groups across management, CBP staff and intern positions.		✓		✓		
<b>Objective 3. Increase DEI in Appointee and Volunteer Bodies</b>						
3.1 Conduct proactive outreach and recruitment to increase representation of people of color and other underrepresented groups on the Management Board, Advisory Committees, Goal Implementation Teams and Workgroups.		✓		✓		
3.2 Seek opportunities to support and retain people of color and other underrepresented groups on the Management Board, Advisory Committees, Goal Implementation Teams and Workgroups.	✓			✓		
<b>Objective 4. Increase DEI in Internal Culture and Training</b>						
4.1 Provide CBP staff and Management Board training and tools on DEI, racial equity and environmental justice issues.		✓			✓	

<sup>7</sup> Status (have the actions been taken?): N – No; P – Partially; Y – Yes.

<sup>8</sup> Assessment (what is the outcome of the actions?): 1 – Not yet meeting goals; 2 – Achieving goals; 3 – Exceeding goals.

<sup>9</sup> CBPO Staff include all employees who work at the CBP offices in Annapolis, Maryland, and serve in a variety of roles and capacities to advance and coordinate the work of the larger partnership. They include employees of federal agencies and contractors, non-profit organizations and academic institutions. Specific federal agencies include: the Environmental Protection Agency, National Parks System, Forest Service, Geological Survey and National Oceanic and Atmospheric Administration. See <https://www.chesapeakebay.net/who/staff>.

Objectives and Actions	Status <sup>7</sup>			Assessment <sup>8</sup>		
	N	P	Y	1	2	3
4.2 Establish common understanding of the meaning of diversity, equity and inclusion as it relates to the mission of the organization.		✓		✓		
4.3 Regularly include DEI considerations in decision-making and daily operations of the board, CBP staff and appointee/volunteer bodies.	✓			✓		
4.4 Ensure CBP staff and appointee/volunteer bodies have a mechanism for raising and addressing DEI issues within the organization.	✓			✓		
4.5 Ensure board, management and CBP staff have the skills and tools needed to advance DEI within the work of the organization.	✓			✓		
<b>Objective 5. Advance DEI through GIT Workplans<sup>10</sup> and Outcomes</b>						
5.1 Engage communities of color, low income communities, and other underrepresented groups in development and implementation of the workplan.	✓			✓		
5.2 Explicitly consider within each workplan how to distribute benefits and improvements more equitably to communities of color, low income communities, and other underrepresented groups.	✓			✓		
5.3 Explicitly consider within each workplan how to reduce disproportionate adverse environmental impacts in communities of color, low income communities, and other underrepresented groups.	✓			✓		
<b>Objective 6. Advance DEI through Communications</b>						
6.1 Ensure communication materials are culturally accessible, promote DEI goals, and reflect people of color, low income communities and other underrepresented groups.		✓		✓		
6.2 Ensure distribution includes avenues designed for people of color, low income communities, and other underrepresented groups.		✓		✓		
<b>Objective 7. Advance DEI through Grant-making and Contracting</b>						
7.1 Develop and explicitly include DEI and environmental justice criteria in grant targets and evaluation.		✓		✓		
7.2 Provide grant outreach and project-management training to organizations run by and primarily serving communities of color and/or other underrepresented communities.		✓		✓		
7.3 Ensure grant review committees include people of color and other underrepresented groups.	✓			✓		
7.4 Promote non-discriminatory policies among applicant organizations, and incentivize applicants to increase DEI in their organizational practices.	✓			✓		
7.5 Incentivize grant projects that align Chesapeake Bay restoration investments with community-identified needs.	✓			✓		
7.6 Adopt policies and practices that promote DEI in contracting and consulting.	✓			✓		
<b>Objective 8. Increase DEI Performance of Partners</b>						
8.1 Partner with organizations led or staffed by people of color or other underrepresented groups to implement the Chesapeake Bay Watershed Agreement.		✓		✓		
8.2 Partner with organizations that engage people of color, low income communities, or other underrepresented groups to implement the Chesapeake Bay Watershed Agreement.		✓		✓		

<sup>10</sup> GITs include Sustainable Fisheries, Water Quality, Fostering Chesapeake Bay Stewardship, Habitat, Maintain Healthy Watersheds, Enhance Partnering, Leadership and Management

Objectives and Actions	Status <sup>7</sup>			Assessment <sup>8</sup>		
	N	P	Y	1	2	3
<i>8.3 Encourage CBP partners to adopt and disseminate a clear DEI statement or policy.</i>	✓			✓		
<i>8.4 Encourage CBP partners to adopt an organizational DEI Plan and assess progress on the plan annually.</i>	✓			✓		
<i>8.5 Encourage partners to consider DEI in messaging, materials and distribution avenues.</i>	✓			✓		
<i>8.6 Encourage CBP partners to offer DEI training and tools to their board, staff and volunteers.</i>		✓			✓	
<i>8.7 Encourage CBP partners to track, analyze and report on the diversity of their board, management, staff, interns and other advisory groups as relevant.</i>		✓		✓		

## Chapter 3: DEI Strategy

Based on the outcomes of the DEI Readiness Assessment Findings and Recommendations, the project team identified a series of recommendations to help CBP build on its strengths and further advance diversity, equity, inclusion and environmental justice. The DEI Strategy includes recommendations that are grouped into the four DEI Framework focus areas:

1. Strengthen CBP's authorizing environment. (Objective 1)
2. Advance DEI internally. (Objectives 2-4)
3. Advance DEI through mission-related work. (Objectives 5-7)
4. Advance DEI of CBP partners. (Objective 8)

### 1. Strengthen CBP's Authorizing Environment

To strengthen CBP's authorizing environment for DEI:

1. *Adopt a clear and succinct DEI statement that fully captures definitions for DEI and EJ and how each of these topics relates to and advances the mission of CBP.*
2. *Update the Management Strategies, as needed, to explicitly articulate the roles of diversity, equity, inclusion and environmental justice in achieving CBP's mission and guiding implementation of the agreement.*
3. *Clarify language in authorizing and governance documents to reflect a priority on developing long-term relationships with organizations run by and primarily serving communities of color and other underrepresented communities (in addition to, and distinct from organizations that engage communities of color and other underrepresented communities but are not led by representatives of these communities.) This includes the Governance and Management Framework as well as the Management Strategy documents.*
4. *Update the Governance and Management Framework for the Chesapeake Bay Partnership to include a) explicit diversity goals for each group in their "Leadership and Membership" sections, b) language describing the role and impact of DEI and EJ considerations in the "Process for Decision-Making" section, and c) mechanisms for raising and addressing partnership-related DEI issues.*
5. *Biennially, incorporate changes related to the DEI Strategy annual action priorities throughout both the Diversity Outcome Management Strategy and the DWG Outcome Logic Table and Workplan.*
6. *In addition to diversity and environmental justice, explicitly articulate equity and inclusion in the next iteration of the Chesapeake Bay Watershed Agreement.*

*It was a major success to have the 2015 Chesapeake Bay Watershed Agreement clearly articulate a diversity outcome and state as a goal incorporating an EJ principle. The 2025 Chesapeake Bay Watershed Agreement should reflect the progress CBP makes between 2015 and 2025.*

## 2. Advance DEI Internally

To advance DEI internally:

1. *Increase diversity and inclusion for staff, appointees, and volunteer bodies:*
  - a. Document and biennially evaluate efforts to promote DEI in hiring, promotion and tenure policies.<sup>11</sup>
  - b. Re-structure hiring and promotion committees as needed to include people of color and other underrepresented groups.
  - c. Document and biennially evaluate efforts to increase representation of people of color and other underrepresented groups (including recommendations from “d” below) across management, CBP staff, intern positions, Management Board, Advisory Committees, Goal Implementation Teams and Workgroups. This includes efforts at outreach, recruitment, professional development, and retention.
  - d. Ask people of color and other underrepresented groups (in a supportive setting) what is working well for them in the current work environment and what additional resources or supports are needed to increase equity and inclusion in the workplace, provide relevant professional development, and increase promotion and retention rates.
  - e. Track number, percent, retention and advancement of people of color and other underrepresented groups across management, CBP staff, intern positions, Management Board, Advisory Committees, Goal Implementation Teams and Workgroups over time.
2. *Build a common understanding of and expanded capacity for DEI:*
  - a. Prominently advertise, incentivize and recruit for the 2019-2020 trainings. Ensure participation from staff and management board.
  - b. Use the 2019-2020 trainings to build a common understanding of the meaning of diversity, equity and inclusion and connect these topics to CBP’s mission. Discussion during these trainings may inform development of the DEI statement recommended above.
  - c. Develop and prioritize a list of additional trainings CBP can provide annually. (In the near-term, ask 2019-2020 training participants to evaluate the training(s) they attend and provide feedback on what additional training could be valuable for them and for their colleagues.)
  - d. Include discussion time regarding the newly adopted DEI statement and the changes to the Governance and Management Framework into the agendas of each group identified in the Governance and Management Framework document.
  - e. Provide or set aside specific funding to send management board and staff members to DEI-related conferences and events so that they can start building a professional network focused on advancing DEI in watershed restoration work.
3. *Institutionalize efforts to advance DEI internally:*
  - a. Develop and broadly disseminate the tools CBP identifies and/or develops on DEI, racial equity and EJ issues.
  - b. Seek additional funding for implementing the annual action priorities of the DEI Strategy.
  - c. Document and biennially evaluate efforts to raise and address DEI and EJ issues by each group in the Governance and Management Framework.

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<sup>11</sup> The federal hiring process includes some constraints that may make this goal difficult to achieve; therefore, close monitoring and yearly adjustments to amplify the strategies that are working is recommended

- d. Include an emphasis on DEI in all staff onboarding materials so that new staff know that DEI is a priority for CBP.
- e. Incorporate DEI measures into staff performance goals. This could include developing and adding DEI measures to performance goals for senior and mid-level managers as well as a self-evaluation of DEI efforts into staff performance evaluations.

Building momentum to implement these actions may be a significant cultural shift for an organization where decision-making has historically been focused on environmental metrics; therefore, close monitoring and yearly adjustments to amplify the DEI strategies that are working is recommended.

### 3. Advance DEI through Mission-Related Work

To advance DEI through watershed restoration work:

1. *Clarify the distinction between (1) organizations that are run by and primarily serve communities of color and other underrepresented communities and (2) other organizations that engage these communities:*
  - a. Clarify language in DEI authorizing and governing documents, grant-making guidance and related implementation actions to reflect a priority on developing long-term relationships with organizations run by and primarily serving communities of color and other underrepresented communities (in addition to and distinct from organizations that engage communities of color and other underrepresented communities but are not led by representatives of those communities).
  - b. Ensure that tracking efforts – especially those tracking funding allocation - maintain the distinction between organizations run by and primarily serving communities of color and other underrepresented communities versus community-based organizations that are not led by the community they serve or engage.

There is value in supporting both types of community-based groups; however, if the distinction is not made in goals and data tracking, resources usually gravitate towards organizations that are not led by the community they serve or engage due to the fact that organizations founded and led by people of color and other underrepresented groups have historically been under-resourced and had challenges breaking into mainstream, predominately white environmental funding streams.

2. *Build relationships with communities of color, low income communities and other underrepresented groups, and incorporate these leaders into decision-making and implementation:*
  - a. Participate in EJ-led gatherings, such as ongoing engagement in the University of Maryland School of Public Health DMV EJ conference (consider becoming a sponsor) to build CBP's professional network and bring discussion about implementation of the Chesapeake Bay Watershed Agreement directly into EJ-led spaces.
  - b. Develop a better understanding of environmental justice communities and organizations in the Chesapeake Bay Watershed. This could include conducting stakeholder mapping exercise(s) to become familiar with what organizations are doing environmental justice work and related social justice work in the watershed. This could also include mapping exercises to identify communities of color and low income communities relative to CBP investments.



- c. Evaluate the possibility of starting a Community Advisory Board (or similar entity) – composed of compensated environmental justice leaders and representatives from organizations led by people of color and other underrepresented groups – that could serve as (1) a sounding board and resource for development and implementation of the Chesapeake Bay Watershed Agreement, including GIT workplans and grant-making, and (2) a feeder pool for identifying and developing leaders from communities of color, low income communities and other underrepresented groups to serve as representatives on groups throughout the Governance and Management Framework.
  - d. Lift up the work of organizations doing environmental justice and related social justice work in the Chesapeake Bay Watershed. This could take the form of an “innovation conference,” case studies, webinars or other ways of getting the word out.
- 3. *Advance diversity, equity and inclusion through GIT workplan development and implementation.*
  - a. Identify specific decision-points and other milestones within the GIT workplans and other governance and management processes supporting the development and implementation of the Chesapeake Bay Watershed Agreement, where communities of color, low income communities and other underrepresented groups can influence the development and implementation of the Chesapeake Bay Watershed Agreement.
  - b. Review each GIT workplan and ensure inclusion of considerations for equitable distribution of benefits and improvements and considerations for reduction of disproportionate adverse environmental impacts in communities of color, low income communities and other underrepresented groups.
  - c. Ensure implementation partnerships include (1) organizations that are run by and primarily serve communities of color and other underrepresented communities and (2) other organizations that engage these communities. In the near-term, place an emphasis on increasing the former, as the groups are currently underrepresented in CBP’s partnerships.
- 4. *Advance diversity, equity and inclusion through grantmaking:*
  - a. Annually, review the U.S. EPA CBP Office Grant and Cooperative Agreement Guidance to include DEI and EJ considerations/language.
  - b. Include DEI and EJ criteria in grant targets and evaluation managed directly by CBP.
  - c. Develop grantmaking guidelines that promote non-discriminatory policies among applicant organizations, incentivize applicants to increase DEI in their organizational practices, encourage restoration investments that align with community-identified needs and benefits, and encourage capacity building investments in organizations that are run by and primarily serve communities of color and other underrepresented communities.
  - d. Begin increasing and tracking representation of people of color and other underrepresented groups on grant review committees.
  - e. Host or participate in a gathering of funders to share lessons learned and build CBP’s professional network for advancing DEI and EJ through grantmaking.
- 5. *Review and strengthen diversity, equity and inclusion in watershed restoration outreach, materials, activities and events:*
  - a. Implement existing DWG strategies and actions (as stated in the DWG Management Strategy and workplan) that promote partnerships with organizations that engage people of color, low income communities or other underrepresented groups (e.g., management approaches 1.3, 1.4, 4.2 and 4.3) and track outcomes and lessons learned.

- b. Expand DWG strategies and actions that promote partnerships with organizations that are run by and primarily serve communities of color and other underrepresented communities.
- c. Develop an evaluation template for GITs to use during the next workplan update cycle to (1) explicitly consider the equitable distribution of benefits and improvements and (2) to explicitly consider the reduction of disproportionate adverse environmental impacts.
- d. Conduct a review of communications materials to identify potential areas for improvement, and develop straightforward, accessible DEI communications guidance to ensure future communications materials feel welcoming and are accessible to all.
- e. Develop and distribute straightforward, accessible guidance on distribution of communication materials. This may include developing a living database of distribution avenues that reach people of color, low income communities and other underrepresented groups. It may also include researching how to better target and grow effectiveness of communications with populations who are untapped or under-tapped but have high levels of support for environmental restoration.
- f. Develop straightforward, accessible guidance on promoting DEI in contracting and consulting.
- g. Review these preliminary recommendations with communities of color, low income communities and other underrepresented groups to ensure that the recommendations are well-informed prior to implementation.

#### 4. Advance DEI Performance of Partners

To advance DEI performance of partners:

1. *Increase access to DEI training and capacity building. Prominently advertise, incentivize and recruit for the 2019-2020 trainings and distribute tools developed under this grant to CBP Partners. Request feedback on the training and tools and additional trainings and tools could be valuable for them and for their colleagues. Encourage partner organizations to offer DEI trainings to their board, staff and volunteers.*
2. *Share the CBP's DEI statement or policy with CPB partners once it is developed. Consider offering a webinar or pursuing other opportunities for discussion and dissemination of both the CBP DEI statement and the lessons learned in developing and adopting the statement. (For example, the annual Chesapeake Bay Watershed Forum may be a good venue to share the CBP DEI statement and goals with a broader watershed-wide audience, as well as the annual Choose Clean Water Coalition conference.)*
3. *Build off the dissemination of the DEI statement by offering a follow up webinar for CBP Partners that takes a deeper dive into DEI plans, tracking and assessment.*
4. *Develop and distribute straightforward, accessible guidance on including DEI and EJ criteria in grant targets and evaluation to CBP Partners.*
5. *Develop and share the DEI communication and distribution guidance broadly among CBP Partners.*
6. *Develop tracking and reporting guidance to share broadly among CBP Partners. Where feasible, point CBP Partners to tools that are already established in the field. Develop an biennial report to capture CBP Partner tracking outcomes to help build momentum and accountability across the partnership – this report could start by tracking diversity of board, management and staff, and then add additional measures as CBP roles out best practices, tools and resources to its partners.*

## Chapter 4: DEI Strategy Action Plans

The action plans for implementing the DEI Strategy follow the structure of the four main focus areas identified in Chapter 3. Each action plan includes discussion of the task, lead, and expected timeframe. The plans also include descriptions of potential tools and resources needed.

While the action plans address all of the recommendations from the DEI Strategy, some priority focus areas where CBP can make the biggest difference in advancing DEI and EJ have been identified in the Timeframe column of the action plans to help guide near-term implementation efforts. The action plan charts are intended to be living documents and these priority focus areas should be updated on a biennial basis to build momentum for implementation.

The following principles can help guide successful implementation:

- ***Restoration happens from the inside out*** – Put in place the organizational infrastructure and foster the cultural shifts needed to support successful implementation over the long-term.
- ***Accountability is key to success*** - Include a review, reporting and update cycle in the action plan document. While individual staff or board members may be responsible for specific pieces of the DEI Action Plan, the Diversity Workgroup can retain a central role in the review, reporting and update cycle for this document, reviewing outcomes on an annual or biennial basis (depending on the outcome) and refining the action plan based on feedback and lessons learned.
- ***Measure both implementation actions and their impacts*** –The action plans identify specific measures to examine impacts through quantifiable change, but some actions make take time to achieve a quantifiable change. Therefore, documenting and evaluating the implementation actions for each action can also provide valuable information. This process could include answering the following questions: “Have implementation actions have been taken? What’s working and what isn’t? What else is needed?” Answering these questions can lead to insights and real-time learning that helps CBP to refine action items and arrive at quantifiable change more quickly.

## 1. Strengthening CBP's authorizing environment for DEI

Action	Timeframe <sup>12</sup> (* indicates 2020-2021 priorities)	Measures of Success	Roles	Potential Resources and Tools
1.1. Adopt a clear and succinct DEI statement that fully captures definitions for DEI and EJ and how each of these topics relates to and advances the mission of CBP.	<i>*Phase 1:</i> Develop and adopt a statement. <i>Ongoing:</i> Review the statement annually and update based on lessons learned.	Has a DEI Statement been adopted?	<i>Lead:</i> Management Board <i>Supports:</i> Consultant, Diversity Workgroup, GIT6 (Enhance Partnering, Leadership, and Management GIT), Stewardship GIT, Communications Team	Use consultant support to help draft this statement.
1.2. Update the Management Strategies, as needed, to explicitly articulate the roles of diversity, equity, inclusion and environmental justice in achieving CBP's mission and guiding implementation of the agreement.	<i>*Phase 1:</i> Following the adoption of the DEI Statement, use the SRS process to incorporate this language into the Management Strategies. <i>Ongoing:</i> Continue incorporating this language as different cohorts enter the SRS process; incorporate future changes as needed when the statement is updated.	Has the Management Strategy been updated?	<i>Lead:</i> All GITs and workgroups that oversee Watershed Agreement outcomes <i>Supports:</i> Diversity Workgroup, GIT6, SRS Team	See DEI Statement developed in 1.1 and move language over into the Management Strategy as appropriate.
1.3. Clarify language in authorizing documents to reflect a priority on developing long-term relationships with organizations run by and primarily serving communities of color and other underrepresented communities (in addition to, and distinct from organizations that engage communities of color and other underrepresented communities but are not led by representatives of these communities.)	<i>*Phase 1:</i> Incorporate this language following adoption of the DEI Statement (based on the various document cycles that exist within CBP). <i>Ongoing:</i> Incorporate future changes as needed when the statement is updated.	Have authorizing framework documents been updated?	<i>Lead:</i> Management Board, GIT6 <i>Supports:</i> Diversity Workgroup, Stewardship GIT	See DEI Statement developed in 1.2 and move language over into the Management Strategy as appropriate.
1.4. Update the Governance and Management Framework for the Chesapeake Bay Partnership to include a) explicit diversity goals for each group in their "Leadership and Membership" sections, b) language	<i>*Phase 1:</i> Develop and incorporate this language. <i>Ongoing:</i> Review the language annually and update as	Has the Governance and Management Framework been updated?	<i>Lead:</i> Management Board, GIT6 <i>Supports:</i> Diversity Workgroup, Stewardship GIT	Use consultant support to help draft the language describing the role and impact of DEI and EJ considerations

<sup>12</sup> Phase 1 indicates the activities which should take place initially when implementing the action.

describing the role and impact of DEI and EJ considerations in the “Process for Decision-Making” section, and c) mechanisms for raising and addressing DEI issues.	needed based on lessons learned.			in the “Process for Decision-Making” section.
1.5. Biennially, incorporate changes related to the DEI Strategy annual action priorities throughout both the Diversity Outcome Management Strategy and the DWG Outcome Logic Table and Workplan.	<i>*Ongoing:</i> Identify and incorporate changes needed to these documents based on the annual action priorities.	Have top priority changes for this year been incorporated in these documents?	<i>Lead:</i> Diversity Workgroup <i>Supports:</i>	DEI Strategy – biennial action priorities.
1.6. In addition to diversity and environmental justice, explicitly articulate equity and inclusion in the next iteration of the Chesapeake Bay Watershed Agreement.	<i>Ongoing:</i> Include this language in any future iterations of the Chesapeake Bay Watershed Agreement.	Does the next iteration of the Chesapeake Bay Watershed Agreement incorporate equity and inclusion as outcomes?	<i>Lead:</i> Chesapeake Executive Council, PSC, Management Board <i>Supports:</i> Diversity Workgroup, Stewardship GIT, Communications Team	See DEI Statement developed in 1.2 and propose and adopt similar language about outcomes for equity and inclusion.

## 2. Advancing DEI Internally

### 2.1 Increase diversity and inclusion for staff, appointees, and volunteer bodies:

Action	Timeframe (* indicates 2020-2021 priorities)	Measures of Success	Roles	Potential Resources and Tools
2.1.a. a. Document and biennially evaluate efforts to promote DEI in hiring, promotion and tenure policies.	<i>Phase 1:</i> Develop best practices scan and prioritize strategies. <i>Ongoing:</i> Annual reporting and evaluation. Remain in conversation with the lead for 2.1.e about what implementation efforts are improving representation and what else is needed.	What changes have been made to policy? What are the results (see outcome measures for 2.1.f)?	<i>Lead:</i> Signatories and partnership organizations (including organizations that staff CBPO) <i>Supports:</i> Diversity Workgroup	Develop a scan of best practices for federal and state partners. See especially, <a href="#">Leaking Talent: How People of Color are Pushed Out of Environmental Organizations</a> (Johnson, 2019).
2.1.b. Re-structure hiring and promotion committees as needed to include people of color and other underrepresented groups.	<i>Phase 1:</i> Evaluate opportunities for restructuring and implement changes. <i>Ongoing:</i> Continue to track representation on hiring committees and course correct as needed.	Increased representation on hiring and promotion committees over time.	<i>Lead:</i> Signatories and partnership organizations (including organizations that staff CBPO) <i>Supports:</i> Diversity Workgroup	--
2.1.c. Document and biennially evaluate efforts to increase representation of people of color and other underrepresented groups	<i>Phase 1:</i> Develop best practices scan and prioritize strategies. Coordinate with 2.1.d	Increased representation across groups over time.	<i>Lead:</i> Diversity Workgroup <i>Supports:</i> Organizations that fill CBP staff and	Develop a scan of best practices for federal and state partners. Ask people in presently underrepresented

(including recommendations from “d” below) across management, CBP staff, intern positions, Management Board, Advisory Committees, Goal Implementation Teams and Workgroups. This includes efforts at outreach, recruitment, professional development and retention.	on a focus group or survey. <i>Ongoing:</i> Annual reporting and evaluation. Remain in conversation with the lead for 2.1.e about what implementation efforts are improving representation and what else is needed.		internship positions, Management Board, Advisory Committees, Goal Implementation Teams and Workgroups (particularly, staff and Chairs of these groups).	groups what changes could be made (see 2.1.d).
2.1.d. Ask people of color and other underrepresented groups (in a supportive setting) what is working well for them in the current work environment and what additional resources or supports are needed to increase equity and inclusion in the workplace, provide relevant professional development, and increase promotion and retention rates.	<i>*Phase 1:</i> Conduct a focus group or distribute a survey. Prioritize recommendations for implementation. <i>Phase 2:</i> Implement recommendations. <i>Ongoing:</i> Track feedback over time about staff sense of belonging and additional recommendations.	Has sense of belonging increased among people of color and other underrepresented groups?  What feedback do staff have on how well implementation of their recommendations is going?	<i>Lead:</i> Consultant in Y1 (and possibly future years as well) <i>Supports:</i> Diversity Workgroup	Use consultant support to develop a template set of questions that could be used in a focus group conversation or a survey.  Coordinate with the Office of Water SEPAC to review the Office of Water Diversity Dashboard for data, and identify suggested approaches and tools that may be helpful in the areas of promotion and retention.
2.1.e. Track number, percent, retention and advancement of people of color and other underrepresented groups across management, CBP staff, intern positions, Management Board, Advisory Committees, Goal Implementation Teams and Workgroups over time.	<i>Phase 1:</i> Identify what measures are currently being tracked. <i>Year 2:</i> Establish a tracking tool and process for tracking with each group. Begin tracking. <i>Ongoing:</i> Continue tracking. Remain in conversation with the lead for 2.1.a about what implementation efforts are improving representation and what else is needed.	Increased representation over time across each group?  Are representation goals being met?	<i>Lead:</i> Diversity Workgroup <i>Supports:</i> Organizations that fill CBP staff and internship positions, Management Board, Advisory Committees, Goal Implementation Teams and Workgroups (particularly, staff and Chairs of these groups).	--

## 2.2 Build a common understanding and expanded capacity for DEI:

Action	Timeframe (* indicates 2020-2021 priorities)	Measures of Success	Roles	Potential Resources and Tools
2.2.a. Prominently advertise, incentivize and recruit for the 2019-2020 trainings. Ensure participation from staff and management board.	<i>*Phase 1:</i> Conduct Fall 2019-Winter 2020 trainings.	Were attendance goals met for each training?	<i>Lead:</i> Consultant, Diversity Workgroup, GIT 6 <i>Supports:</i> Leadership	Use consultant support to design and implement these trainings.

2.2.b. Use the 2019-2020 trainings to build a common understanding of the meaning of diversity, equity and inclusion and connect these topics to CBP's mission. Discussion during these trainings may inform development of the DEI statement recommended above.	<i>*Phase 1:</i> Collect insights during Fall 2019-Winter 2020 trainings.	Were insights from the trainings considered in the development of the DEI Statement?	<i>Lead:</i> Consultant <i>Supports:</i> Diversity Workgroup	Use consultant support to use insights from these trainings to inform the development of the DEI Statement.
2.2.c. Develop and prioritize a list of additional trainings CBP can provide annually.	<i>*Phase 1:</i> Gather feedback during Fall 2019-Winter 2020 trainings and develop a list of potential future trainings. <i>Ongoing:</i> Prioritize trainings to offer annually, and continue updating list with additional training needs.	Does CBP have a list of prioritized trainings to provide in future years?	<i>Lead:</i> Diversity Workgroup <i>Supports:</i> Consultant, Other Goal Implementation Teams and workgroups	Use consultant support to gather feedback from participants and develop a list of additional trainings CBP could provide.
2.2.d. Include discussion time regarding the newly adopted DEI statement and the changes to the Governance and Management Framework into the agendas of each group identified in the Governance and Management Framework document.	<i>Phase 1:</i> Discuss these changes. <i>Ongoing:</i> Discuss lessons learned, and identify any additional recommended changes (either to the language of these documents or to the operations of the group) based on these learnings.	Has each group discussed these changes to the CBP authorizing framework and how the changes will impact their work going forward?	<i>Lead:</i> Goal Implementation Teams and Workgroups (particularly, staff and Chairs of these groups). <i>Supports:</i> Diversity Workgroup	--
2.2.e. Provide or set aside specific funding to send management board and staff members to DEI-related conferences and events so that they can start building a professional network focused on advancing DEI in watershed restoration work.	<i>*Ongoing:</i> Identify funding goals and advocate for their inclusion in the upcoming FY budget. Continue expanding the reference list.	What events have been attended, and by which groups?	<i>Lead:</i> Management Board and other leadership <i>Supports:</i>	Develop a living reference list of DEI-related conferences and events for management board and staff to select from.

### 2.3 Institutionalize efforts to advance DEI internally:

Action	Timeframe (* indicates 2020-2021 priorities)	Measures of Success	Roles	Potential Resources and Tools
2.3.a. Develop and broadly disseminate the tools CBP identifies and/or develops on DEI, racial equity and EJ issues.	<i>*Ongoing:</i> Build the reference list (see Chapter 5 of this document), and disseminate the tools within CBP.	Have the tools developed in the past year been disseminated within CBP? Are they being used?	<i>Lead:</i> Diversity Workgroup <i>Supports:</i> CBP Web Team, Communications Team, Organizations in the CBP Partnership, Goal Implementation Teams and Workgroups	Build a reference list of all tools and resources.

2.3.b. Seek additional funding for implementing the annual action priorities of the DEI Strategy.	<i>*Ongoing:</i> Identify funding goals and advocate for their inclusion in the upcoming FY budget. Continue expanding the reference list.	Have funding goals been identified? Has funding been allocated?	<i>Lead:</i> Signatories and partnership organizations (including organizations that staff CBPO), Management Board	Annual priorities in the DEI Strategy.
2.3.c. Document and biennially evaluate efforts to raise and address DEI and EJ issues by each group in the Governance and Management Framework.	<i>Phase 1:</i> Develop a tracking tool and begin using it to evaluate and provide feedback on efforts to raise and address DEI and EJ issues. <i>Ongoing:</i> Continue using and refining tracking tool.	Have efforts been documented and evaluated? Have recommendations been delivered back to the relevant groups?	<i>Lead:</i> Diversity Workgroup <i>Supports:</i> Goal Implementation Teams and Workgroups, Management Board	Develop a tracking tool to help with documentation and evaluation.
2.3.d. Include an emphasis on DEI in all staff onboarding materials so that new staff know that DEI is a priority for CBP.	<i>Phase 1:</i> Explore, develop and test options for DEI onboarding materials and/or activities. <i>Ongoing:</i> Continue using and refining the DEI onboarding materials.	Have DEI onboarding materials been developed and implemented? Have refinements been implemented from one year to the next?	<i>Lead:</i> Organizations that staff CBPO  <i>Supports:</i> Diversity Workgroup	Develop DEI onboarding materials and/or activities.
2.3.e. Incorporate DEI measures into staff performance goals. This could include developing and adding DEI measures to performance goals for senior and mid-level managers as well as a self-evaluation of DEI efforts into staff performance evaluations.	<i>Phase 1:</i> Develop DEI measures and self-evaluation questions (some may be broadly applicable, and some may apply to specific roles). <i>Ongoing:</i> Continue using and refining self-evaluation tool	Have efforts been documented and evaluated? Have recommendations been implemented from one year to the next?	<i>Lead:</i> Signatories and partnership organizations (including organizations that staff CBPO) <i>Supports:</i> Diversity Workgroup	Develop DEI measures and self-evaluation questions.



### 3. Advancing DEI through Watershed Restoration Work

#### 3.1 Clarify the distinction between (1) organizations that are run by and primarily serve communities of color and other underrepresented communities and (2) other organizations that engage these communities:

Action	Timeframe (* indicates 2020-2021 priorities)	Measures of Success	Roles	Potential Resources and Tools
3.1.a. Clarify language in DEI authorizing and governing documents, grant-making guidance and related implementation actions to reflect a priority on developing long-term relationships with organizations run by and primarily serving communities of color and other underrepresented communities (in addition to and distinct from organizations that engage communities of color and other underrepresented communities but are not led by representatives of those communities).	<i>*Phase 1:</i> Develop the recommended resources and tools, and implement updates to documents and guidance. <i>Ongoing:</i> Evaluate language annually for any changes needed based on lessons learned.	Have changes been made to DEI planning documents, grant-making guidance and related implementation actions?	<i>Lead:</i> CBP Grants Team, Grant-Making organizations in the partnership <i>Supports:</i> Diversity Workgroup	Develop a list of documents and guidance where this language should be updated. Develop suggested template language, which can be tailored to each document (may reference the DEI Statement).
3.1.b. Ensure that tracking efforts – especially those tracking funding allocation - maintain the distinction between organizations run by and primarily serving communities of color and other underrepresented communities versus community-based organizations that are not led by the community they serve or engage.	<i>*Phase 1:</i> Develop tracking distinctions. <i>Ongoing:</i> Continue tracking, and evaluate changes over time in relationships and funding allocation to both groups.	Are these groups being tracked separately? Are relationships increasing, and is funding becoming more oriented towards organizations run by and primarily serving communities of color?	<i>Lead:</i> Diversity Workgroup <i>Supports:</i> CBP Grants Team, Grant-Making organizations in the partnership	--

#### 3.2 Build relationships with communities of color, low income communities and other underrepresented groups, and incorporate these leaders into decision-making and implementation:

Action	Timeframe (* indicates 2020-2021 priorities)	Measures of Success	Roles	Potential Resources and Tools
3.2.a. Participate in EJ-led gatherings, such as ongoing engagement in the University of Maryland School of Public Health DMV EJ conference (consider becoming a sponsor) to build CBP's professional network and bring discussion about implementation of the Chesapeake Bay Watershed Agreement directly into EJ-led spaces.	<i>Phase 1:</i> Present the tracker from 3.3.a at the DMV EJ conference and ask for feedback on the tracker. Also ask participants what other gatherings CBP should be attending. <i>Ongoing:</i> Continue attending the DMV EJ conference, and expand CBP attendance to other EJ-led gatherings.	What relationships have been built or strengthened this year? What venues were effective for advancing these relationships?	<i>Lead:</i> Goal Implementation Teams and Workgroups, CBP Leadership, partnership organizations <i>Supports:</i> Diversity Workgroup	See tracker in 3.3.a.

3.2.b. Develop a better understanding of environmental justice communities and organizations in the Chesapeake Bay Watershed. This could include conducting stakeholder mapping exercise(s) to become familiar with what organizations are doing environmental justice work and related social justice work in the watershed. This could also include mapping exercises to identify communities of color and low income communities relative to CBP investments.	<p><i>*Phase 1:</i> Conduct research to produce a better understanding of the EJ communities and organizations in the CB Watershed.</p> <p><i>Ongoing:</i> Update this research periodically.</p>	<p>What new organizations and communities have been identified?</p> <p>Has CBP found ways to build relationships with these entities?</p>	<p><i>Lead:</i> Diversity Workgroup</p> <p><i>Supports:</i> CBP GIS Team</p>	Capture learnings from this task in related trackers (e.g., see 3.4.e).
3.2.c. Evaluate the possibility of starting a Community Advisory Board (or similar entity) – composed of compensated environmental justice leaders and representatives from organizations led by people of color and other underrepresented groups – that could serve as (1) a sounding board and resource for development and implementation of the Chesapeake Bay Watershed Agreement, including GIT workplans and grant-making, and (2) a feeder pool for identifying and developing leaders from communities of color, low income communities and other underrepresented groups to serve as representatives on groups throughout the Governance and Management Framework.	<p><i>Phase 1:</i> Using lessons learned from action 3.2.a and 3.2.b, evaluate options for a Community Advisory Board or other related approach and make a recommendation for implementation.</p> <p><i>Ongoing:</i> Pursue the funding and implementation of the recommendation that emerges from year 1.</p>	<p>Has a Community Advisory Board or other mechanism been instituted?</p>	<p><i>Lead:</i> Diversity Workgroup to explore this possibility</p>	<p>Lessons learned from actions 3.2.a and 3.2.b.</p> <p>Evaluate different models and best practices for bringing these leaders into decision-making and develop a set of concrete recommendations about how to approach this effectively within the structure of CBP.</p>
3.2.d. Lift up the work of organizations doing environmental justice and related social justice work in the Chesapeake Bay Watershed. This could take the form of an “innovation conference,” case studies, webinars or other ways of getting the word out.	<p><i>Ongoing:</i> Evaluate what ways these leaders and their work can be lifted up on an annual basis.</p>	<p>Has CBP lifted up the work of these organizations?</p> <p>Are new investments in these leaders or new partnerships taking place as a result?</p>	<p><i>Lead:</i> Diversity Workgroup</p> <p><i>Supports:</i> Partnership organizations, Stewardship Goal Implementation Team</p>	--

### 3.3 Advance diversity, equity and inclusion through GIT workplan development and implementation:

Action	Timeframe (* indicates 2020-2021 priorities)	Measures of Success	Roles	Potential Resources and Tools
3.3.a. Identify specific decision-points and other milestones within the GIT workplans and other governance and management processes supporting the development and implementation of the Chesapeake Bay Watershed Agreement, where communities of color, low income communities and other underrepresented groups can influence the development and implementation of the Chesapeake Bay Watershed Agreement.	<i>*Phase 1:</i> Develop the tracking tool.  <i>Ongoing:</i> Continue to use and refine the tracking tool.	What specific decision-points have been identified?  How feedback can be gathered and incorporated for each decision-point?	<i>Lead:</i> GIT 6, SRS Team  <i>Supports:</i> Diversity Workgroup, Goal Implementation Teams and workgroups	Develop a tracking tool that catalogues relevant decision-points and how feedback is gathered and incorporated for each decision-point. The tracking tool should indicate whether CBP is aiming to improve DEI during the feedback-gathering phase, decision-making phase or both for all decision-points.
3.3.b. Review each GIT workplan and ensure inclusion of considerations for equitable distribution of benefits and improvements and considerations for reduction of disproportionate adverse environmental impacts in communities of color, low income communities and other underrepresented groups.	<i>Phase 1:</i> Develop a template for incorporating these considerations into GIT workplans.  <i>Ongoing:</i> Document changes in outcomes.	Do GIT workplans include these considerations?  Have benefits and improvements been distributed equitably?  Have disproportionate impacts been reduced?	<i>Lead:</i> Goal Implementation Teams and Workgroups  <i>Supports:</i> Diversity Workgroup, SRS Team	Develop a template for incorporating these considerations into GIT workplans.
3.3.c. Ensure implementation partnerships include (1) organizations that are run by and primarily serve communities of color and other underrepresented communities and (2) other organizations that engage these communities. In the near-term, place an emphasis on increasing the former, as the groups are currently underrepresented in CBP's partnerships.	<i>Ongoing:</i> Document types of partnerships for implementing GIT workplans.	Have partnerships with organizations run by and primarily serving communities of color increased?	<i>Lead:</i> GIT 6, Goal Implementation Teams and workgroups  <i>Supports:</i> Diversity Workgroup	--

### 3.4 Advance diversity, equity and inclusion through grantmaking:

Action	Timeframe (* indicates 2020-2021 priorities)	Measures of Success	Roles	Potential Resources and Tools
3.4.a. Annually, review the U.S. EPA CBP Office Grant and Cooperative Agreement Guidance to include DEI and EJ considerations/language.	<i>Ongoing:</i> Implement these criteria, and continue to refine based on lessons learned from grantee feedback and tracking results.	Has the guidance been updated?	<i>Lead:</i> CBP Grants Team  <i>Supports:</i> Diversity Workgroup	Explore partnering with the Chesapeake Bay Funders Network, Chesapeake Bay Trust, and Region 3 and HQ grants offices.

				See criteria proposed in Chapter 5 of <i>DEIJ in Action: A Diversity, Equity, Inclusion and Justice Guide for the Chesapeake Bay Watershed</i> .
3.4.b. Include DEI and EJ criteria in grant targets and evaluation managed directly by CBP.	<p><b>*Phase 1:</b> Develop proposed criteria and gather feedback from EJ leaders during the DMV EJ conference or through another venue.</p> <p><b>Ongoing:</b> Implement these criteria, and continue to refine based on lessons learned from grantee feedback and tracking results.</p>	<p>Have DEI and EJ criteria been incorporated?</p> <p>Have these criteria been vetted with EJ leaders?</p>	<p><b>Lead:</b> CBP Grants Team, GIT Funding Team, Grant-making organizations in the partnership</p> <p><b>Supports:</b> Diversity Workgroup</p>	<p>Explore partnering with the Chesapeake Bay Funders Network, Chesapeake Bay Trust, and Region 3 and HQ grants offices.</p> <p>See criteria proposed in Chapter 5 of <i>DEIJ in Action: A Diversity, Equity, Inclusion and Justice Guide for the Chesapeake Bay Watershed</i>.</p>
3.4.c. Develop grantmaking guidelines that promote non-discriminatory policies among applicant organizations, incentivize applicants to increase DEI in their organizational practices, encourage restoration investments that align with community-identified needs and benefits and encourage capacity building investments in organizations that are run by and primarily serve communities of color and other underrepresented communities.	<p><b>*Phase 1:</b> Develop proposed grantmaking guidelines and gather feedback from EJ leaders during the DMV EJ conference or through another venue.</p> <p><b>Ongoing:</b> Implement these guidelines, and continue to refine based on lessons learned from grantee feedback and tracking results.</p>	<p>Has CBP published these grantmaking guidelines for applicants?</p> <p>What changes have resulted in distribution of resources?</p>	<p><b>Lead:</b> CBP Grants Team, GIT Funding Team, Grant-making organizations in the partnership</p> <p><b>Supports:</b> Diversity Workgroup</p>	See resources and tools in 3.4.a.
3.4.d. Begin increasing and tracking representation of people of color and other underrepresented groups on grant review committees.	<p><b>Phase 1:</b> Gather a baseline for representation on grant review committees, and set goals and strategies for increasing representation.</p> <p><b>Ongoing:</b> Implement strategies and track outcomes.</p>	Is representation increasing on grant review committees?	<p><b>Lead:</b> Grant-making organizations in the partnership, CBP Grants Team</p> <p><b>Supports:</b></p>	Develop a tracking tool.

3.4.e. Host or participate in a gathering of funders to share lessons learned and build CBP's professional network for advancing DEI and EJ through grantmaking.	Ongoing: Host or participate in one such gathering annually.	Is CBP participating in at least one gathering with funders about DEI and EJ annually?	<i>Lead:</i> Grant-making organizations in the partnership <i>Supports:</i> Diversity Workgroup	Chesapeake Bay Funders Network, Chesapeake Bay Trust, and Region 3 and HQ grants offices
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### 3.5 Review and strengthen diversity, equity and inclusion in watershed restoration outreach, materials, activities, and events:

Action	Timeframe (* indicates 2020-2021 priorities)	Measures of Success	Roles	Potential Resources and Tools
3.5.a. Implement existing DWG strategies and actions (as stated in the DWG Management Strategy and workplan) that promote partnerships with organizations that engage people of color, low income communities or other underrepresented groups (e.g., management approaches 1.3, 1.4, 4.2 and 4.3) and track outcomes and lessons learned.	<i>Phase 1:</i> Track outcomes and lessons learned from implementation of current DWG Management Approaches. <i>Ongoing:</i> Identify new approaches as needed and continue tracking.	Are lessons learned being implemented?	<i>Lead:</i> Diversity Workgroup <i>Supports:</i>	Use the system for tracking outcomes and lessons learned from DWG Management Approaches.
3.5.b. Expand DWG strategies and actions that promote partnerships with organizations that are run by and primarily serve communities of color and other underrepresented communities.	<i>* Phase 1:</i> Add DWG Workplan Actions that emphasize partnerships with these organizations via the SRS process. <i>Ongoing:</i> Identify new actions as needed and continue tracking.	Are these kinds of partnerships receiving equal or greater emphasis as the approaches in 3.4.a? Are lessons learned being implemented?	<i>Lead:</i> Diversity Workgroup <i>Supports:</i>	See resources and tools in 3.4.a. Develop and prioritize a list of organizations that meet these criteria, with whom CBP would like to develop initial partnerships.
3.5.c. Develop an evaluation template for GITs to use during the next workplan update cycle to (1) explicitly consider the equitable distribution of benefits and improvements and (2) to explicitly consider the reduction of disproportionate adverse environmental impacts.	<i>Phase 1:</i> Review GIT workplans, develop the guidance or template, and gather feedback from EJ leaders during the DMV EJ conference or through another venue. <i>Ongoing:</i> Implement guidance or template with GITs, and refine as needed.	Is the guidance or template informed by input from communities of color, low income communities and other underrepresented groups? Have GITs evaluated and updated workplans to integrate DEI goals?	<i>Lead:</i> Diversity Workgroup <i>Supports:</i> Facilitator or consultant; SRS Team	Develop guidance or a template to evaluate the eight outcomes selected in 2015.
3.5.d. Conduct a review of communications materials to identify potential areas for improvement, and develop straightforward, accessible DEI communications guidance to	<i>Phase 1:</i> Review communications materials, develop recommendations, and gather feedback from EJ leaders during the DMV	Is the communications guidance being used consistently?	<i>Lead:</i> Communications Team, Communications Workgroup, Web Team	Review and develop guidance on best practices in DEI communications.

ensure future communications materials feel welcoming and are accessible to all.	EJ conference or through another venue. <i>Ongoing:</i> Implement guidance, and refine as needed based on lessons learned.		<i>Supports:</i> Diversity Workgroup	
3.5.e. Develop and distribute straightforward, accessible guidance on distribution of communication materials. This may include a living database of distribution avenues that reach people of color, low income communities and other underrepresented groups. It may also include researching how to better target and grow effectiveness of communications with populations who are untapped or under-tapped but have high levels of support for environmental restoration.	<i>Phase 1:</i> Develop and implement the distribution guidance and a living database of distribution avenues. <i>Ongoing:</i> Refine as needed based on lessons learned.	Is the distribution guidance being used consistently? Is the living database being updated regularly?	<i>Lead:</i> Communications Team, Communications Workgroup. Web Team <i>Supports:</i> Diversity Workgroup	Develop distribution guidance and a living database of relevant distribution avenues.
3.5.f. Develop straightforward, accessible guidance on promoting DEI in contracting and consulting.	<i>Phase 1:</i> Develop and implement guidance. <i>Ongoing:</i> Refine as needed based on lessons learned.	Is CBP directing more resources towards minority-owned businesses?	<i>Lead:</i> Diversity Workgroup <i>Supports:</i> Organizations in the Partnership; CBT Grants Team	Review and develop guidance for promoting DEI in contracting and consulting.
3.5.g. Review these preliminary recommendations with communities of color, low income communities and other underrepresented groups to ensure that the recommendations are well-informed prior to implementation.	<i>Phase 1:</i> Convene a group to inform approach for preliminary review and ongoing check ins. <i>Ongoing:</i> Convene for further review and refinements on an as needed basis.	Do recommendations reflect guidance of communities of color, low income communities and other underrepresented groups?	<i>Lead:</i> Diversity Workgroup <i>Supports:</i> Organizations in the Partnership; potential Community Advisory Committee	--

#### 4. Advancing DEI Performance of CBP Partners

To advance DEI performance of partners:

Action	Timeframe (* indicates 2020-2021 priorities)	Measures of Success	Roles	Potential Resources and Tools
4.1. Increase access to DEI training and capacity building. Prominently advertise, incentivize and recruit for the 2019-2020 trainings and distribute tools developed under this grant to CBP Partners. Request feedback on the training and tools and additional trainings and tools could be valuable for them and for	<i>*Phase 1:</i> Include CBP partners in the final webinar summarizing project outcomes, tools and next steps. <i>Ongoing:</i> Promote DEI and EJ training	How many CBP partners attend the Year 1 training? How many CBP partners take advantage of future trainings	<i>Lead:</i> Diversity Workgroup <i>Supports:</i> Consultants, partnership organizations, Leadership;	--

their colleagues. Encourage partner organizations to offer DEI trainings to their board, staff and volunteers.	opportunities offered by CBP and by others.	through CBP connections?	Communications Workgroup	
4.2. Once CBP's DEI statement or policy is developed, share this succinct statement with CPB partners. Consider offering a webinar or pursuing other opportunities for discussion and dissemination of both the CBP DEI statement and the lessons learned in developing and adopting the statement. (For example, the annual Chesapeake Bay Watershed Forum may be a good venue to share the CBP DEI statement and goals with a broader watershed-wide audience, as well as the annual Choose Clean Water Coalition conference.)	<i>Phase 1:</i> Share DEI statement with CBP partners and offer a forum for discussion of the statement, lessons learned, and how other organizations can develop their own. <i>Ongoing:</i> Offer support to CBP partners seeking to develop their own statement, as needed.	How many CBP Partners have developed their own DEI Statements?	<i>Lead:</i> Diversity Workgroup <i>Supports:</i> Management Board, CBP Leadership, Consultant	Potentially develop a webinar, presentation or discussion guide to help foster discussion among CBP partners.
4.3. Build off the dissemination of the DEI statement by offering a follow up webinar for CBP Partners that takes a deeper dive into DEI plans, tracking and assessment.	<i>Phase 1:</i> Share DEI statement with CBP partners and offer a forum for discussion of the statement, lessons learned, and how other organizations can develop their own. <i>Ongoing:</i> Offer support to CBP partners seeking to develop their own statement, as needed.	How many CBP partners have developed other DEI tools, such as a DEI assessment, DEI plan, or tracking tools?	<i>Lead:</i> Diversity Workgroup <i>Supports:</i> Consultant, Leadership	Potentially develop a follow up webinar, presentation or discussion guide, which builds off of the resource created in 4.2 to help foster discussion among CBP partners.
4.4 Develop and distribute straightforward, accessible guidance on including DEI and EJ criteria in grant targets and evaluation to CBP members.	<i>Phase 1:</i> Develop and distribute guidance based on lessons learned from 3.3.a. <i>Ongoing:</i> Continue distributing updated guidance as needed. Track how many CBP members are using the guidance.	Has guidance been created and distributed? How many CBP members have implemented the guidance?	<i>Lead:</i> Diversity Workgroup <i>Supports:</i> CBP Grants Team, GIT Funding Team, Grant-making organizations in the partnership	See resources and tools in 3.4.a.
4.5. Develop and share the DEI communication and distribution guidance broadly among CBP Partners.	<i>Phase 1:</i> Disseminate the guidance to CBP partners. <i>Ongoing:</i> Ask CBP partners to share how they are using the resources, including lessons learned, and update the resources as needed.	How many CBP partners implemented best practices shared in the resources?	<i>Lead:</i> Communications Team Diversity Workgroup, Communications Workgroup <i>Supports:</i> Other Goal Implementation Teams and Workgroups,	See the resources developed in 3.4.d and 3.4.e.

<p>4.6. Develop tracking and reporting guidance to share broadly among CBP Partners. Where feasible, point CBP Partners to tools that are already established in the field. Develop an biennial report to capture CBP Partner tracking outcomes to help build momentum and accountability across the partnership – this report could start by tracking diversity of board, management and staff, and then add additional measures as CBP roles out best practices, tools and resources to its partners.</p>	<p><i>Phase 1:</i> Develop the tracking and reporting guidance. <i>Ongoing:</i> Ask CBP partners to share how they are using the resources, including lessons learned, and update the resources as needed. <i>Ongoing:</i> Release an annual report summarizing CBP and partner outcomes.</p>	<p>How many CBP partners implemented best practices shared in the resources?</p>	<p><i>Lead:</i> Diversity Workgroup <i>Supports:</i> Consultant</p>	<p>Gather all tracking and reporting guidance materials developed and summarize in a single resource.</p>
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## Chapter 5: Looking Forward

This report provides a DEI Strategy for the Chesapeake Bay Program that will help staff, volunteers, decision-makers and partners leverage strategies for diversity, equity and inclusion as well as environmental justice. Like the Chesapeake Bay itself, successful DEI and EJ efforts require a healthy ecosystem in order to thrive. This DEI Strategy emphasizes the internal, cultural and policy changes needed to create a healthy, supportive organizational ecosystem where DEI and EJ goals can produce lasting results that advance the restoration of the Chesapeake Bay Watershed.

Priority focus areas for 2020-2021 emphasize actions to strengthen CBP's foundation for advancing DEI. These include:

- A significant emphasis on strengthening CBP's authorizing environment through developing a DEI Statement and updating various authorizing documents to reflect advances in CBP's understanding of DEI.
- Increase diversity and inclusion for staff, appointees, and volunteer bodies, with a focus on learning from people of color about their experience of the culture within CBP.
- Build a common understanding of DEI and expanded capacity for DEI through trainings and identifying funding for staff and leadership to participate in DEI-related conferences and network building events.
- Institutionalize efforts to advance DEI internally by disseminating the tools and resources developed under this phase of DEI work and budgeting for additional actions in 2021.
- Distinguishing between (1) organizations that are run by and primarily serve communities of color and other underrepresented communities and (2) other organizations that engage these communities.
- Build relationships with communities of color, low income communities and other underrepresented groups with a focus on listening through participation in EJ-led gatherings and developing a better understanding of who is already operating in this space.
- Advance diversity, equity and inclusion through GIT workplan development and implementation with a focus on incorporating leaders from communities of color and low income communities into decision-making and implementation.
- Advance diversity, equity and inclusion through grantmaking with a focus on updating DEI and EJ criteria in grant targets and evaluation.
- Advance DEI Performance of CBP Partners with a focus on including them in the 2020 trainings and disseminating tools and resources to them as they are developed by CBP.

By embracing restoration from the inside out, CBP will become able to tap into the persistence, wisdom, creativity, motivations, and political will of the diverse people who live in and contribute to the many ecosystems that make up the Chesapeake Bay Watershed. If done well, these strategies will strengthen CBP's ability to achieve its mission and carry out its responsibilities effectively over the long-term. By embracing restoration from the inside out, CBP will be able to more effectively build a diverse and inclusive coalition to implement the Chesapeake Bay Watershed Agreement to restore the Bay, its tributaries and the surrounding ecosystems.

## Appendix A: DEI Assessment Survey Results

The Chesapeake Bay Program conducted a Diversity, Equity and Inclusion (DEI) Readiness Assessment to explore perceptions about DEI within CBP. Identifying information was not collected with the survey to encourage respondents to be open and honest with their answers.

For the purposes of this survey, respondents were given the following definitions, which were adapted from or developed by the D5 Coalition:

- *Diversity*: The demographic mix of a specific collection of people, taking into account elements of human difference. For example: racial and ethnic groups, income, spectrum of built environment settings (rural to urban), faith communities, LGBTQ+ populations, people with disabilities, gender, relationship to the natural environment.
- *Equity*: Improving equity is to promote justice, impartiality and fairness within the procedures, processes, and distribution of resources by institutions or systems. Tackling equity issues requires an understanding of the underlying or root causes of disparities within our society.
- *Inclusion*: Refers to the degree to which diverse individuals are able to participate fully in the decision-making processes within an organization or group. While a truly “inclusive” group is necessarily diverse, a “diverse” group may or may not be “inclusive.”

The survey had 60 respondents. 59 respondents completed the full survey. This survey results summary does not include the free responses for privacy reasons.

### 1. How satisfied are you with CBP’s current level of diversity among CBP staff?

	I don’t know	Very dissatisfied or Dissatisfied	Neutral	Satisfied or Very satisfied
Gender	3%	5%	24%	68%
Educational attainment	12%	5%	28%	55%
Age	5%	14%	27%	54%
Geographic diversity (perspectives representing urban, suburban and rural backgrounds)	33%	13%	27%	27%
Socioeconomic status	37%	17%	37%	10%
Race/ethnicity	3%	78%	13%	5%
Gender identity/Sexual orientation	47%	15%	34%	3%

#### Observations:

- 54% or more of the respondents are satisfied or very satisfied with the gender, educational attainment and age diversity among CBP staff.
- Between 24-37% of respondents are neutral on all measures of diversity except for race/ethnicity, where the percentage of neutral respondents drops to 13%.
- 78% of respondents are dissatisfied or very dissatisfied with the racial/ethnic diversity of CBP staff.
- 60-81% of respondents are either neutral or don’t know about the diversity of CBP staff relative to geographic diversity, socioeconomic status, and gender identity/sexual orientation.

## 2. To what extent do you believe diversity, equity and inclusion practices will benefit the CBP in the following areas?

	I don't know	Strongly disagree or Disagree	Neutral	Agree or Strongly agree
Better serve the public	0%	2%	2%	97%
Broaden our partnerships	0%	2%	3%	95%
Ability to advance our mission	2%	2%	5%	92%
Encourage diversity, equity and inclusion in decision-making	2%	2%	7%	90%
Expand our supporters	0%	2%	10%	88%
Improve hiring and retention of diverse staff	2%	2%	8%	88%
Improve the quality of my work life	3%	3%	25%	68%

### Observations:

- 88-97% of respondents believe that DEI practices will benefit CBP on all measures, except for quality of work life where the percentage drops to 68% and 25% of respondents selected a neutral response.

## 3. What is your personal comfort level in engaging with people from other cultures or backgrounds? (check all that apply)

73%	Ready to dive right in
32%	Prefer to observe first to know what I'm getting into
32%	Uncomfortable or worried that I may say or do something wrong
10%	Fear of rejection or an angry response
10%	Worry that that person may not care about my message, program, etc.
6%	Other (describe)
0%	Fear for personal safety

### Observations:

- 73% of respondents feel "ready to dive right in."
- 32% of respondents prefer to observe first or feel uncomfortable or worried about making a mis-step or saying something wrong.
- 10% of respondents experience fear around the responses they may receive and/or worry about whether their audience will care about their message or program.
- No respondents indicated a fear for personal safety.

## 4. To what extent do you agree with each of the following statements?

	I don't know	Strongly disagree or Disagree	Neutral	Agree or Strongly agree
CBP actively demonstrates a commitment to inclusion.	7%	35%	23%	35%
CBP actively demonstrates a commitment to diversity.	8%	35%	25%	32%
CBP actively demonstrates a commitment to equity.	10%	32%	33%	25%

### Observations:

- Responses are relatively consistent across all three areas.
- 32-35% of respondents agree or strongly agree that CBP actively demonstrates a commitment to inclusion and diversity, while the percentage drops to 25% for equity.
- 32-35% of respondents disagree or strongly disagree that CBP actively demonstrates a commitment to these areas.

**5. To what extent do you agree with the following statements about hiring, promotion and tenure at CBP?**

	I don't know	Strongly disagree or Disagree	Neutral	Agree or Strongly agree
CBP encourages partner agencies to promote DEI in hiring, promotion and tenure policies, practices and procedures consistent with fair hiring practices.	32%	22%	20%	25%
CBP encourages partner agencies to seek opportunities to provide professional development, promote and retain people of color and other underrepresented groups across management, CBP staff and intern positions.	32%	20%	25%	22%
CBP encourages partner agencies to include people of color and other underrepresented groups in hiring and promotion committees.	37%	22%	24%	17%
CBP encourages partner agencies to conduct proactive outreach and recruitment to increase representation of people of color and other underrepresented groups in management, CBP staff and intern positions.	39%	24%	20%	17%

*Observations:*

- 32-39% of respondents did not know how to answer for these statements about hiring, promotion and tenure at CBP.
- Respondents who did feel capable of answering were fairly evenly split between disagreement, neutrality and agreement; however, only 17-25% of respondents agreed or strongly agreed that CBP is encouraging partners in these areas.

**6. To what extent do you agree with the following statements about CBP's appointee and volunteer bodies?**

	I don't know	Strongly disagree or Disagree	Neutral	Agree or Strongly agree
CBP conducts proactive outreach and recruitment to increase representation of people of color and other underrepresented groups on the Management Board, Advisory Committees, Goal Implementation Teams and Workgroups.	32%	46%	15%	7%
CBP seeks opportunities to support and retain people of color and other underrepresented groups on the Management Board, Advisory Committees, Goal Implementation Teams and Workgroups.	36%	37%	20%	7%

*Observations:*

- 32-36% of respondents did not know how to answer for these statements about CBP's appointee and volunteer bodies.
- Only 7% of respondents agreed or strongly agreed, while 37-46% of respondents disagreed or strongly disagreed.

## 7. To what extent do you agree with the following statements about CBP's internal culture?

	I don't know	Strongly disagree or Disagree	Neutral	Agree or Strongly agree
CBP establishes a common understanding of the meaning of diversity, equity and inclusion as it relates to the mission of the organization.	17%	36%	25%	22%
CBP ensures CBP staff and appointee/volunteer bodies have a mechanism for raising and addressing DEI issues within the organization.	41%	31%	17%	12%
CBP ensures board, management and CBP staff have (or know how to access) the skills and tools needed to advance DEI within the work of the organization.	27%	47%	15%	10%
CBP regularly includes DEI considerations in decision-making and daily operations of the board, CBP staff and appointee/volunteer bodies.	34%	37%	20%	8%
CBP conducts CBP staff and Management Board training on DEI, racial equity and environmental justice issues.	32%	49%	10%	8%

### Observations:

- 22% of respondents agreed or strongly agreed that CBP establishes a common understanding of the meaning of DEI as it relates to CBP's mission.
- 31-37% of respondents disagreed or strongly disagreed that CBP:
  - establishes a common understanding of the meaning of diversity, equity and inclusion as it relates to the mission of the organization.
  - ensures CBP staff and appointee/volunteer bodies have a mechanism for raising and addressing DEI issues within the organization.
  - regularly includes DEI considerations in decision-making and daily operations of the board, CBP staff and appointee/volunteer bodies.
- 47-49% of respondents disagreed or strongly disagreed that CBP:
  - ensures board, management and CBP staff have (or know how to access) the skills and tools needed to advance DEI within the work of the organization.
  - conducts CBP staff and Management Board training on DEI, racial equity and environmental justice issues.

## 8. When you consider the GIT(s) you are engaged with, to what extent do you agree with the following statements about GIT workplans? (GITs include: Sustainable Fisheries, Water Quality, Fostering Chesapeake Bay Stewardship, Habitat, Maintain Healthy Watersheds, Enhance Partnering, and Leadership and Management.)

	I don't know	Strongly disagree or Disagree	Neutral	Agree or Strongly agree
Each GIT workplan explicitly considers how to reduce disproportionate adverse environmental impact in communities of color, low income communities, and other underrepresented groups.	37%	44%	12%	7%
Each GIT workplan engages communities of color, low income communities, and other underrepresented groups in the development and implementation of the workplan.	36%	51%	8%	5%
Each GIT workplan explicitly considers how to distribute benefits and improvements more equitably to communities of color, low income communities, and other underrepresented groups.	37%	46%	12%	5%

### Observations:

- 5-7% of respondents agreed or strongly agreed with these statements about GIT Workplans, while 44-51% of respondents disagreed or strongly disagreed.
- 36-37% of respondents did not know how to answer.

- Free responses included a wide range of perspectives on whether GIT workplans address DEI (full free responses can be found starting on page 9):
  - GIT workplans don't generally address DEI, but should more broadly,
  - the Diversity workgroup is primarily where DEI is and should be advanced,
  - DEI is not relevant to most GIT workplans,
  - the jurisdictions and partners are more capable of advancing DEI than the GITs, and
  - the GITs do not have capacity to address DEI because they are already struggling to meet basic operational needs.
- One respondent reported concerns about both institutional and direct bias against women, people of color and LGBTQ+ people.

#### 9. To what extent do you agree with the following statements about CBP communications?

	I don't know	Strongly disagree or Disagree	Neutral	Agree or Strongly agree
Communication materials are culturally accessible, promote DEI goals, and reflect people of color and other underrepresented groups.	20%	19%	32%	29%
Communication distribution includes avenues designed for people of color, low income communities, and other underrepresented groups.	32%	24%	25%	19%

##### Observations:

- 29% of respondents believe that communications materials are culturally accessible, promote DEI goals, and reflect people of color and other underrepresented groups.
- 19% of respondents believe that communication distribution includes avenues designed for people of color, low income communities, and other underrepresented groups.

#### 10. To what extent do you agree with the following statements about CBP's partnerships?

	I don't know	Strongly disagree or Disagree	Neutral	Agree or Strongly agree
CBP partners with organizations that engage people of color, low income communities, or other underrepresented groups to implement the Chesapeake Bay Watershed Agreement.	24%	29%	14%	34%
CBP partners with organizations led or staffed by people of color or other underrepresented groups to implement the Chesapeake Bay Watershed Agreement.	27%	29%	19%	25%
CBP encourages its partners to consider DEI in messaging, materials and distribution avenues.	46%	29%	14%	12%
CBP encourages its partners to adopt and disseminate a clear DEI statement or policy.	46%	29%	15%	10%
CBP encourages its partners to adopt an organizational DEI Plan and assess progress on the plan annually.	54%	29%	10%	7%
CBP encourages its partners to offer DEI training to their board, staff and volunteers.	54%	29%	10%	7%

##### Observations:

- 29% of respondents disagree or strongly disagree with all of these statements.
- 34% of respondents agree or strongly agree that CBP partners with organizations that engage people of color, low income communities, or other underrepresented groups to implement the Chesapeake Bay Watershed Agreement.
- 25% of respondents agree or strongly agree that CBP partners with organizations led or staffed by people of color or other underrepresented groups to implement the Chesapeake Bay Watershed Agreement.

## Appendix B: Focus Group Agendas

### CBP's Internal Culture around DEI a facilitated discussion with program staff

#### Purpose:

- Gather staff perceptions of the internal culture around diversity, equity and inclusion (DEI) at CBP.
- Identify how staff think CBP could continue to grow and strengthen its practice of DEI.

#### Agenda

##### 9:00 Welcoming Remarks (CBP Project Team member)

- Share the purpose of the DEI Readiness Assessment and how CBP will use the information gathered through this discussion as one component of the assessment.
- Introduce Skeo's role in conducting the assessment and facilitating this conversation.
- Set the stage for an open and honest conversation among staff via ground rules.

##### 9:10 Meeting Purpose and Introductions (Vernice Miller-Travis, Skeo)

- Review meeting purpose and agenda
- Brief introductions – name, role at CBP, how long you have worked with CBP

##### 9:20 DEI Project Status Update (Vernice Miller-Travis, Skeo)

- Overview of project status and timeline going forward
- Review themes from DEI interviews and survey, as appropriate.
- Q & A

##### 9:30 What is your Internal Culture around DEI? (Vernice Miller-Travis, Skeo)

- Do you see DEI as integral to achieving the mission of CBP? Why or why not?
- To what extent do you and your colleagues include DEI considerations in daily operations and decision-making?
- Is it easy or difficult to raise and address DEI issues at work? Why?
- Does the CBP board, management and staff have the skills/tools needed to advance DEI?
  - What training and/or resources have staff received on DEI and racial equity issues?
  - What additional tools or skills do you think they need?

##### 10:30 Break

##### 10:45 Where might CBP go from here to advance DEI in its internal culture?

- In what areas of CBP's internal culture would you like to see more focus on DEI?
- What barriers to continued growth in DEI stand out to you?
- What opportunities for continued growth in DEI stand out to you?
- What resources do staff need to support continued growth in DEI?

##### 11:40 Discussion Recap (Vernice Miller-Travis)

- Discussion summary.
- Is there anything else you would add to the insights from our discussion today?
- Were there any "Aha Moments" for you during today's discussion?

##### 11:55 Closing Remarks (CBP Project Team Representative)

- Appreciations.
- Share next steps for the DEI Readiness Assessment.

##### 12:00 Adjourn

**Incorporating DEI into Decision-Making at CBP**  
**a facilitated discussion with staff, Management Board and GIT members**

**Purpose:**

- Explore CBP's understanding of diversity vs. equity vs. inclusion.
- Gather ideas and considerations for integrating DEI into decision-making and thought leadership in a science-based organization.

**Agenda**

**1:30 Welcoming Remarks (CBP Project Team member)**

- Share the purpose of the DEI Readiness Assessment and how CBP will use the information gathered through this discussion as one component of the assessment.
- Introduce Skeo's role in conducting the assessment and facilitating this conversation.
- Set the stage for an open and honest conversation via ground rules.

**1:35 Meeting Purpose and Introductions (Vernice Miller-Travis, Skeo)**

- Review meeting purpose and agenda.
- Brief introductions – name, role at CBP, how long you have been at CBP.
- Review summary of staff conversation and DEI themes from work to date.

**1:45 Understanding Diversity, Equity and Inclusion (Vernice Miller-Travis)**

- Flip-charted round robin: What does DEI mean to you?
- Review definitions of "diversity," "equity" and "inclusion"
  - Is there anything that surprised you in these definitions?
  - As you consider the differences between diversity, equity and inclusion, how do you envision CBP might change as you integrate DEI across the organization and into your work?
- What training and/or resources have you received on various aspects of DEI or racial equity issues?
- Does CBP's board, management and staff have the skills and tools needed to advance all aspects of DEI throughout the organization? What skills or tools are needed to be more effective?

**2:45 Break**

**3:00 Integrating DEI into Decision-Making at CBP (Vernice Miller-Travis)**

- Currently, in what ways is DEI formally or informally integrated into decision-making?
- What would it mean for a science-based organization to include DEI criteria in decision-making?
- What types of decisions have more opportunity to incorporate DEI considerations?
- What are some first steps CBP can take to formalize DEI considerations in decision-making? What are some long-term steps?
- (If time) What are the potential risks of moving in this direction with DEI? Potential benefits?
- Any additional considerations that should be noted?

**4:00 Discussion Recap (Vernice Miller-Travis)**

- Discussion summary
- Is there anything else you would add to the insights from our discussion today?
- Were there any "Aha Moments" for you during today's discussion?

**4:20 Closing Remarks (CBP Project Team member)**

- Appreciations.
- Share next steps for the DEI Readiness Assessment.

**4:30 Adjourn (Vernice Miller Travis)**



## Appendix C: DEI Readiness Assessment Findings and Recommendations

Table 5 captures the full findings and recommendations from the DEI Readiness Assessment for CBP.

Table 5. DEI Readiness Assessment Findings and Recommendations

Objectives and Actions	Status <sup>13</sup>			Assessment <sup>14</sup>			Findings and Recommendations
	N	P	Y	1	2	3	
Objective 1. Create an Authorizing Environment							
1.1 Include specific DEI and environmental justice (EJ) goals in the Chesapeake Bay Watershed Agreement.		✓		✓			<i>Findings:</i> Strong goals related to diversity of staff and of “minority stakeholder groups”. Integrating environmental justice considerations is a principle of the agreement. However, there are no goals explicitly related to equity or inclusion. Inclusion may be implied in the diversity goals, but the lack of explicit discussion means that some readers may assume if diversity goals are achieved, inclusion has also been achieved. Explicit discussion would make clear the distinction between the two and the need to achieve both independent of the other.  <i>Recommendation:</i> Ensure equity and inclusion are explicitly articulated in overarching goals of the Chesapeake Bay Watershed Agreement.
1.2 Adopt and disseminate a clear DEI statement or policy.	✓			✓			<i>Findings:</i> While statements related to DEI and EJ are incorporated across a number of documents, there is no one central statement or policy that succinctly and clearly captures the connection between DEI, EJ and CBP’s mission.  <i>Recommendation:</i> Develop a succinct DEI statement that defines relevant terminology and that clearly captures the connection between DEI, EJ and CBP’s mission.
1.3 Adopt an organizational DEI Plan.			✓	✓			<i>Findings:</i> The Diversity Outcome Management Strategy and DWG Outcome Logic Table and Workplan provide a strong starting point; however, they could be significantly strengthened in ways noted throughout this assessment. The Governance and Management Framework does not currently address DEI or EJ.  <i>Recommendation:</i> Review the recommendations in this assessment and incorporate priority changes throughout both the Diversity Outcome Management Strategy and the DWG Outcome Logic Table and Workplan.  <i>Recommendation:</i> Incorporate DEI and EJ into the Governance and Management Framework by setting explicit diversity goals for each group in the organizational structure in their “Leadership and Membership” sections and adding language describing the role and impact of DEI and EJ considerations in the “Process for Decision-Making” section. See also deeper discussion in the summary of the Incorporating DEI into Decision-Making at CBP focus group.
1.4 Track, analyze and report on the measures of the DEI plan.		✓			✓		<i>Findings:</i> The DWG has created a workgroup to monitor and assess CBP’s progress in implementing the Diversity Outcome Management Strategy.  <i>Recommendation:</i> As priority changes are incorporated throughout the DEI Plan documents listed in Objective 1.3, ensure that related tracking

<sup>13</sup> Status (have the actions been taken?): N – No; P – Partially; Y – Yes.

<sup>14</sup> Assessment (what is the outcome of the actions?): 1 – Not yet meeting goals; 2 – Achieving goals; 3 – Exceeding goals.

Objectives and Actions	Status <sup>13</sup>			Assessment <sup>14</sup>			Findings and Recommendations
	N	P	Y	1	2	3	
							measures are being developed by the workgroup and annual reporting is taking place.
1.5 Include DEI measures in the performance goals for senior and mid-level managers.	✓			✓			<i>Findings:</i> No data provided to demonstrate planning or implementation. <i>Recommendation:</i> Develop and add DEI measures to performance goals for senior and mid-level managers.
1.6 Create a Management Board-level Diversity or DEI Committee or equivalent.	✓			✓			<i>Findings:</i> No data provided to demonstrate planning or implementation. <i>Recommendation:</i> Create a Management Board-level Diversity or DEI Committee or equivalent.
<b>Objective 2. Increase DEI in Hiring, Promotion and Tenure within CBPO Staff<sup>15</sup></b>							
2.1 Encourage partner entities to promote DEI in hiring, promotion and tenure policies, practices and procedures consistent with fair hiring practices.		✓		✓			<i>Findings:</i> Some actions and goals identified, including a goal to grow racial and ethnic diversity from 13% to 25% (including 15% of leadership). No data provided on implementation. Only 25% of survey respondents agree or strongly agree that CBP is achieving outcomes in this area. Only 5% of survey respondents are satisfied or very satisfied with CBP's current level of racial/ethnic diversity among CBP staff. <i>Recommendation:</i> Document implementation efforts to promote DEI in hiring, promotion and tenure policies, and evaluate what efforts are helping to move the needle on an annual basis. The federal hiring process includes some constraints that may make this goal difficult to achieve; therefore, close monitoring and yearly adjustments to amplify the strategies that are working is recommended.
2.2 Encourage partner entities to include people of color and other underrepresented groups in hiring and promotion committees.		✓		✓			<i>Findings:</i> No data provided to demonstrate planning or implementation. Only 17% of survey respondents agree or strongly agree that CBP is achieving outcomes in this area. <i>Recommendation:</i> Re-structure hiring and promotion committees as needed to include people of color and other underrepresented groups where feasible.
2.3 Encourage partner entities to conduct proactive outreach and recruitment to increase representation of people of color and other underrepresented groups in management, CBP staff and intern positions.		✓		✓			<i>Findings:</i> Some actions and goals identified, primarily regarding the pipeline for interns and staff. No data provided to demonstrate planning regarding management positions. No data provided to demonstrate implementation. Only 17% of survey respondents agree or strongly agree that CBP is achieving outcomes in this area. <i>Recommendation:</i> Document implementation efforts to increase representation of people of color and other underrepresented groups, and evaluate what efforts are helping to move the needle on an annual basis. The federal hiring and promotion process include some constraints that may make this goal difficult to achieve; therefore, close monitoring and yearly adjustments to amplify the strategies that are working is recommended. (CBP may wish to review the Office of Water Special Emphasis Advisory Council (SEPAC) Diversity Dashboard for resources regarding pipeline diversity and other relevant data and information.)

<sup>15</sup> CBPO Staff include all employees who work at the CBP offices in Annapolis, Maryland, and serve in a variety of roles and capacities to advance and coordinate the work of the larger partnership. They include employees of federal agencies and contractors, non-profit organizations and academic institutions. Specific federal agencies include: the Environmental Protection Agency, National Parks System, Forest Service, Geological Survey and National Oceanic and Atmospheric Administration. See <https://www.chesapeakebay.net/who/staff>.

Objectives and Actions	Status <sup>13</sup>			Assessment <sup>14</sup>			Findings and Recommendations
	N	P	Y	1	2	3	
2.4 Encourage partner entities to seek opportunities to provide professional development, promote and retain people of color and other underrepresented groups across management, CBP staff and intern positions.		✓		✓			<p><i>Findings:</i> No data provided to demonstrate planning or implementation. Only 22% of survey respondents agree or strongly agree that CBP is achieving outcomes in this area.</p> <p><i>Recommendation:</i> Track number and percent of people of color and other underrepresented groups in each of these groups over time.</p> <p><i>Recommendation:</i> Ask staff of color and other underrepresented groups (in a relaxed environment) what is working well for them in the current work environment and what additional resources or supports might be needed to increase equity and inclusion in the workplace, provide relevant professional development, and focus on increasing promotion and retention rates. Prioritize and implement recommendations identified through this process.</p>
<b>Objective 3. Increase DEI in Appointee and Volunteer Bodies</b>							
3.1 Conduct proactive outreach and recruitment to increase representation of people of color and other underrepresented groups on the Management Board, Advisory Committees, Goal Implementation Teams and Workgroups.		✓		✓			<p><i>Findings:</i> DWG Outcome Logic Table and Workplan outlines some actions to support this; however, only 7% of survey respondents agreed or strongly agreed that CBP is achieving outcomes.</p> <p><i>Recommendation:</i> Per recommendation in Objective 1.3, incorporate DEI and EJ into the Governance and Management Framework by setting explicit diversity goals for each group in the organizational structure in their “Leadership and Membership” sections.</p> <p><i>Recommendation:</i> Document implementation efforts at increasing representation of people of color and other underrepresented groups on the Management Board, Advisory Committees, Goal Implementation Teams and Workgroups. Evaluate what efforts are helping to move the needle on an annual basis. Building momentum to achieve this goal may be a heavy lift; therefore, close monitoring and yearly adjustments to amplify the strategies that are working is recommended.</p>
3.2 Seek opportunities to support and retain people of color and other underrepresented groups on the Management Board, Advisory Committees, Goal Implementation Teams and Workgroups.	✓			✓			<p><i>Findings:</i> No data provided to demonstrate planning or implementation. Only 7% of survey respondents agreed or strongly agreed that CBP is achieving outcomes.</p> <p><i>Recommendation:</i> Per recommendation in Objective 1.3, incorporate DEI and EJ into the Governance and Management Framework by setting explicit diversity goals for each group in the organizational structure in their “Leadership and Membership” sections.</p> <p><i>Recommendation:</i> Track number and percent of people of color and other underrepresented groups in each of these groups over time.</p> <p><i>Recommendation:</i> Ask people of color and other underrepresented groups what is working well for them (in a relaxed environment) in the current environment and what additional resources or supports might be needed to increase equity and inclusion within their group and increase retention rates. Prioritize and implement recommendations identified through this process.</p>
<b>Objective 4. Increase DEI in Internal Culture and Training</b>							
4.1 Provide CBP staff and Management Board training and tools on DEI, racial equity and		✓			✓ <sup>16</sup>		<p><i>Findings:</i> Management Approach 2.6 in the DWG Outcome Logic Table and Workplan sets performance targets for providing training resources to increase equity and inclusion in hiring practices at the federal and state levels. The grant under which the DEI Readiness Assessment is</p>

<sup>16</sup> This score is provisionally given, because a significant number of trainings are forthcoming in 2019-2020.

Objectives and Actions	Status <sup>13</sup>			Assessment <sup>14</sup>			Findings and Recommendations
	N	P	Y	1	2	3	
<i>environmental justice issues.</i>							<p>being conducted will provide training and tools on DEI, racial equity and EJ issues in Fall 2019. However, only 8% of survey respondents agreed or strongly agreed that CPB conducts these trainings.</p> <p>Looking ahead, CBP's proposal for a GIT-funded project (\$15,000) to support additional trainings has been accepted and will be put out as an RFP.</p> <p><i>Recommendation:</i> Ensure that the Fall 2019 trainings are prominently advertised and well attended.</p> <p><i>Recommendation:</i> Develop a list of additional trainings CBP can provide. Ask Fall 2019 training participants to evaluate the training(s) they attend and provide feedback on what additional training could be valuable for them and for their colleagues. See also recommendations from CBP staff in the summary of the CBP's Internal Culture around DEI focus group.</p>
<i>4.2 Establish common understanding of the meaning of diversity, equity and inclusion as it relates to the mission of the organization.</i>		✓		✓			<p><i>Findings:</i> The Diversity Outcome Management Strategy connects diversity to the Citizen Stewardship Goal. However, there is no language about equity, inclusion or environmental justice, and only 22% of survey respondents agreed or strongly agreed that CBP is achieving this metric.</p> <p><i>Recommendation:</i> Use the Fall 2019 trainings to build a common understanding of the meaning of diversity, equity and inclusion and connect these topics to CBP's mission. Discussion during these trainings may inform development of the DEI statement recommended below.</p> <p><i>Recommendation:</i> Per recommendation in Objective 1.2, develop a succinct DEI statement that defines relevant terminology and that clearly captures the connection between DEI, EJ and CBP's mission.</p> <p><i>Recommendation:</i> Per recommendations in Objective 1.3, incorporate diversity goals and discussion of DEI and EJ decision-making considerations into the Governance and Management Framework.</p> <p><i>Recommendation:</i> To continue growing common understanding, build discussion time regarding the newly adopted DEI statement and the changes to the Governance and Management Framework into the agendas of each group identified in the Governance and Management Framework document.</p>
<i>4.3 Regularly include DEI considerations in decision-making and daily operations of the board, CBP staff and appointee/volunteer bodies.</i>	✓			✓			<p><i>Findings:</i> Despite the activity and efforts of the DWG, there is little evidence for institutionalized approaches to including DEI considerations in decision-making. The Governance and Management Framework does not address DEI in its description of decision-making processes and procedures. Furthermore, only 8% of survey respondents agree or strongly agree that CBP is achieving this metric.</p> <p><i>Recommendation:</i> Incorporate DEI and EJ into the Governance and Management Framework by incorporating discussion of DEI and EJ into the "Process for Decision-Making" section.</p> <p><i>Recommendation:</i> Build mechanism(s) for raising and addressing DEI issues into the Governance and Management Framework.</p> <p><i>Recommendation:</i> Document implementation efforts by each group mentioned in the Governance and Management Framework and evaluate what efforts are helping to move the needle on an annual basis. Building momentum to achieve this goal may be a heavy lift to implement a significant cultural shift across an organization where decision-making has historically been focused on environmental science</p>

Objectives and Actions	Status <sup>13</sup>			Assessment <sup>14</sup>			Findings and Recommendations
	N	P	Y	1	2	3	
							metrics; therefore, close monitoring and yearly adjustments to amplify the strategies that are working is recommended.
4.4 Ensure CBP staff and appointee/volunteer bodies have a mechanism for raising and addressing DEI issues within the organization.	✓			✓			<p><i>Findings:</i> No data provided to demonstrate planning or implementation. Only 12% of survey respondents agree or strongly agree that CBP is achieving this metric.</p> <p><i>Recommendation:</i> Per recommendation in Objective 4.3, build mechanism(s) for raising and addressing DEI issues into the Governance and Management Framework.</p> <p><i>Recommendation:</i> Document implementation efforts at raising and addressing DEI issues by each group mentioned in the Governance and Management Framework and evaluate what efforts are helping to move the needle on an annual basis. Building momentum to achieve this goal may be a heavy lift because it is a significant cultural shift for an organization whose decision-making historically has been focused on environmental science metrics; therefore, close monitoring and yearly adjustments to amplify the strategies that are working is recommended.</p>
4.5 Ensure board, management and CBP staff have the skills and tools needed to advance DEI within the work of the organization.	✓			✓			<p><i>Findings:</i> No data provided to demonstrate planning or implementation, beyond the trainings that are forthcoming in Fall 2019. Only 10% of survey respondents agree or strongly agree that CBP is achieving this metric.</p> <p><i>Recommendation:</i> Follow through on the trainings and recommended changes to the Governance and Management Framework (see recommendations under Objectives 1 &amp; 4).</p> <p><i>Recommendation:</i> Identify funding to send board, management and staff members to DEI-related conferences and events so that they can start building a professional network focused on advancing DEI in watershed restoration work.</p>
<b>Objective 5. Advance DEI through GIT Workplans<sup>17</sup> and Outcomes</b>							
5.1 Engage communities of color, low income communities, and other underrepresented groups in development and implementation of the workplan.	✓			✓			<p><i>Findings:</i> Only 5% of survey respondents agree or strongly agree that CBP is achieving this metric.</p> <p><i>Recommendation:</i> Work directly with each GIT to identify specific decision—points and other milestones where communities of color, low income communities and other underrepresented groups can influence the development and implementation of the GIT's workplan where appropriate.</p> <p><i>Recommendation:</i> Evaluate the possibility of starting a Community Advisory Board (or other related approaches) that could serve as (1) a sounding board and resource for all GITs as they develop and implement their respective workplans and (2) a feeder pool for identifying and developing leaders from communities of color, low income communities and other underrepresented groups to serve as representatives on groups throughout the Governance and Management Framework. If such a Community Advisory Board is formed, identify funding to compensate these leaders for their time.</p> <p><i>Recommendation:</i> Participate in EJ-led gatherings, such as the University of Maryland School of Public Health DMV EJ conference to</p>

<sup>17</sup> GITs include Sustainable Fisheries, Water Quality, Fostering Chesapeake Bay Stewardship, Habitat, Maintain Healthy Watersheds, Enhance Partnering, Leadership and Management

Objectives and Actions	Status <sup>13</sup>			Assessment <sup>14</sup>			Findings and Recommendations
	N	P	Y	1	2	3	
							build CBP's professional network and bring discussion about implementation of the Chesapeake Bay Watershed Agreement directly into EJ-led spaces.
5.2 Explicitly consider within each workplan how to distribute benefits and improvements more equitably to communities of color, low income communities, and other underrepresented groups.	✓			✓			<p><i>Findings:</i> Only 5% of survey respondents agree or strongly agree that CBP is achieving this metric.</p> <p><i>Recommendation:</i> Review each GIT workplan to determine to what extent equitable distribution of benefits and improvements is already explicitly considered.</p> <p><i>Recommendation:</i> Develop a template for incorporating these considerations into the GIT workplans, and require each GIT to complete this template during the next workplan update cycle. Ideally, updates should be completed in consultation with communities of color, low income communities and other underrepresented groups to ensure that the updates are well-informed.</p>
5.3 Explicitly consider within each workplan how to reduce disproportionate adverse environmental impacts in communities of color, low income communities, and other underrepresented groups.	✓			✓			<p><i>Finding:</i> Only 7% of survey respondents agree or strongly agree that CBP is achieving this metric.</p> <p><i>Recommendation:</i> Review each GIT workplan to determine to what extent reduction of disproportionate adverse environmental impacts is already explicitly considered.</p> <p><i>Recommendation:</i> Develop a template for incorporating these considerations into the GIT workplans, and require each GIT to complete this template during the next workplan update cycle. Ideally, updates should be completed in consultation with communities of color, low income communities and other underrepresented groups to ensure that the updates are well-informed.</p>
<b>Objective 6. Advance DEI through Communications</b>							
6.1 Ensure communication materials are culturally accessible, promote DEI goals, and reflect people of color, low income communities and other underrepresented groups.		✓		✓			<p><i>Findings:</i> Project planning team shared that the Communications Workgroup has done a number of blogs and stories to date that feature people of color or other underrepresented groups. However, only 29% of survey respondents agree or strongly agree that CBP is achieving this metric.</p> <p><i>Recommendation:</i> Conduct a review of communications materials and identify potential areas for improvement.</p> <p><i>Recommendation:</i> Review these preliminary recommendations with communities of color, low income communities and other underrepresented groups to ensure that the recommendations are well-informed prior to implementation.</p> <p><i>Recommendation:</i> Develop and distribute straightforward, accessible DEI communications guidance based on these recommendations, and track changes moving forward.</p>
6.2 Ensure distribution includes avenues designed for people of color, low income communities, and other underrepresented groups.		✓		✓			<p><i>Findings:</i> Strategies in the DWG Outcome Logic Table and Work Plan include documenting these avenues, but no data is provided on whether they are being regularly used across CBP. Only 19% of survey respondents agree or strongly agree that CBP is achieving this metric.</p> <p><i>Recommendation:</i> Develop and distribute straightforward, accessible guidance on distribution of communication materials – including a living database of distribution avenues that reach people of color, low income communities and other underrepresented groups.</p>



Objectives and Actions	Status <sup>13</sup>			Assessment <sup>14</sup>			Findings and Recommendations
	N	P	Y	1	2	3	
Objective 7. Advance DEI through Grant-making and Contracting							
7.1 Develop and explicitly include DEI and environmental justice criteria in grant targets and evaluation.		✓		✓			<p><i>Findings:</i> Management Approach 3.1 in the DWG Outcome Logic Table and Workplan outlines actions to review and revise grant guidance to advance diversity and environmental justice through grant making. No data provided on what action has been taken to date.</p> <p><i>Recommendation:</i> Review recommendations throughout Objective 7 and incorporate priority changes into the DWG Outcome Logic Table and Workplan.</p> <p><i>Recommendation:</i> Make and document changes to grant targets and evaluation controlled directly by CBP.</p> <p><i>Recommendation:</i> Host or participate in a gathering of funders to share lessons learned and build CBP’s professional network for advancing DEI and EJ through grantmaking.</p> <p><i>Recommendation:</i> Develop and distribute straightforward, accessible guidance on including DEI and EJ criteria in grant targets and evaluation to CBP members.</p>
7.2 Provide grant outreach and project-management training to organizations run by and primarily serving communities of color and/or other underrepresented communities.		✓		✓			<p><i>Findings:</i> Management Approaches 3.3 and 3.4 in the DWG Outcome Logic Table and Work Plan outline actions to increase outreach and capacity building opportunities for “community-based grants”; however, it does not specifically define “community-based grants” relative to organizations run by and primarily serving communities of color or other underrepresented communities. DWG Management Approach 3.6 outlines actions to connect environmental justice leaders with funders. DWG Management Approaches 4.2 and 4.3 set goals for identifying organizations and groups that work within diverse Chesapeake communities and identifying which groups may be good candidates for environmental restoration projects and programs. There is no parallel goal specifically for organizations run by and primarily serving communities of color and/or other underrepresented groups.</p> <p><i>Recommendation:</i> Sharpen language in DEI Planning documents, grantmaking guidance, and related implementation actions to reflect a priority on organizations run by and primarily serving communities of color and other underrepresented communities. It is important to make a clear distinction between these organizations and other organizations that engage communities of color and other underrepresented communities but are not led by the community.</p> <p><i>Recommendation:</i> Ensure that tracking efforts maintain this distinction as well. There is value in supporting both types of community-based groups; however, if the distinction is not made in goals and data tracking, resources usually gravitate towards community-based organizations that are not led by the community they serve. This is due to the probability that organizations founded and led by people of color and other underrepresented groups have historically been under-resourced and had challenges breaking into mainstream, predominately white funding streams.</p>
7.3 Ensure grant review committees include people of color and other underrepresented groups.	✓			✓			<p><i>Findings:</i> No data provided to demonstrate planning or implementation.</p> <p><i>Recommendation:</i> Begin tracking representation on grant review committees, and increase representation of people of color and other underrepresented groups.</p>

Objectives and Actions	Status <sup>13</sup>			Assessment <sup>14</sup>			Findings and Recommendations
	N	P	Y	1	2	3	
							<i>Recommendation:</i> If a Community Advisory Board is formed, per recommendation in Objective 5.1, consider what role that committee might play in grant review.
7.4 Promote non-discriminatory policies among applicant organizations, and incentivize applicants to increase DEI in their organizational practices.	✓			✓			<i>Findings:</i> No data provided to demonstrate planning or implementation. <i>Recommendation:</i> Develop funding guidelines that promote non-discriminatory policies among applicant organizations. <i>Recommendation:</i> Incentivize applicants to increase DEI in their organizational practices.
7.5 Incentivize grant projects that align Chesapeake Bay restoration investments with community-identified needs.	✓			✓			<i>Findings:</i> No data provided to demonstrate planning or implementation. Management Approach 3.4 in the DWG Outcome Logic Table and Work Plan outlines actions to provide trainings and capacity building that address restoration projects in areas with diverse and underrepresented populations but does not explicitly connect those projects to aligning with and addressing community-identified needs that may be related to but extend beyond watershed restoration. <i>Recommendation:</i> Incorporate incentives into grant guidelines and funding structure to encourage restoration investments that align with community-identified needs.
7.6 Adopt policies and practices that promote DEI in contracting and consulting.	✓			✓			<i>Findings:</i> No data provided to demonstrate planning or implementation. <i>Recommendation:</i> Develop straightforward, accessible guidance on promoting DEI in contracting and consulting.
<b>Objective 8. Increase DEI Performance of Partners</b>							
8.1 Partner with organizations led or staffed by people of color or other underrepresented groups to implement the Chesapeake Bay Watershed Agreement.		✓		✓			<i>Findings:</i> Only 25% of survey respondents agree or strongly agree that CBP is achieving this metric. Management Approach 3.5 in the DWG Outcome Logic Table and Work Plan outlines actions to build relationships with environmental justice leaders and engage them at various levels of the CBP. DWG Management Approach 3.6 outlines actions to connect environmental justice leaders with funders. DWG Management Approaches 4.2 and 4.3 set goals for identifying organizations and groups that work within diverse Chesapeake communities and identifying which groups may be good candidates for environmental restoration projects and programs; however, there is no parallel goal specifically for organizations run by and primarily serving communities of color and/or other underrepresented groups. No data provided to demonstrate implementation. <i>Recommendation:</i> Identify specific decision-points and other milestones, including in GIT workplans and other governance and management processes supporting the development and implementation of the Chesapeake Bay Watershed Agreement, where communities of color, low income communities and other underrepresented groups can influence the development and implementation of the Chesapeake Bay Watershed Agreement. <i>Recommendation:</i> Evaluate the possibility of starting a Community Advisory Board (or other related approaches) that could serve as (1) a sounding board and resource for development and implementation of the Chesapeake Bay Watershed Agreement and (2) a feeder pool for identifying and developing leaders from communities of color, low income communities and other underrepresented groups to serve as



Objectives and Actions	Status <sup>13</sup>			Assessment <sup>14</sup>			Findings and Recommendations
	N	P	Y	1	2	3	
							representatives on groups throughout the Governance and Management Framework. If such a Community Advisory Board is formed, identify funding to compensate these leaders for their time.
8.2 Partner with organizations that engage people of color, low income communities, or other underrepresented groups to implement the Chesapeake Bay Watershed Agreement.		✓		✓			<p><i>Findings:</i> Only 34% of survey respondents agree or strongly agree that CBP is meeting this metric. Management Approach 1.3 in the DWG Outcome Logic Table and Work Plan outlines a partnership with the Toxic Contaminants Workgroup. DWG Management Approach 1.4 outlines a partnership with the Urban Tree Canopy Goal Team. DWG Management Approaches 4.2 and 4.3 set goals for identifying organizations and groups that work within diverse Chesapeake communities and identifying which groups may be good candidates for environmental restoration projects and programs; however, there is no parallel goal specifically for organizations run by and primarily serving communities of color and/or other underrepresented groups. No data provided to demonstrate implementation.</p> <p><i>Recommendation:</i> Implement existing management approaches and track outcomes and lessons learned.</p> <p>Recommendation: Expand these efforts in parallel with expansion of implementation efforts related to Objective 8.1.</p>
8.3 Encourage CBP partners to adopt and disseminate a clear DEI statement or policy.	✓			✓			<p><i>Findings:</i> No data provided to demonstrate planning or implementation. Only 10% of survey respondents agree or strongly agree that CBP is meeting this metric.</p> <p><i>Recommendation:</i> Once CBP's DEI statement or policy is developed, per the recommendations in Objective 1.2, share this succinct statement with CPB partners. Consider offering a webinar or pursuing other opportunities for discussion and dissemination of both the CBP DEI statement and the lessons learned in developing and adopting the statement. (For example, the annual Chesapeake Bay Watershed Forum may be a good venue to share the CBP DEI statement and goals with a broader watershed-wide audience, as well as the annual Choose Clean Water Coalition conference.)</p>
8.4 Encourage CBP partners to adopt an organizational DEI Plan and assess progress on the plan annually.	✓			✓			<p><i>Findings:</i> No data provided to demonstrate planning or implementation. Only 7% of survey respondents agree or strongly agree that CBP is meeting this metric.</p> <p><i>Recommendation:</i> Building off the dissemination of the DEI statement, per recommendation in Objective 8.3, offer a follow up webinar for CBP Partners that takes a deeper dive into DEI Plans, tracking and assessment.</p>
8.5 Encourage partners to consider DEI in messaging, materials and distribution avenues.	✓			✓			<p><i>Findings:</i> No data provided to demonstrate planning or implementation. Only 12% of survey respondents agree or strongly agree that CBP is meeting this metric.</p> <p><i>Recommendation:</i> Share the guidance developed in response to recommendations considering DEI in messaging, materials and distribution avenues broadly among CBP Partners.</p>
8.6 Encourage CBP partners to offer DEI training and tools to their board, staff and volunteers.		✓			✓ <sup>18</sup>		<p><i>Findings:</i> Only 7% of survey respondents agree or strongly agree that CBP is meeting this metric. Management Approach 2 in the DWG Outcome Logic Table and Work Plan outlines partnerships with Federal</p>

<sup>18</sup> This score is provisionally given, because a significant number of trainings are forthcoming in Fall 2019.

Objectives and Actions	Status <sup>13</sup>			Assessment <sup>14</sup>			Findings and Recommendations
	N	P	Y	1	2	3	
							<p>agencies and States to provide trainings to increase equity and inclusion in hiring practices. The grant under which the DEI Readiness Assessment is being conducted includes development of trainings and tools on DEI, racial equity and EJ issues in Fall 2019.</p> <p><i>Recommendation:</i> Ensure that the Fall 2019 trainings are prominently advertised and well attended, and that tools developed under this grant are distributed to CBP Partners.</p> <p><i>Recommendation:</i> Ask Fall 2019 training participants and tool recipients to evaluate the trainings and tools and provide feedback on what additional trainings and tools could be valuable for them and for their colleagues.</p>
8.7 Encourage CBP partners to track, analyze and report on the diversity of their board, management, staff, interns and other advisory groups as relevant.		✓		✓			<p><i>Findings:</i> No data provided to demonstrate planning or implementation. Management Approach 2 in the DWG Outcome Logic Table and Work Plan outlines partnerships with Federal agencies and States to participate in career fairs, other pipeline building activities, and trainings to increase equity and inclusion in hiring practices; however, it does not specifically offer tracking and reporting guidance. The OW Diversity Dashboard data and resources could be helpful in this arena.</p> <p><i>Recommendation:</i> Develop tracking and reporting guidance for CBP Partners. Where feasible, point CBP Partners to tools that are already established in the field instead of re-creating the wheel.</p> <p><i>Recommendation:</i> Share the guidance broadly among CBP Partners.</p> <p><i>Recommendation:</i> Develop an annual report capturing the information that is being tracked by CBP Partners to help build momentum and accountability across the partnership.</p>