Social Equity Advisory Services & Support

Analytics. Analysis. Advice.

Capability Statement – K.L. Scott & Associates, LLC.
Revised – June 2023

K.L. SCOTT
& ASSOCIATES
ANALYTICS ANALYSIS ADVICE

SBA
U.S. Small Business Administration
8(a) CERTIFIED

SBA
U.S. Small Business Administration
HUBZONE CERTIFIED

GSA MAS

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Company Overview

Social Equity Advisory Management Consulting

KLS&A is a thought leader in social equity by administering strategic data-driven approaches to achieve equitable outcomes

- **Our mission** is to support government agencies in delivering positive outcomes for all communities.
- IT and Management Consulting, founded in 2013
- Deep understanding of local, state, and federal government industries
- Fact-based, data-driven independent advisory services based on industry-leading research
- SBA Certified 8(a) Small Disadvantaged Business
- SBA Certified HUBZone Small Disadvantaged Business

| Strategic Planning | Community Outreach | DEI Training | Supplier Diversity | Workforce Development | Policy Development | Talent Recruitment & Retention | Equity Research & Barrier Analysis | Culture Transformation |

Clients we serve

- Local, state, and federal government agencies
- Government leaders seeking equitable outcomes for **all** communities

KLS&A provides a portfolio of social equity advisory services such as strategic planning, training, research, and communication and outreach

Advisory Services
Unbiased and Independent Advice
Equity experts to identify future state goals and objectives to drive strategic outcomes

Research Data
In-depth Industry Research
Industry leading research and data analysis to drive targeted outcomes and strategic decisions based on facts

Training
Instructor-led Equity Training
Over 100 courses offered online or onsite instruction

Outreach
Communication Expertise
Design and develop the right message to the right audience through the right platform

Why K.L. Scott & Associates?

Technology Independent

Technology Agnostic

Data-driven analysis from leading IT research partners

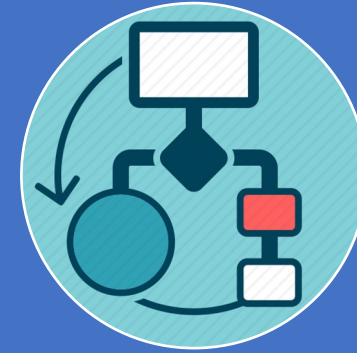## Education & Government Focus

Deep understanding of the challenges facing public policymakers and government agencies

Focus is placed on Voice of the Citizen

Data-Driven Insights

Transform data into information and knowledge that leads to fact-based strategic actions and decisions

Operational Efficiency

Alignment of people, process, technology and data

Optimize organizational performance by identifying inefficiencies

Strategic Advisory Services

"K.L. Scott & Associates **supports government agencies to deliver positive outcomes for all communities** through social equity, digital transformation, organizational strategy & support, and data management & analytics."

– Keith L. Scott, CEO

K.L. Scott & Associates, LLC.

KLS&A delivers insights using a data-driven approach to identify inequities and strategies that improve social outcomes

Building equitable, diverse, and inclusive workplaces and cultural transformation, where individuals have equal access to opportunities.
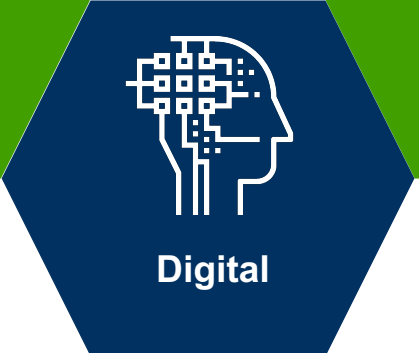
Ensuring environmental policies and fairness are considered for all communities so that no one community bears an overwhelming share of the harmful effects of pollution or environmental hazards.

Identifying and removing inequities present due to disparities and social determinants of health, which supports better health outcomes for individuals and communities.

Workforce

Environment

Social Equity

Health

Economic

Digital

Justice

Building access to economic opportunities for underserved and disenfranchised communities. Includes creating policies that boost equity in the economy for traditionally underrepresented groups.

Removing the barriers, impartiality, and systematic inequities that prohibit individuals and communities from access to resources and fair treatment due to social policy.

Ensuring all individuals and communities have access to information and technology needs to fully participate in our society, education, and economy.

KLS&A social equity practice has driven positive outcomes for multiple government agencies and departments

Project Description	Outcomes / Ongoing Support
U.S. Department of Health & Human Services Administration of Children and Families	**Project:** Building Racial Equity Infrastructure in the TANF Program • Developing analysis tools and products to support state TANF programs across the country to deliver equitable outcomes for benefit recipients
U.S. Department of Health & Human Services Centers for Disease Control and Prevention (CDC)	**Project:** Health Equity Consulting and Training • Supporting the Office of Smoking and Health (OSH) to identify health equity disparities in marginalized communities. • Providing ongoing Equity Analysis and Training
John Hopkins University Jhpiego Corporation	**Project:** Diversity, Equity, and Inclusion Assessment and Strategic Planning • Conducting an organization-wide multi-cultural DEI assessment and developing a strategic plan

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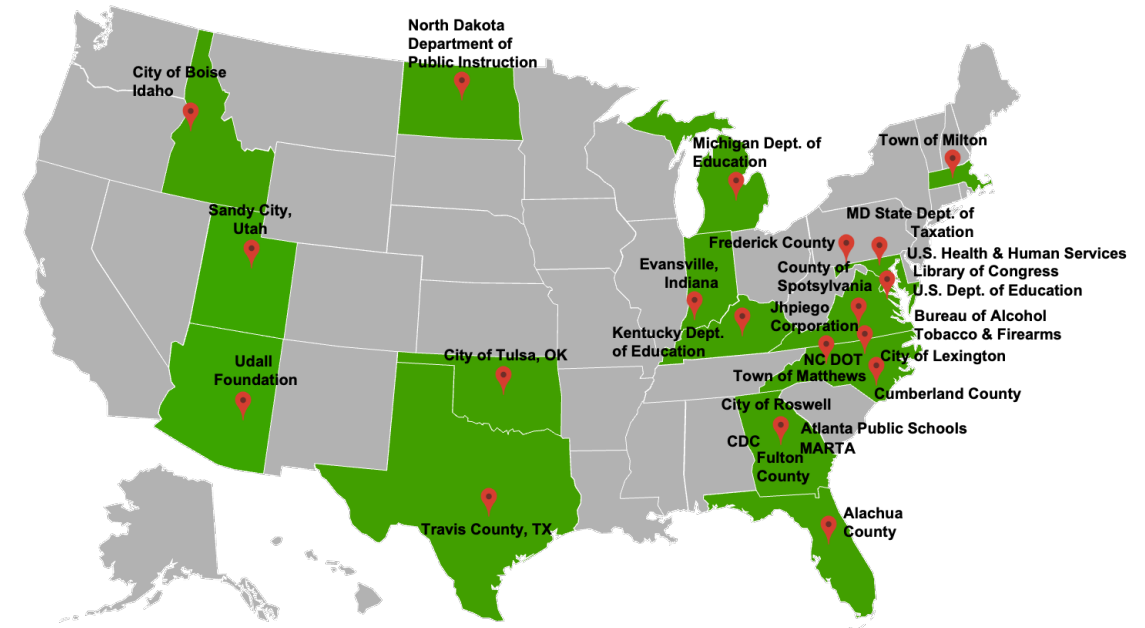
Our team has or is currently providing social equity advisory services for a broad array of organizations

Company Information

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Company Socio-Economic Status & Certifications

GSA MAS Contract #: 47QRAA18D00GU
SBA Certified 8(a) Small Disadvantaged Business
SBA Certified HUBZone Certification Number: 57399
SBA Certified Small Business
Certified Minority Business Enterprise
DUNS Number: 079699626
UEI Number: ZDMJM1T8SCD3
CAGE Code: 7AX15
E-Verify Number: 865643

NAICS Codes

- 541511 - Custom Computer Programming Services
- 541512 - Computer Systems Design Services
- 541519 - Other Computer-Related Services
- **541611 - Administrative and General Management Consulting Services**
- 541612 - Human Resources Consulting Services
- 541618 - Other Management Consulting Services
- 541690 - Other Scientific and Technical Consulting Services
- 541720 – Research and Development in the Social Sciences & Humanities
- 541820 – Public Relations
- 541910 – Market Research and Public Opinion Polling
- 541990 - Other Professional, Scientific, & Technical Services
- 561499 – All Other Business Support Services
- 611420 – Computer Software Training
- 611430 – Professional and Management Development Training

SBA U.S. Small Business Administration — **8(a) CERTIFIED**

SBA U.S. Small Business Administration — **HUBZONE CERTIFIED**

GSA MAS

DBE CERTIFIED — DISADVANTAGED BUSINESS ENTERPRISE

MBE CERTIFIED — MINORITY BUSINESS ENTERPRISE

For 8(a) sole source awards, please send offers to georgiaofferletters@sba.gov

Our Approach
Strategic Advisory Services

KLS&A leverages best practices established by the industry standard Project Management Institute (PMI™)

PMO	**Initiation**	**Planning**	**Execute/Control**	**Closure**

Approve TA Structure and Resources — 01

Approve Project Plan / Approve and Assign Resources — 03

Validate Results of Sow / Transition to Business — 04

Close Project — 05

02

Gate Criteria

Governance Team
- Coordinate resources
- Tool selection and customization
- QA teams
- Centralized support teams
- Operational support (e.g., logistics, administrative, etc.)
- Establish innovation teams

Deliverables
- Customized Framework
- Support Center
- Customized Tools and Communication Protocols (e.g., SharePoint, Emails, etc.)

Gate Criteria

Project Management Team
- Identify Stakeholders (e.g., Grantees, TWG, etc.)
- Transition-in activities from incumbent
- Establish communication cadence
- Finalize core teams
- Project scheduling
- Document and data requests
- Facilitate project kickoff

Deliverables
- Project Resources
- DRAFT Project Schedule
- DRAFT Communications Plan

Gate Criteria

Project Management Team
- Resource planning
- Task scheduling
- Budget planning
- QA/QC and risk planning
- Communications planning

Key Metrics
- % of projects completed
- EVM Metrics (i.e., schedule, cost, etc.)
- Quality measures

Deliverables
- WBS
- Communication plan
- Quality plan

Gate Criteria

Project Management Team
- Monitor TA tasks and resources
- QA/QC review and revision of TA tasks
- Grantee survey for service satisfaction feedback

Key Metrics
- Cost performance
- Quality performance
- Risks and issues

Deliverables
- Cost report
- Task report
- Risk report

Gate Criteria

Project Management Team
- Transition-out
- Contract close-out

Key Metrics
- Operational performance goals

Deliverables
- Project closure document

KLS&A provides social equity advisory services through research & barrier analysis, technical assistance, and strategic planning

Research & Barrier Analysis

- Data Gathering and Analysis
- Identification of Potential Barriers
- Impact Evaluation
- Develop Strategies to Eliminate Barriers
- Strategic Initiative Monitoring and Reporting

Technical Assistance

- Monitoring & Oversight
- Strategic Planning and Performance Management
- Communications Management
- Knowledge Management
- Capacity Building

Strategic Planning

- Define Mission, Vision, and Cultural Values
- Situation Analysis (SWOT, Identify Gaps, Comparative Benchmarking)
- Set S.M.A.R.T. Goals and Objectives
- Identify Strategic Approaches and Implementation Roadmap
- Action Plan and Implementation
- Monitor, Evaluate, and Review and Update Performance

Program Management

KLS&A implements research and barrier analysis to identify and eliminate barriers that may exist in government policy and programs

Identify Potential Barriers

Based on the data analysis, identify potential barriers to equal opportunities. These barriers could include employment, education, technology, healthcare, justice, and/or housing that are biased or exclude certain groups of individuals, discriminatory policies and practices, and lack of access to opportunity.

Evaluate the Impact

Evaluate the impact of the identified barriers on the individual(s). Determine the extent to which these barriers have affected their opportunities.

Analyze Data

Analyze the data to identify any disparities or patterns that may suggest the existence of barriers to equal opportunities. Use statistical methods to analyze the data and identify any patterns that may indicate discrimination or bias.

Develop Strategies to Eliminate Barriers

Based on the findings, develop strategies to eliminate the identified barriers to opportunities. This may involve changing recruitment and hiring practices, revising policies and procedures to eliminate bias, providing training and development opportunities to all individual(s) and communities.

03 **04** **02** **05** **01**

Implement strategies developed to eliminate the barriers and monitor progress over time.

Gather Data

Collect data on the composition of the subject stakeholder, including information on the race, ethnicity, gender, age, disability status, and other characteristics.

KLS&A TA capabilities framework supports government program success and sustainability

Project Management	Strategic Planning	Performance Management	Communication Management	Knowledge Management	Capacity Building
Manage Technical Working Group	Identify Mission, Vision, and Values	Collect Performance Measures	Identify Stakeholders	Develop Training Curriculum	Conduct Workshops & Focus Groups
Identify Stakeholders	Assess Program Needs	Report Grantee Performance	Develop & Manage Communications Plan	Manage Documents	Conduct Surveys
Develop Implementation Plan	Set S.M.A.R.T. Goals and Objectives	Create & Manage Center of Excellence	Manage Social Media	Manage Policy	Facilitate Education Trainings
Manage Events & Logistics	Identify KPIs and Measures	Assess Performance	Manage Website	Develop Tools	Engage Community
Manage Risk	Develop Action Plan	Determine & Assure Compliance	Manage Stakeholder Relationships	Conduct Research	Provide Subject Matter Expertise
Manage Quality	Monitor, Evaluate, & Update Plan		Survey Stakeholders		Develop Partnerships
Manage Budget			Manage Call Center Support		Manage Change
Monitor Compliance			Build Program Awareness		
Report Status			Manage Stakeholder Consortiums / Cohorts		
Oversee Programs					

Through our TA Center of Excellence (TA-COE), we will drive innovation and digital approaches to building capacity

1. TA Executive Dashboard

Monitor TA performance on key success factors.

2. Continue and Expand Website

Leverage AI Bots to expand TA service
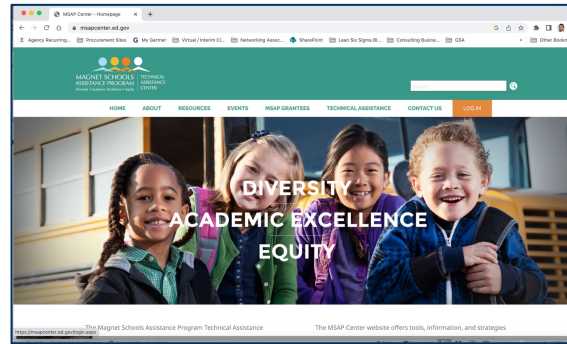
3. Consortium Innovation Labs (Re-imagine the Possible)

Test concepts and pilot programs for innovation.
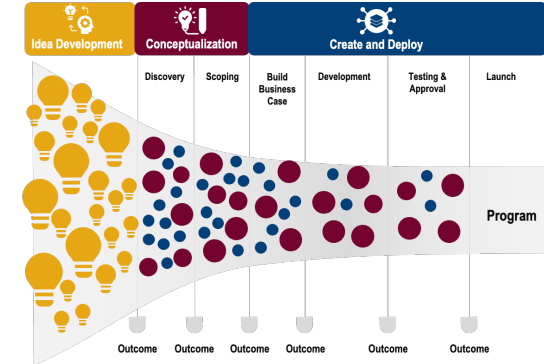
4. Social Media & Podcast

Facilitate discussion of best practices through Podcast

5. Document Collaboration & Knowledge Building

Share tools, templates, whitepapers and other documentation

6. Call Center Support

Dedicated resources to address open questions and issues from the MSAP grantees

APEX™ Value Delivery Framework

Oversee and assure successful implementation of the evaluation plan, such as monitoring timelines and progress, measurement criteria, stakeholder feedback, etc.

EXecute

Assess

Continuous Client Value

Plan
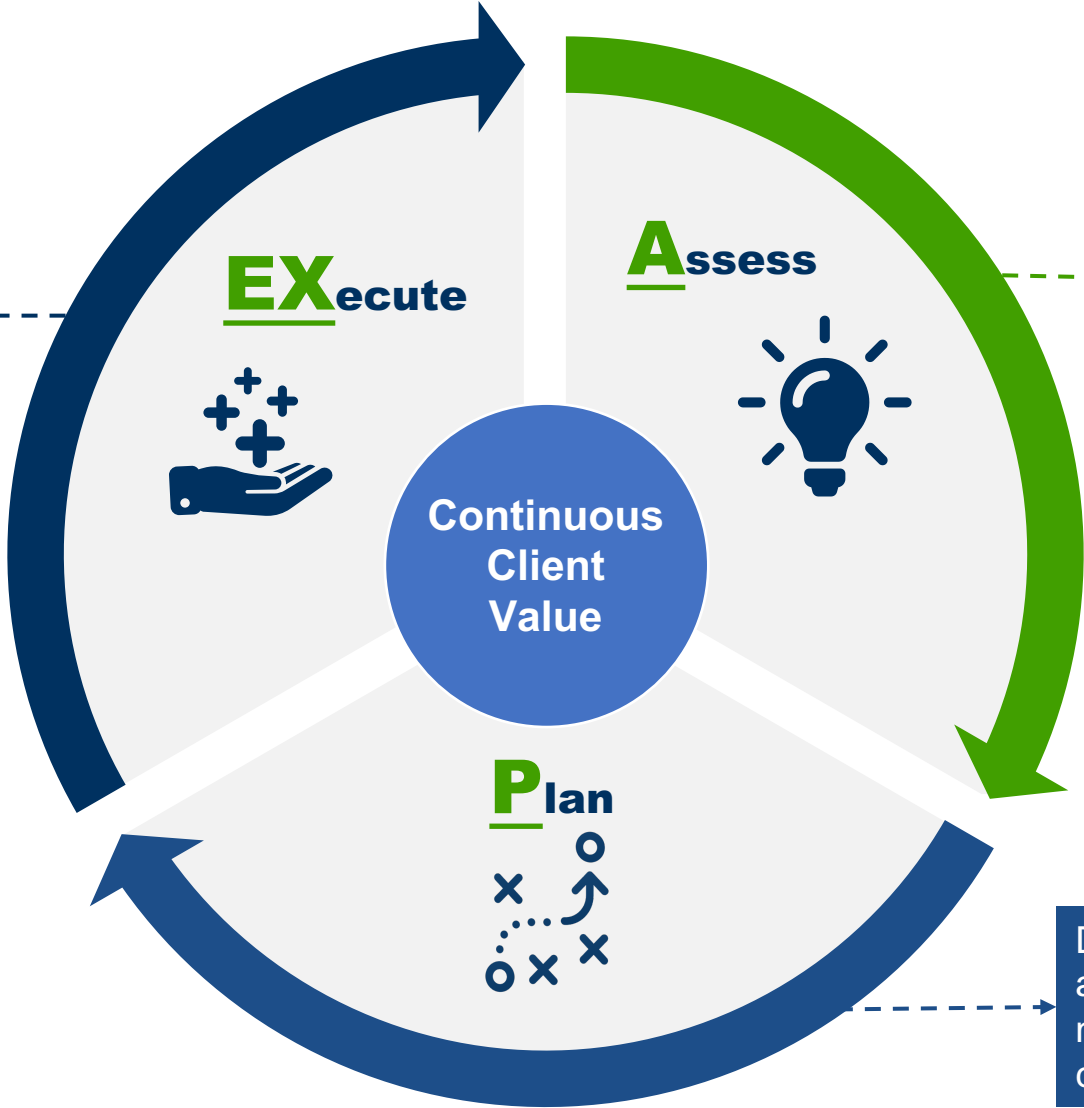
Understand the current situation, such as understanding the evaluation purpose, program description, defining success, stakeholder involvement, etc.

Develop evaluation design, such as evaluation questions, measurable criteria, data collection methods, timelines, etc.

The APEX™ delivery model provides a strategic planning framework that delivers positive outcomes

ASSESS | **Plan** | **EXecute**

1. Initiation

- Identify stakeholders
- Document request
- Schedule interviews, workshops, and/or focus groups

Outcomes
- Project Schedule
- Kickoff Meeting
- Project Status Reports

Iteration

2. Discovery

- Conduct a literary/document review
- Interview stakeholders
- Conduct a quantitative & qualitative survey

Outcomes
- Stakeholder Interview Report Summary
- Survey Results

Iteration

3. Current State

- Identify Measures
- Benchmark Analysis
- SWOT Analysis
- Gap Analysis
- Recommendations

Outcomes
- Current State Assessment and Recommendations Report

Iteration

4. Solution Design

- Identify and select solutions and alternatives
- Identify S.M.A.R.T. goals
- Identify Measures
- Assess organizational readiness for change

Outcomes
- Organizational Change Readiness Report

Iteration

5. Strategy Development

- Organize solutions into a time-based implementation roadmap
- Document action plan

Outcomes
- Implementation Roadmap and Action Plan
- Executive Presentation

Iteration

6. Plan Implementation

- Action Plan Management and Oversight
- Analytic (KPI) Executive Dashboard
- Change Management

Outcomes
- Change Management
- Continuous Plan Performance Monitoring
- Communication Outreach

Iteration

Outcomes

Examples Deliverables
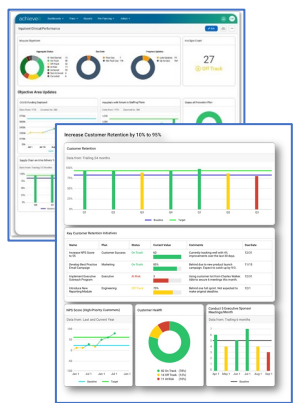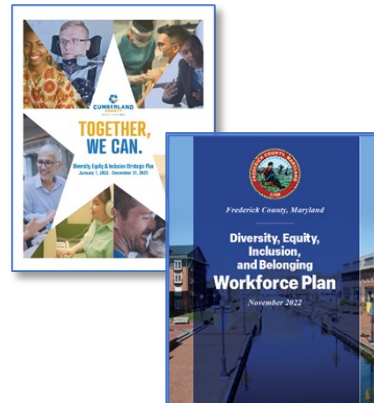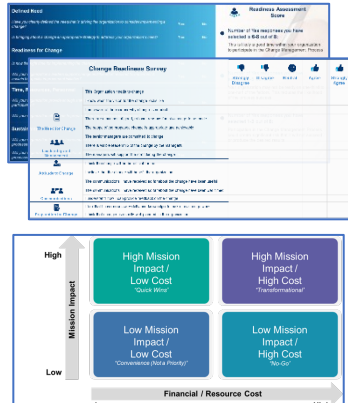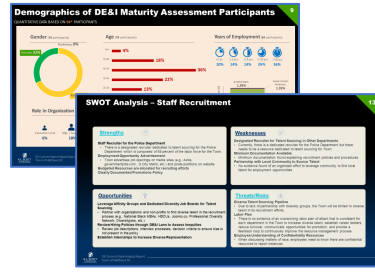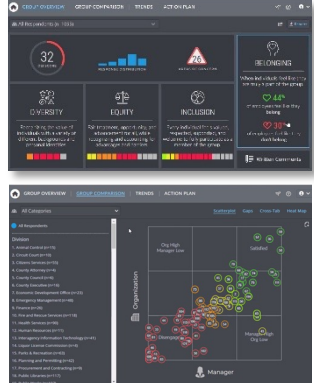
Point of View

Social Equity

Social equity is imperative for all communities because it is the foundation of a fair and just society

It ensures that everyone, regardless of their background, has equal access to opportunities, resources, and rights. Here are some key points supporting the importance of social equity:

Equal Opportunity

Social equity ensures that all individuals have an equal chance to succeed and thrive. It recognizes that not everyone starts from the same position in life and seeks to level the playing field. By addressing systemic barriers, such as discrimination, poverty, and unequal access to education and healthcare, social equity creates a more inclusive society where everyone has the opportunity to reach their full potential.

Human Rights & Dignity

Social equity upholds the principles of human rights and human dignity. It recognizes that every individual deserves to be treated with fairness, respect, and dignity, regardless of their race, gender, ethnicity, socioeconomic status, or other characteristics. Social equity helps to dismantle discriminatory practices and prejudices, promoting a society where all individuals are valued and respected.

Economic Benefits

Social equity is not only a moral imperative, but it also brings economic benefits to communities. When everyone has equal access to education, employment opportunities, and resources, it fosters innovation, productivity, and economic growth. By eliminating barriers and promoting diversity and inclusion, social equity contributes to building a stronger and more prosperous society.
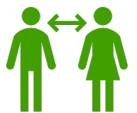
Social Cohesion & Harmony

Social equity plays a crucial role in fostering social cohesion and harmony within communities. When there is a sense of fairness and justice, it reduces social divisions and inequalities that can lead to social unrest. By promoting inclusivity and reducing disparities, social equity contributes to building a cohesive society where individuals from diverse backgrounds can live and work together harmoniously.

Sustainable Development

Social equity is closely linked to sustainable development. Sustainable development aims to meet the needs of the present without compromising the ability of future generations to meet their own needs. By addressing social inequalities and ensuring equitable access to resources, social equity contributes to building a more sustainable and resilient society for the future.

KLS&A leverages experience, data, and technology to support the audit across policy, practices and culture

Policy Equity

- What is the policy purpose?
- What impact and outcome will this policy have?
- How does this policy affect the organization?
- Does the policy remove bias and enable equity?

Practice / Process Equity

- Are all stakeholders represented within our practices?
- What are the optics internal and external to the organization?
- Is equity considered throughout the processes of each practice?
- How do we use data, systems and technology to drive outcomes?

Culture Equity

- Why we do the things we do?
- How we do the things we do?
- Who we think we are in the relation to others?
- How we help each other to succeed?
- What we value and pay attention to?

An equity-focused policy recognizes the need to eliminate disparities in outcomes of stakeholders from underserved and underrepresented populations.

Equity Lens

An equity lens is a process for analyzing or diagnosing the impact of the design and implementation of policies on under-served and marginalized individuals and groups.

Equitable Policies

Well written policies consider potential barriers for underserved and underrepresented then seeks to eliminate them. These groups include race/ethnicity, religious expression, veteran status, nationality, including underrepresented groups and new immigrant populations, people who identify as women, age, socio-economic, people with both apparent and non-apparent disabilities, people of various gender and sexual identities and expressions, American Indians and other indigenous populations.

Equity Review

A protocol for policy review provides a structure for institutionalizing the consideration of equity in the process of making, implementing, and assessing policy.

Discovering bias in programs and processes requires poignant questions

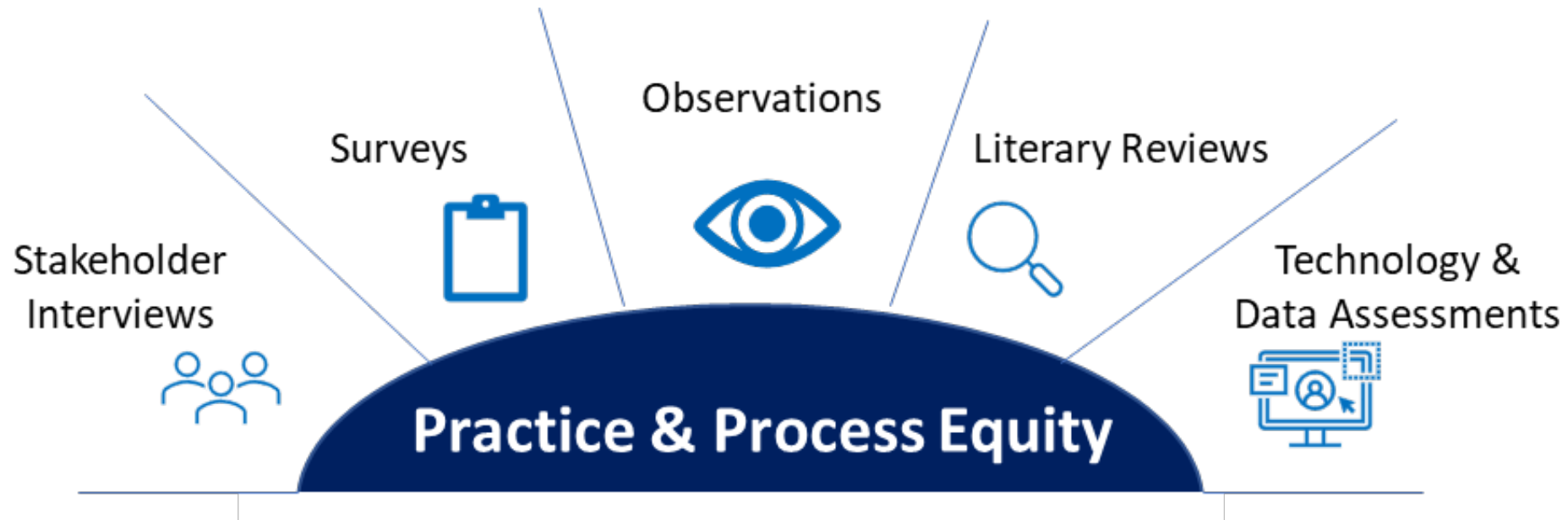| Apply Equity Policy Review	Guiding Principles
Policy Purpose & Design	• What is the policy NOT designed to do? • How is an equity lens incorporated within the development of policy? • If a time requirement or clause is included within the policy language, examine the reason as to WHY it's included.
Impact, Outcome, Design	• What is the intended or desired *impact* of the policy? • What is the intended or desired *outcome* of the policy? • How does the policy reflect key drivers (socio-cultural, technological, environmental, economic, political, legal and ethical)? • What policy features have the biggest impact on the desired outcome?
Disparate Impact	• Does the policy explicitly account for potential disparate outcomes, especially disaggregated by race, ethnicity, gender, socio-economic status, etc.? If so, how? If not, how can it be incorporated? • In what ways does the policy account for focused disparate outcomes (race, ethnicity, gender, socio-economic status, etc)? Are there other area of disparity to consider? • How is an equity lens incorporated in tracking policy outcomes?`
Equity and Inclusion	• Will the policy increase access and opportunity for under- represented communities? How? • Will the policy have a positive impact on racial / ethnic equity, inclusion and full participation of all people (in the process, in implementation, in breadth of outreach and participation, in decision-making and culture of decision-making, etc.)? • Will the policy protect against racial violence, racial profiling, gender inequities, and discrimination? How? • Are there changes that could be made to make the policy more equitable and inclusive?
Responsibility and Accountability	• What are the mechanisms in place to ensure accountability (such as equity-focused benchmarks or indicators)? (Define and provide examples of equity-focused benchmarks/indicators). • What are the mechanisms in place to ensure accountability? Do the lens and tools for accountability incorporate an equity framework? How?

Equity in practice and processes requires assessments and data gathering across five areas

Surveys

Observations

Literary Reviews

Stakeholder Interviews

Technology & Data Assessments

Practice & Process Equity

KLS&A will conduct a series of stakeholder interviews, and web-based surveys to employees and managers, observe practices in process, document reviews and technology & data to visualize outcomes

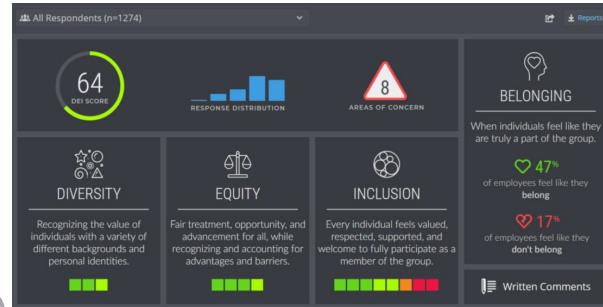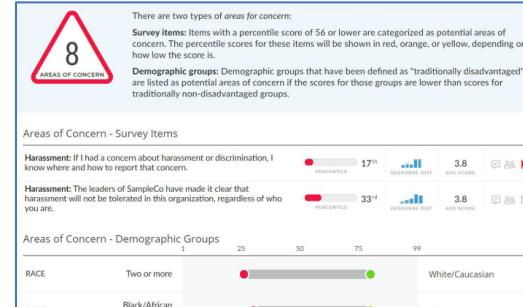# KLS&A implements a data-driven approach to assessing organizational culture through detailed analysis

1. Interactive Dashboard

Organizational performance on key success factors, compared to peers.
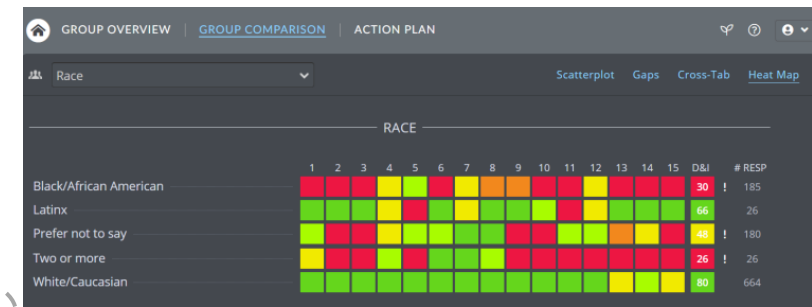
2. Analysis based on Focus Areas

View areas of where to focus your attention.

3. Group Comparisons

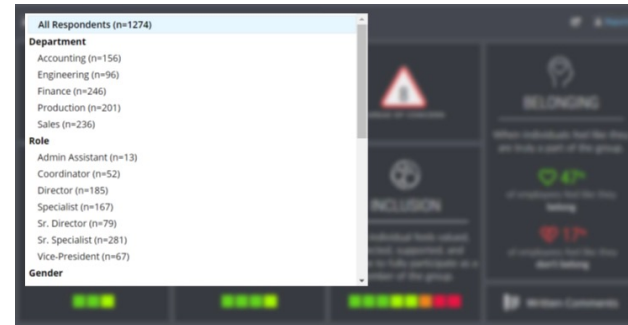Pinpoint problem areas to take corrective action with greater precision.

4. Understand Management "blind spots"

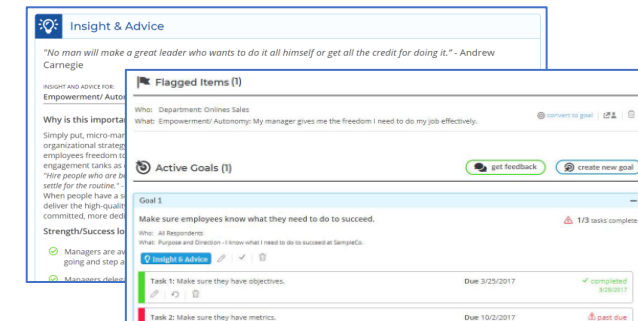Unearthing incorrect or outdated assumptions between management and staff.

5. Filter Results by Organizational Role

Filter your results by any of your groups (department, location, manager, etc.).

6. Gain Insights to Inform Action Planning

Gain insight & advice to inform strategic goals and objectives for action planning.

In conclusion, social equity is imperative for all communities because it promotes equal opportunity, upholds human rights and dignity, brings economic benefits, fosters social cohesion, and contributes to sustainable development

By striving for social equity, we can create a society that is fair, just, and inclusive, benefiting individuals, communities, and society as a whole.
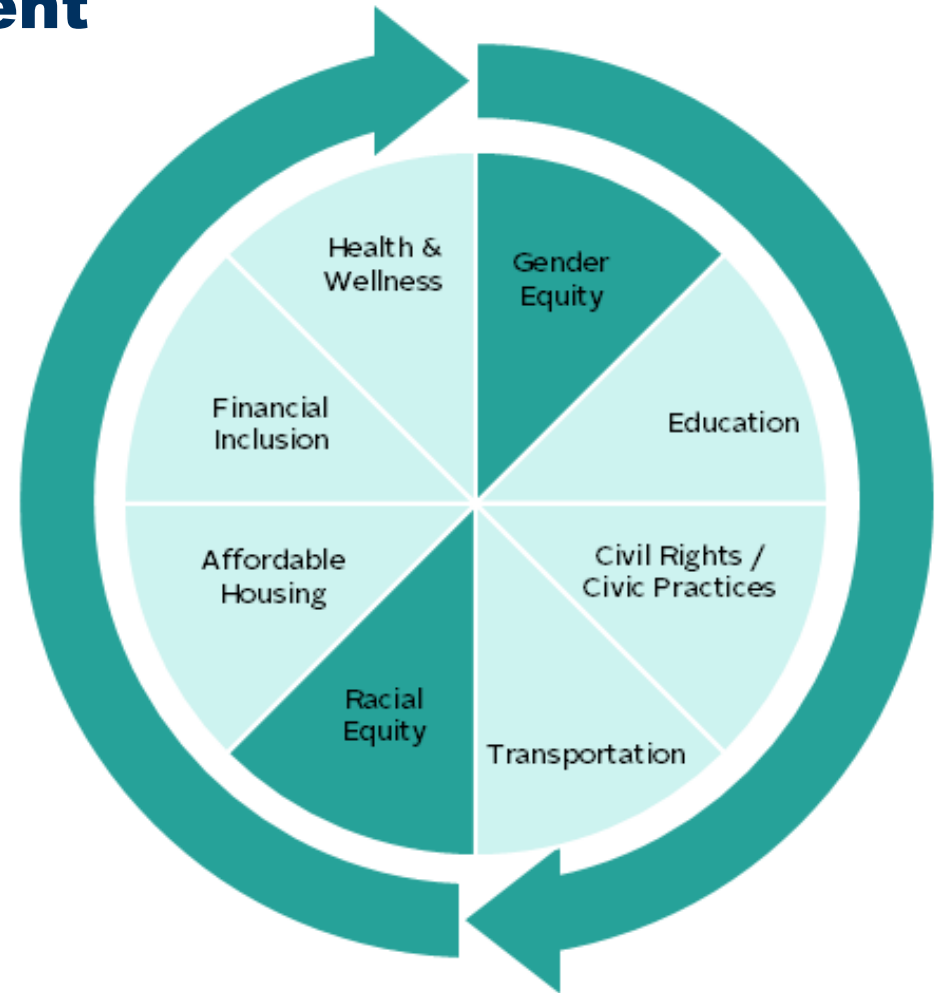
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SBA 8(a) Sole Source Awards

For 8(a) sole source awards, please send offers to georgiaofferletters@sba.gov.

**Appendix:
Case Studies**

U.S. Department of Health and Human Services
Centers for Disease Control and Prevention

The Challenge

The Office on Smoking and Health (OSH) within the National Center for Chronic Disease Prevention and Health Promotion (NCCDPHP) has four major goals: prevent initiation of tobacco use among youth and young adults, promote quitting among adults and youth, eliminate exposure to secondhand smoke, and identify and eliminate tobacco-related disparities. . In alignment with the fourth goal, OSH is developing a new Surgeon General Report on Smoking and Health Disparities and a strategic plan focused on commercial tobacco related health disparities and achieving health equity.

The Solution

KLS&A is providing strategic planning and facilitation services by providing organization development and design, application of systems change, change management, and strategic planning principles. We are designing and leading the facilitation of workshops, providing consultation, and supporting strategic decisions

The Outcome

As a result, KLS&A has provided the OSH with a plan of attack accompanied by performance monitoring capabilities through KPIs to address the disparities identified in the equity study.

The Challenge

The Office of Family Assistance (OFA) within the Administration of Children and Families (ACF) is the federal agency providing guidance to the State and Tribal TANF programs. However, each State, Territory, or Tribe administers their TANF program according to their specific budget and priorities.

In accordance with President Biden's Executive Order on Advancing Racial Equity and Support for Underserved Communities Through the Federal Government, OFA is tasked with assessing and operationalizing racial equity in all of its programs. OFA wants to provide Technical Assistance to TANF programs in assessing racial equity and incorporating an equity lens throughout TANF operations and processes.

The Outcome

Throughout this ongoing project, KLS&A is working collaboratively with OFA, Regional TANF Offices, State and Tribal TANF programs to implement a tailored strategy for assessing racial equity within the selected TANF programs. KLS&A uses an integrative design-thinking approach to engage TANF programs in organizational improvements that support equitable outcomes for recipients and families.

The Challenge

The U.S. Department of Education (ED) Office of Migrant Education (OME) created a Migrant Student Information Exchange (MSIX). MSIX key challenges included: 1) Build awareness of MSIX across the country for SEAs and LEAs to adopt MSIX as a tool to identify students and retrieve their course history and assessment data, 2) Increase the use of MSIX to facilitate migrant student records exchange for SEAs and LEAs, 3) Assist states with identifying data sources to provide the Minimum Data Elements (MDEs) for MSIX operate as intended, and 4) Assist states with process improvements for effective MSIX use.

The Solution

KLS&A provided support to increase awareness and adoption of the MSIX system by enabling stakeholder-based communication channels, conducting data-driven analytics and visualizations of migratory patterns across the country, creating a web portal to access historical requests, driving awareness and training through facilitated webinars, administered data collection and research to implement process improvements, managed a call center, facilitated strategic planning sessions and provided recommendations.

The Outcome

As a result, OME was equipped with visual dashboards to identify migratory patterns across the country, increased alignment and effectiveness of call centers to better support the geographical regions they reside and established an adaptive roadmap of initiatives accounting for forecasted changes in migrant patterns. Furthermore, the usage of the MSIX application for records exchange increased by 218% within three years.

CASE STUDY

The Challenge

Jhpiego Corporation is an international, non-profit health organization affiliated with The Johns Hopkins University dedicated to improving the health of women and families in more than 30 countries worldwide. Jhpiego is known for its technical expertise and innovation for strengthening health systems across the globe. Although Jhpiego is a culturally and linguistically diverse organization, they need clear data about their current state in order to decide how to best formalize DEI operations moving forward.

The Solution

Using the APEX™ model, KLS&A is working collaboratively with the DEI Task Force within Jhpiego to assess the current state of DEI-related policies, programs, and practices by collecting and analyzing qualitative and quantitative data. As the engagement progresses, KLS&A will continue providing insight to Jhpiego to guide the development of strategic DEI priorities, goals, and objectives to intentionally embed DEI throughout their operations.

The Outcome

KLS&A has provided Jhpiego's DEI Task Force with in-depth analysis on DEI throughout its domestic and international operations. Our insight and tailored recommendations allow Jhpiego to make data-driven decisions as they advance their DEI strategy.

CASE STUDY

![Appraisal Subcommittee FFIEC logo]

The Challenge

The Appraisal Subcommittee (ASC) provides federal oversight of the State appraiser and appraisal management company (AMC) regulator programs and provides a monitoring framework for the Appraisal Foundation and the Federal Financial Regulatory Agencies in their roles to protect federal financial institutions and public policy interests in real estate appraisals. Through the President's executive order, ASC may be given additional responsibility and authority to review and assess areas of discrimination in real estate appraisals and applicable policies.

The Solution

K.L. Scott & Associates (KLS&A) developed an operational plan to support ASC through the following services:

- Align time-based activities for the upcoming fiscal year
- Assign resource needs and management of time-based activities
- Provide and associate financial needs to execute operational activities
- Identify and prioritize activities based on ASC's needs
- Integrate approved recommendations provided by the current state assessment from KLS&A into the operational plan

The Outcome

As a result, ASC has a solidified public relations marketing message, succession plan, and strategic direction to take the next steps in refining its strategic plan. Our team continues to support ASC on its strategic initiatives.

HOME APPRAISAL

![Cumberland County North Carolina logo]

The Problem

KLS&A identified five goals and 19 supporting initiatives in the development of the County's DE&I strategic plan. One of the five goals identified the need to hire a Chief Diversity Officer (CDO) to lead the DE&I committee. Because of the political climate of the County, the committee did not want to pursue this goal and absorb the role inside of the duties of the HR Director.

The Solution

KLS&A provided a detailed description of the role of the CDO and the need for organizational independence. We recommended that this individual report directly to the County Manager and operate as its own Department. To assure true independence and oversite of policy development, public relations and communication alignment, and staff recruitment, the CDO would need decision authority that should be given at the executive level.

The Outcome

As a result, the County is moving forward with acquiring a CDO with a supporting staff to oversee the development of county-wide policies, HR practices, and public relations while maintaining independent authority.

CASE STUDY

The Problem

The City Manager and its Council members were challenged with understanding the needs of the City in terms of policy development, hiring practices, community engagement, and operations. The City Manager and Council members did not agree on a first step to achieve their objective of DE&I.

The Solution

KLS&A mediated a decision between Council and the City Manager to move forward with an executive search to appoint a DE&I Manager for the City. However, they did not want to start from scratch and therefore requested KLS&A to administer an initial needs analysis to define the role of the DE&I Manager, identify their job description, goals and objects, and conducted an executive search which led to the permanent hire in the role.

The Outcome

As a result of the initial needs analysis, KLS&A is working with the DE&I Manager to drive policy, staff recruitment and retention, and act as an overall advisor to the DE&I Manager and City Manager.

CASE STUDY

The Challenge

The Town of Matthews North Carolina sought the services of K.L. Scott & Associates to provide professional expertise, facilitation, and training plans to ensure the development of Diversity, Equity, and Inclusion organization by integrating diversity, equity, and inclusion in its work.

The Solution

KLS&A developed a DE&I Strategic Plan that includes the development of goals, objectives and strategic initiatives that accomplish the Integration of DE&I into the internal processes and systems in the agency; Integration of DE&I into communication and public facing work; An organizational commitment and infrastructure across the function of the Town to demonstrably advance DE&I-based transformation; and Developed the Town's skills with which to operationalize racial and other forms of equity and inclusion, including assistance with the development and implementation of an action plan related to performance measures integrating equity into organization decision making and advancing workforce and workplace equity.

The Outcome

The Town of Matthews has an action plan to develop policy, transform their hiring process and DE&I training curriculum to continue to develop their workforce.

CASE STUDY

The Challenge

The County wishes to build organizational commitment and infrastructure across all agencies to demonstrably advance diversity and inclusion-based transformation. County leadership desired an independent consulting firm to guide them through a successful DE&I transformation by conducting a DE&I Audit, developing a DE&I Strategy and corresponding DE&I Plan for implementation of changes

The Solution

KLS&A conducted a series of interviews and workshops to collect qualitative data with county-wide department leaders. Our team captured themes and challenges on a department basis to identify issues related to DE&I and provided a Summary Report that outlined key areas of focus for the County. Our team is utilizing the results achieved from the interviews to customize the DE&I Maturity Assessment to address issues identified. The assessment is providing a current state assessment of the county's risk areas and opportunities for advancement and DE&I transformation.

Our team is currently supporting the County and will deliver a DE&I strategy, communications plan and initiative execution support. The project support is due for completion the summer of 2022.

CASE STUDY

The Problem

Mayor Lauren McLean's vision for the City of Boise is to create a "City for Everyone" where individuals are diverse, treated equitably, where they are included and maintain a sentiment of belonging to the community. Mayor McLean and the city are engaged KLS&A as a trusted partner to assist in the development of strategy and guidance to realize their DE&I vision. According the 2020 U.S. Census, the city's demographic makeup of the city is approximately 83 % White with a remaining 2% African American, .5% American Indian or Alaskan native, 3% Asian, and 9% Hispanic or Latino. Yet, race is not the only thing to consider when discussing diversity. There is religion, gender identity, age, access for individuals with disabilities, diversity of thought, and many other criteria.

The Solution

KLS&A is utilizing our strategic planning framework to assess Boise's workforce culture and identifying, interviewing stakeholders such as the city council, mayor, city manager, department directors, and staff members, determining the city's strengths, weaknesses, opportunities, and threats and developing actionable recommendations to achieve the city's DEI vision of becoming an inclusive city.

CASE STUDY

The Challenge

NCDOT's Office of Civil Rights (OCR) exists to promote and ensure that our customers and employees have equal access to and opportunity to participate in transportation programs without facing unlawful discrimination. OCR carries out this mission by enforcing Federal and State laws and regulations that prohibit discrimination based on race, color, national origin, disability, age and, in certain circumstances, genetics, sex and religion, in programs and activities that receive Federal and/or State financial assistance.

The Solution

KLS&A provided technical, analysis and administrative support. The support identified DBE/MBE/WBE goals on federally funded and state-funded projects for FHWA, FAA, and FTA. KLS&A had direct involvement in the technical administration of several statewide programs and addressed a variety of complex problems which require gathering engineering data, mapping data, business information, taking action, and making recommendations for action by the Section Head and Unit Head. KLS&A also coordinated with other Department Units, Federal Highway Administration (FHWA), Civil Rights Section, Institute for Transportation Research and Education (ITRE), contractors, municipalities, other State Agencies and other states.

CASE STUDY

The Challenge

In an effort to increase the Town's level of diversity, equity, and inclusion, the Town of Milton desires the services of an independent third party to conduct an assessment of its policies, procedures, and budgets for the purpose of advancing equity and justice within its workforce.

The Solution

Our team utilized the results achieved from the qualitative interviews to customize the DEIB Maturity Assessment™ to collect additional data on key issues identified. The DEIB Maturity Assessment™, interviews, and document review provided valuable data to inform the current state assessment of the Town's risk areas and opportunities for advancement and DEIB transformation.

The Outcome

The Town of Milton has a DEI framework to develop inclusive policies, an Affinity Group and a roadmap to advance their DEI initiatives.

CASE STUDY