# Office of the Assessor-Recorder
# RACIAL EQUITY ACTION PLAN



## PHASE I – Internal Programs and Policies
## Updated December 2020

# Table of Contents

# ABOUT THE OFFICE OF RACIAL EQUITY

In July 2019, the Office of Racial Equity (ORE) (Ordinance No 188-19) was created by the San Francisco Board of Supervisors as a division of the San Francisco Human Rights Commission. ORE was legislated in response to the City's growing racial disparities, and as a means to address the history of structural and institutional racism in San Francisco's delivery of services to the public and its own internal practices and systems.

In addition to analyzing the disparate impacts of pending ordinances, the annual budget, as well as various other policy and reporting functions, a core responsibility of the Office of Racial Equity is to oversee the creation of a citywide Racial Equity Framework, including providing technical assistance to departments of the City and County of San Francisco in their efforts to establish Racial Equity Action Plans for their organizations. The enabling legislation mandates that Racial Equity Action Plans shall include Racial Equity indicators to measure current conditions and impact, outcomes resulting from changes made within programs or policy, and performance measures to evaluate efficacy, that demonstrate how a City department will address Racial Disparities within the department as well as in external programs.

# DEFINING RACIAL EQUITY

Racial equity is a set of social justice practices, rooted in a solid understanding and analysis of historical and present-day oppression, aiming towards a goal of fairness for all. As an outcome, achieving racial equity would mean living in a world where race is no longer a factor in the distribution of opportunity. As a process, we apply racial equity when those most impacted by the structural racial inequities are meaningfully involved in the creation and implementation of the institutional policies and practices that impact their lives. — Adapted from Anti-Oppression Resource and Training Alliance (AORTA)

## Racial Equity Leads
Rachel Cukierman, Deputy Director of Administration and Finance; rachel.cukierman@sfgov.org

Simone Jacques, Manager of Administration and Finance; Simone.jacques@sfgov.org

Jonathan Nelly, Director of Human Resources; Jonathan.nelly@sfgov.org

## Racial Equity Team
Al Barber, Real Property Appraiser
Brooke Bahador, Real Property Appraiser
Michael Kelleher, Senior Real Property Appraiser
Jessica Li, Office Assistant
Michael Louie, Real Property Appraiser
Connie Vindell, Principal Real Property Appraiser

## Department Head
Joaquín Torres, Assessor-Recorder

# EXECUTIVE SUMMARY

The San Francisco Office of the Assessor-Recorder is firmly committed to an equitable, safe, and inclusive workplace.  We believe that creating an equitable, safe, and inclusive workplace means pursuing an actively anti-racist environment where employees are welcome and able to grow and thrive.  We recognize that discussing issues of inequity, race, and racism are difficult, especially in the workplace. However, we also recognize that embracing this discomfort and evaluating how status quo policies and practices have led to disparate outcomes, especially along racial lines, is an important part of achieving our goal of advancing a more equitable workplace.

The office is equally committed to advancing racial equity and justice through our community engagement efforts.  Vast differences exist when it comes to economic outcomes experienced by race.  We believe that public financial institutions, such as ours, can lead the way in providing resources and opportunities for our most vulnerable communities, including our immigrant, Black/African American, and Latinx communities.

Phase I of the Office of the Assessor-Recorder's Racial Equity Action Plan (Action Plan) focuses on our internal operating policies and is the product of a collaborative staff effort within the office.  If we are to create a culture of inclusion and belonging, our Action Plan must be rooted in the experiences of our staff and it must pursue the actions identified as most impactful for our office.

As a baseline, the office gathered demographic data to illustrate our challenges and opportunities.  At a high level, the data provides evidence that there is much work to accomplish. In 2020, Black/African Americans made up 6% of the ASR's staff and Latinx employees represented 7% of staff.  This contrasts with 5.2% Black/African American and 15.2% Latino/Hispanic reported by the US Census for the City of San Francisco's general population (July 2019), and in contrast with 15% African American and 15% Latinx employed by the City and County of San Francisco (CCSF) workforce. Furthermore, on average Black/African American staff make $4.90 less than Asian employees in the office, and $10.71 less than staff who are White. Latinx employees have an hourly rate that is only slightly higher than Black/African Americans. This disparity is due to White and Asian employees serving in more of the office's higher paid professional classifications.

Another baseline tool the office used to gather information on office culture and sentiments around race was the ASR's first ever Racial Equity All-Staff Survey. Administered in October 2020, the survey served two main purposes: 1) to inform the ASR's Racial Equity Action Plan, and 2) to serve as a beginning point to measure ourselves against. Unfortunately, the survey had a low number of responses from staff who identified as African American, Latinx, or multi-racial, demonstrating that the office has work to do in creating a safe and open environment to talk about race. The survey results also indicated that 95% of respondents agree that there is value in examining and discussing the impact of race and racial inequity. Not surprisingly, the survey identified that staff generally do not feel comfortable talking about race at work and that training is an important component to further advancing racial equity.

The office's demographic data and Racial Equity Survey illustrate that there is a need and desire to focus internally on equity in the office. To begin the development of a Racial Equity Action Plan, the office appointed Racial Equity Leads and a Core Team (collectively referred to as the Team or Racial Equity Team) that represents diversity across race, ethnicity, gender, sexual orientation, work levels, functions, and authority.

Phase I of the Action Plan looks internally at the ASR's programs and policies.  It identifies tangible actions our office can take and includes indicators that will help us measure progress. To supplement the Action Plan, the office will invest in training that will allow staff to establish a shared understanding of key concepts and racial equity frameworks critical to facilitating conversations about race in the workplace. The implementation of our office's Racial Equity Action Plan is a necessary start towards meaningful institutional change.  Phase II, which has not started, will focus on the office's delivery of services and programs.

Specifically, the Office of the Assessor-Recorder's Phase I Racial Equity Action Plan takes a holistic approach to advancing racial equity within the office. The goal is to attract, retain, and promote underrepresented people of color within the office while simultaneously creating a culture of inclusion and belonging that is embedded in the ASR's core values. We strive to create a space at the table for all groups to contribute in the workplace. We will be explicit about being an anti-racist organization, reject tokenism, and ensure that there is diversity in every division. We will work towards being aware of our own individual biases and create a space where everyone will be comfortable expressing their identities at work.  The office has championed these efforts in the past as the first office in the City to implement mandatory in-person implicit bias training for all employees – implicit bias training is now required citywide online.

The Action Plan recommends advancing racial equity in six areas:

- **Hiring and Recruitment** - The office will put processes in place to increase the number of underrepresented people of color (specifically those that identify as Black and Latinx) who apply for positions and are subsequently hired. We will break down the barriers that keep black, indigenous, and other people of color (BIPOC) from applying to opportunities within the office and ensure everyone is able to showcase their talents and skills in a meaningful way.

- **Retention and Promotion** - The office will actively work towards creating a culture where staff, specifically underrepresented staff, feel valued and have career paths and opportunities for growth, development, and promotion in the office.

- **Discipline and Separation** - The office will adhere to a discipline and separation process that does not adversely impact people of color. If there is harm due to racial inequity or bias, we will have tools to voice those issues so that trust can be restored.

- **Diverse and Equitable Workforce** - The office will work towards creating a diverse leadership team that fosters a culture of inclusion and belonging. We will attempt to remove biases and provide tools for staff, especially Supervisors and Managers, to be able to identify examples of institutional and interpersonal racism.

- **Mobility and Professional Development** - The office will continue to implement mechanisms within the office that create a career path for Assessor-Recorder positions, including our appraiser trainee programs. We will adopt a management approach that supports the success of people of color in their professional development and put measures in place that equalize setbacks they experience due to systemic and societal racism.

- **Organizational Culture of Inclusion and Belonging** - The office will embed the Racial Equity Action Plan into the organization's processes and procedures to foster an intentional culture of inclusion and belonging. We will emphasize collaboration in addressing existing and future anti-racist behavior to strengthen principles of fairness and equity and encourage respect for cultural differences within the office.

This work is not easy and will take focus and time to see results.  However, the Action Plan represents our core values around diversity, equity, inclusion and belonging and we look forward to accomplishing the goals set forth in the first phase of our Action Plan.

# FORMATION PROCESS AND PLAN APPROACH

In July 2020, the Assessor appointed Deputy Director of Finance and Administration, Rachel Cukierman, as the ASR's Racial Equity Lead in response to the Board of Supervisor's resolution and city's formal racial equity planning efforts.  Two additional leads were identified to assist in the effort, including Simone Jacques, Manager of Finance and Administration and Jonathan Nelly, Manager of Human Resource and Training.  As the office's "Leads", the team first met to seek training and to coordinate the strategy and approach to developing the ASR Racial Equity Action Plan.

 A few observations and principles emerged from these initial meetings:

- Formally articulating a Racial Equity Action Plan is new and difficult.  Often, discussions around equity, race, and racism are uncomfortable, especially in work environments.  To create a safe space for these discussions and to ensure planning efforts are inclusive, we believe the City and ASR must invest in additional resources and specialized training to ensure common grounding for our teams and to facilitate conversation and actions.

- A core goal for ASR is to create a plan that is actionable and meaningful to the office.  This goal places a premium on the experiences of staff and the belief that an inclusive process is necessary to drive impactful solutions and to ultimately foster a more open workplace culture.

- We believe in the need to track progress.  In October, we issued an all-staff survey to better understand the office's sentiments around race in the workplace. This all-staff survey identified areas of strengths and weaknesses and serves as a beginning point for our Action Plan.  Our intent is to continue collecting data that helps us assess our progress.

- The ASR Action Plan will include actionable steps surrounding workplace culture and opportunities, but it will also include an outward facing component for our community interactions. Phase I of the ASR Action Plan focuses on internal operations.  We plan to follow with additional review of our community engagement efforts.  While our primary function is a taxation entity with fair and consistent application of law a fundamental value, we have also demonstrated a history of commitment to serving our most vulnerable, including our immigrant, low-income, and communities of color.  We believe our innovative and financial counseling and resource events, like our Family Wealth Forum, helps to narrow the resource and wealth gaps that separate so many along racial lines.

- Finally, we view the December 2020 Racial Equity Action Plan as a living document that will continue to strengthen as we learn more and as we further engage our staff.

Recognizing the need for resources early, the ASR Lead team attended the virtual "Building Racial Equity: Foundations" training conducted by Race Forward in October. That training highlighted the importance of changing the way we lead. It provided a beginning framework for understanding how status quo policies or practices have led to racial inequities, including within our organization. The training provided a framework to creating true equity by acknowledging the disparities that exist and the role race plays. The training also emphasized the need to acknowledge and address four different types of racism: internalized, interpersonal, institutional, and structural. To approach our planning process, we need to begin asking different questions to get at the root cause of inequity and implement actions and strategies that resolve these inequities.

## Strategies to Address Racism

| | |
|---|---|
| Internalized Racism | Support groups, racial healing<br>Mentoring, counseling, and education |
| Interpersonal Racism | Diversity trainings<br>Cross-cultural dialogues, dinners |
| Institutional Racism | Changing policy and practices<br>Creating new institutions |
| Structural Racism | Highlighting history, root causes<br>Challenging racist myths, ideologies<br>Challenging multiple institutions or addressing their interactions |

*Figure 1 Race Forward Building Racial Equity Training 10/27/20*

## Asking Different Questions

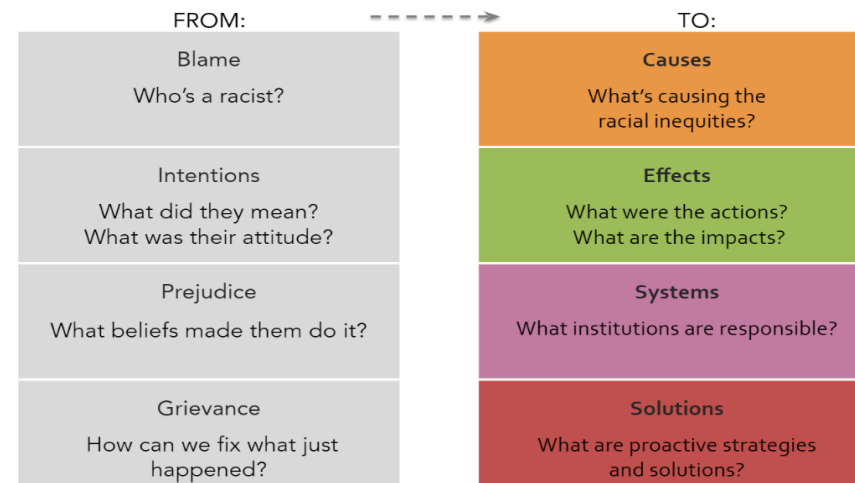| FROM: | TO: |
|---|---|
| **Blame**<br>Who's a racist? | **Causes**<br>What's causing the racial inequities? |
| **Intentions**<br>What did they mean?<br>What was their attitude? | **Effects**<br>What were the actions?<br>What are the impacts? |
| **Prejudice**<br>What beliefs made them do it? | **Systems**<br>What institutions are responsible? |
| **Grievance**<br>How can we fix what just happened? | **Solutions**<br>What are proactive strategies and solutions? |

*Figure 2 Race Forward Building Racial Equity Training 10/27/20*

Building the foundation for this work, the ASR Racial Equity Leads began articulating the responsibilities of participants in the process. As Leads, they accepted the following responsibilities:

- Champion and advocate for racial justice and model the organizational values of equity;
- Lead the Racial Equity Core Team to coordinate, track, and report on the ASR's Racial Equity Action Plan successes, and improvements;

- Inform and implement strategy and plans to advance racial equity and social justice across all areas of work within the office;
- Ground-truth and problem solve around racial equity issues with staff of all levels;
- Meet with employees, especially those whose voices may not be considered, and encourage employee-generated ideas and solutions; and
- Serve as the liaison between the ASR and the Office of Racial Equity.

The office also formed a Racial Equity Core Team. The goal was to create a team of employees that represented diversity across race, ethnicity, gender, sexual orientation, work levels, functions, and authority. On October 20th, the Assessor introduced the office's formal racial equity efforts to the entire ASR staff and put forward a call for volunteers to participate in the Racial Equity Core Team (Core Team). Of the 15 people that expressed interested in the role, 6 staff were selected to serve on the ASR Racial Equity Core Team. These Core Team members included: Al Barber, Real Property Appraiser, Brooke Bahador, Real Property Appraiser, Michael Kelleher, Senior Real Property Appraiser, Jessica Li, Office Assistant, Michael Louie, Real Property Appraiser, and Connie Vindell, Principal Real Property Appraiser. As Core Team members, they accepted the following responsibilities for their role:

- Work closely with the Racial Equity Leads to coordinate the design and implementation of the ASR's Racial Equity Action Plan;
- Attend trainings to build knowledge about the importance of racial equity and how to apply this learning in a workplace setting;
- Disseminate learning, skills, and tools to operationalize equity;
- Catalyze equitable systems change in government and in the community;
- Communicate about racial equity across the office and all management levels;
- Collect and analyze data for documenting, measuring, and evaluating progress; and
- Champion racial and social justice within the office.

Over the last two months, ASR Leads and Core Team or Racial Equity Team worked closely together to develop the office's first formal Racial Equity Action Plan. The Team met an average of three hours a week to prioritize and to customize action items that were most meaningful and impactful for the office. They also discussed plans to further engage staff as the office turns our focus to implementation in 2021. One of the major findings of this process, for example, was the need for more training and preparation. While ASR is leaning on citywide resources such as the Office of Racial Equity as much as possible, it is clear the team would benefit from foundational training to amplify their leadership, facilitation, and development skills. Likewise training for the entire office would also benefit this effort because it builds common understanding and expectations for what it means to have a safe space to discuss life experiences through the lens of race. We strongly believe in the need to build a racial equity plan that is authentic to our office. To facilitate this process, the Team continues to seek and research trainings with a focus on addressing racism and inequity in the workplace. In addition, the Leads and Core Team are creating a library of resources that contains racial equity videos and literature to allow for self-paced, free training. This library will be shared with all staff within the department.

The Office of the Assessor-Recorder's December 2020 Racial Equity Action Plan was shared with the City Attorney and signed off by Executive Leadership. ASR's Racial Equity Leads and Core Team will begin implementing the office's Racial Equity Action Plan in the beginning of 2021.

# OFFICE BACKGROUND AND HISTORY

The Office of the Assessor-Recorder is a medium sized City department with 179 staff and a budget of $39 million.  The office is headed by Carmen Chu, San Francisco's elected Assessor. The office does not have a local Board or Commission, but it is overseen by the State Board of Equalization, which is responsible for auditing counties and promulgating rules and regulations to equalize taxation across California's 58 counties.  Assessment disputes are resolved through an independent Assessment Appeals Board seated by the San Francisco Board of Supervisors.

The primary responsibility of the office is to locate all taxable property in the County, identify ownership, and establish a taxable value. The office is also responsible for applying any legal exemptions and maintaining all County public recorder functions. Laws that govern property taxation is primarily driven by the State Constitution, state regulation, and local transfer tax laws. Property tax revenue is the single largest general fund resource supporting San Francisco's services, including services for seniors, and vulnerable communities.

While the office's core responsibility is to administer State and local property tax laws, Assessor Chu has prioritized service to vulnerable communities in the office's community engagement efforts.  This stems from a commitment to advancing equity and resources to San Franciscans, especially communities that lack financial resources or those with barriers such as limited English language proficiency.  In the area of language access, the office serves as a model ensuring access for immigrant communities.  In addition to executing on a robust language access plan, the office intentionally embeds a translation process for all critical documents and communications from the office, and ensures staff are trained to access on-demand translations services by phone when needed.  These efforts have earned the office the California Public Information Officer Association's highest communications honors, the Epic Award in 2018.

In addition, lack of access to credible financial information and vulnerability to predatory acts are threats to our low-income and immigrant communities. The Assessor's Office has been active in engaging the community to ensure San Franciscans have the tools to understand property tax laws and to build financial resilience.  The office works with local news outlets and multi-language press to circulate financial education resources.  The office has also created a series of multi-lingual educational videos, a website with translated content, a monthly e-newsletter, and digital workshops to augment the public's access to information.  Public outreach is conducted in diverse neighborhoods throughout the city, often partnering with local community-based organizations to amplify the office's reach and message.  In fiscal year 19-20, the office organized 203 community engagements (community meetings, events, workshops, etc.) to provide information to financial services.
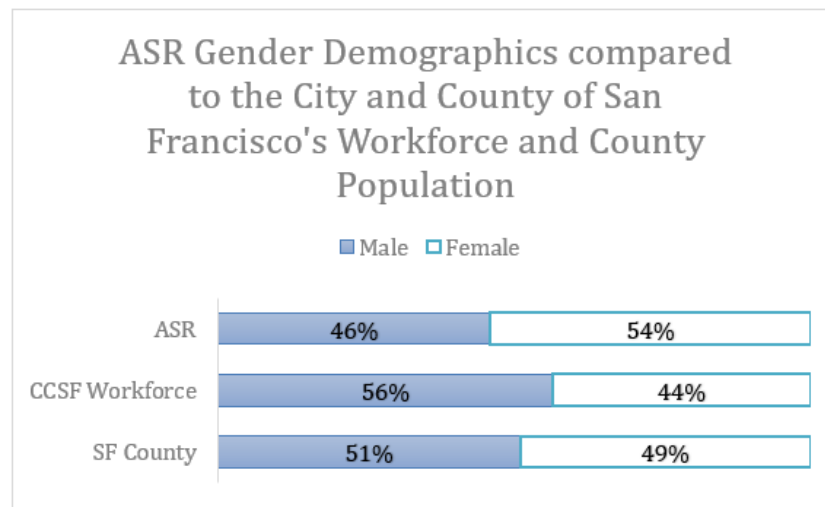
The Assessor's cornerstone public awareness program is the Family Wealth Forum (FWF).  Started in 2017, the award-winning Family Wealth Forum brings volunteer estate planning attorneys, tax experts, and certified financial planners together with Assessor's Office staff to offer free one-on-one counseling and multilingual workshops to local families.  Many of these traditional financial planning resources are not easily accessible to vulnerable communities and those with limited financial means.  The Family Wealth Forum offers an opportunity to bring credible and trustworthy financial resources directly to communities.  Since 2017, Assessor Chu has hosted in-person Forums and stand-alone workshops in every supervisory district in San Francisco, serving over 1,500 families.  The prevalence of COVID-19 has only heighted the urgency and need for reliable financial counseling and

services. When the office pivoted in-person FWF programming to a one-day virtual program, over 300 participants signed up.  Recent announcements of a FWF webinar on state property tax law changes has already garnered close to 2,000 participant RSVPs. This level of interest demonstrates the public value in addressing the information and financial wealth gaps we see, especially for vulnerable communities and communities of color.

# CURRENT WORKFORCE DEMOGRAPHIC DATA

The Office of the Assessor-Recorder has a staff of 179 people serving in various roles to support the assessment and public recording functions. Job classes include professional appraisers, auditor-appraisers, administrative analysts, office specialists and assistants. Additionally, the office's Administrative function includes information technology, human resources, project managers and finance and accounting staff. To assess our staff demographics, the team relied on gender and race data from SF People and Pay, the City's payroll and personnel system. The gender data collected by the City includes Male and Female and does not consider the spectrum of gender by which people may identify. Additionally, the racial categories collected by DHR align to specific federal EEO categories which may not allow for an individual's full racial identity. According to the 2020 Workforce Report "San Francisco has a significant Pacific Islander/ Hawaiian population, but because of Federal race and ethnicity standards, those individuals are not individually tracked, they are grouped under Asian."[1] Therefore we are conscious that this data may not quite fully represent the gender or racial makeup of our staff. To better understand our demographics, we have compared them to the general San Francisco (SF) population and to the City and County of San Francisco's (CCSF's) workforce population. Some data has been aggregated to better relate the data from ASR, SF County and the CCSF Workforce.
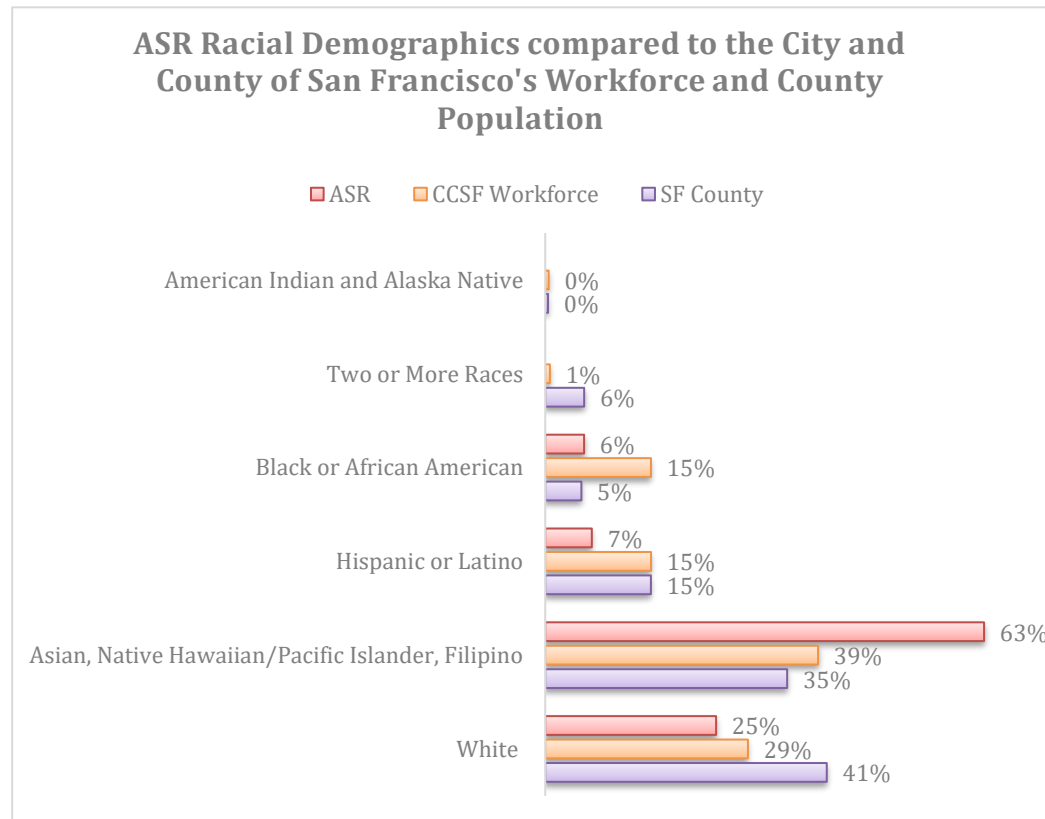
In terms of gender, the breakdown between male and female staff is closely aligned to the CCSF's workforce, though females represent a slightly higher percentage of our staff than exists in the greater San Francisco population. Despite the higher ratio of female staff, the hourly rate for ASR female staff is $3.19 less than the average hourly rate for male staff. This disparity is due to males serving in more of the office's higher paid professional classifications such as 4265 Senior Appraisers, 4220 Jr. Auditor-Appraisers, 1822 Administrative Analysts, and 0931 Managers.  While this is an equity issue that should be addressed, it will not be the focus of this Racial Equity Action Plan.

## ASR Gender Demographics compared to the City and County of San Francisco's Workforce and County Population

■ Male  □ Female

| | Male | Female |
|---|---|---|
| ASR | 46% | 54% |
| CCSF Workforce | 56% | 44% |
| SF County | 51% | 49% |

| FY 20-21 | | | |
|---|---|---|---|
| **Gender** | **Employee Count** | **Employee PCT** | **Avg Hourly Rate** |
| **F** | 96 | 53.6% | $49.60 |
| **M** | 83 | 46.4% | $52.79 |
| **Grand Total** | 179 | 100.0% | $51.19 |

In term of ethnicity, the same analysis laid bare how much further the office needs to go to embody the diversity that makes up San Francisco. When comparing the office to the CCSF workforce and San Francisco population, staff who identify as Asian (including Filipino) make up the overwhelming majority of staff at 63%. While Hispanic/Latinx represent 15% of the CCSF workforce and the San Francisco population, they make up only 7% of the ASR staff. Black/African Americans make up 15% of the CCSF workforce and 5.2% of the San Francisco population according to July 2019 U.S. Census estimates, but only 6% of ASR's workforce.

All the equity indicators for Black/African American and Latinx staff in the office point downward, including pay and job classification level. The average hourly rate for Black/African American staff in ASR is $45.14, or $10/hour less than Whites and $5/hour less than Asians. Hispanic/Latino average hourly rate is $48.24, again much less than their Asian and White counterparts.

### ASR Racial Demographics compared to the City and County of San Francisco's Workforce and County Population



*SF People and Pay Workforce Dashboard, Employee count, % and avg hourly rates by race*

| Ethnicity Group Descr EEO4 | FY 20-21 | | |
|---|---|---|---|
| | Employee Count | Employee PCT | Avg Hourly Rate |
| Asian | 113 | 63.1% | $50.04 |
| Black | 10 | 5.6% | $45.14 |
| Hispanic | 12 | 6.7% | $48.24 |
| White | 44 | 24.6% | $55.85 |
| Grand Total | 179 | 100.0% | $49.82 |

Looking at the breakdown of job class categories by race, Hispanic and Black/African Americans lack true representation throughout the office. The combination of these negative indicators could be the reason that the count of Black/African American and Latinx staff has declined over the past five years. Over this same period of time, the number of White and Asian staff has grown.  Through the implementation of our Action Plan we will analyze the root cause of this decline and work to improve our recruitment and retention of severely underrepresented groups. The disparity by race is stark and only highlights the need to lead intentionally with race.



## Job Class Category by Race/Ethnicity

■ White   ■ Asian   ■ Black   ■ Hispanic

| | White | Asian | Black | Hispanic |
|---|---|---|---|---|
| Grand Total | 25% | 63% | 6% | 7% |
| Manager / Deputy / Director Level | 50% | 39% | 6% | 6% |
| Supervisor Level | 33% | 54% | 4% | 8% |
| Senior Level | 21% | 69% | 5% | 5% |
| Journey Level | 16% | 71% | 5% | 7% |
| Entry Level | 26% | 57% | 9% | 9% |

*Note: The Office of Racial Equity worked with the SF Controller and Department of Human Resources to produce a report pursuant to its ordinance;* [this report](#) *was released on March 10, 2020 to Mayor London Breed and the SF Board of Supervisors. As a follow-up to the Phase I report publication, in Summer 2020 ORE will work with DHR, the Office of the Controller and City Departments on producing Phase II analysis. The Phase II report will provide a more granular review of the intersection of department-specific employment decisions and race as well as gender, namely for hiring, promotions, professional development, terminations, and compensation decisions for all City employees.*

*SF People and Pay Workforce Dashboard, Employee count by race*



Employee Count

| Fiscal Year Descr | Asian | Black | Hispanic | Multiracial | White |
|---|---|---|---|---|---|
| FY 20-21 | 113 | 10 | 12 | | 44 |
| FY 19-20 | 113 | 11 | 12 | | 44 |
| FY 18-19 | 113 | 10 | 15 | 1 | 41 |
| FY 17-18 | 106 | 11 | 13 | 2 | 46 |
| FY 16-17 | 98 | 12 | 13 | | 44 |
| FY 15-16 | 93 | 14 | 15 | | 36 |

# RESULTS FROM DEPARTMENT ASSESSMENT AND EMPLOYEE SURVEY

In parallel to the development of the Racial Equity Action Plan, the Racial Equity Leads created and administered an All-Staff Racial Equity Survey. The All-Staff Racial Equity Survey served two main purposes:

1) To inform the office's Action Plan. For example, staff stated they are in favor of receiving more training around racial equity and inclusion. The ASR's Racial Equity Action Plan has specific goals to ensure training for staff and leadership.
2) To serve as a baseline to measure ourselves against. The All-Staff Racial Equity Survey will be updated and administered to staff on an annual basis. The results will be compared year-over-year as one indicator to measure progress.

The racial equity survey was issued to staff between Friday 10/23/2020 and Friday 10/30/20. Survey questions and a summary of responses is provided in Appendix B. The survey contained 24 multiple choice questions with six possible responses: strongly disagree, disagree, neutral, agree and strongly agree. There were also three short answer questions that allowed staff to provide freeform comments. The survey received a 62% response rate with 111 submittals out of 179 total staff. The respondent demographics closely matched the demographics of the office. However, due to the low numbers of Black/African American, Hispanic/Latino, or Multi-racial staff in the office, responses from these groups were aggregated into a single non-White/non-Asian category to protect the identities of those staff. The chart below breaks down the survey responses by race and job category.

| | | Comparison of Strongly Agree & Agree by Race/Ethnicity | | | | | Comparison of Strongly Agree & Agree by Job Class | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Response Count** | | 111 | 11 | 45 | 23 | 32 | 111 | 13 | 36 | 30 | 13 | 12 |
| **Dept demographics** | | 179 | 22 | 113 | 44 | | 179 | 23 | 56 | 58 | 24 | 18 |
| **Response Rate** | | 62% | 50% | 40% | 52% | | 62% | 57% | 64% | 52% | 54% | 67% |
| **#** | **Question** | **All** | **Non-White/Non-Asian** | **Asian** | **White** | **Did not identify** | **All** | **Entry Level** | **Journey Level** | **Senior Level** | **Supervisor Level** | **Manager / Deputy Level** |
| 1 | I think it is valuable to examine and discuss the impacts of race and | 95% | 100% | 96% | 100% | 91% | 95% | 92% | 94% | 100% | 92% | 100% |
| 2 | I have a basic understanding of concepts related to racial equity. | 90% | 82% | 89% | 96% | 91% | 90% | 77% | 97% | 83% | 100% | 92% |
| 3 | I feel comfortable talking about race and equity in my personal life. | 87% | 100% | 84% | 96% | 81% | 87% | 77% | 92% | 90% | 85% | 92% |
| 4 | I feel comfortable talking about race and equity within my work setting. | 45% | 45% | 53% | 43% | 34% | 45% | 54% | 47% | 50% | 38% | 50% |
| 5 | I feel comfortable expressing my identity at work. | 69% | 64% | 71% | 83% | 59% | 69% | 62% | 75% | 63% | 77% | 92% |
| 6 | I feel competent in my interactions with people of other races. | 86% | 100% | 80% | 91% | 84% | 86% | 92% | 89% | 83% | 69% | 100% |
| 7 | I have positive relationships with employees in my department that are | 96% | 100% | 91% | 100% | 100% | 96% | 92% | 94% | 97% | 100% | 100% |
| 8 | I know how to identify examples of institutional racism (i.e., when | 55% | 55% | 53% | 57% | 56% | 55% | 54% | 61% | 43% | 38% | 75% |
| 9 | The City's Civil Service Merit System rules (e.g., civil service exams, | 39% | 18% | 44% | 39% | 38% | 39% | 31% | 44% | 33% | 62% | 33% |
| 10 | The City's Civil Service hiring and promotive processes are fair and | 34% | 27% | 36% | 43% | 28% | 34% | 38% | 33% | 33% | 54% | 25% |
| 11 | My department's recruitment process is equitable and helps to create a | 52% | 18% | 58% | 61% | 50% | 52% | 69% | 44% | 40% | 85% | 58% |
| 12 | My department has equitable hiring processes. | 48% | 27% | 53% | 52% | 44% | 48% | 62% | 39% | 33% | 77% | 75% |
| 13 | Opportunities for promotion in my department are accessible to | 56% | 36% | 60% | 65% | 50% | 56% | 69% | 39% | 57% | 92% | 75% |
| 14 | My department provides equal opportunities for training and | 70% | 64% | 73% | 83% | 59% | 70% | 92% | 56% | 67% | 92% | 92% |
| 15 | My department is committed to racial equity. | 66% | 45% | 76% | 74% | 53% | 66% | 77% | 58% | 67% | 85% | 75% |
| 16 | My department has a diverse workforce. | 68% | 45% | 78% | 74% | 56% | 68% | 77% | 69% | 67% | 69% | 50% |
| 17 | I observe/have observed racial tension between employees in my | 20% | 27% | 16% | 13% | 28% | 20% | 15% | 25% | 17% | 15% | 25% |
| 18 | Opportunities to meet with other staff within my affinity group (other staff | 42% | 45% | 64% | 13% | 31% | 42% | 46% | 47% | 47% | 46% | 33% |
| 19 | Addressing racial disparities and racial equity should be a priority for the | 72% | 73% | 71% | 87% | 63% | 72% | 77% | 83% | 63% | 77% | 83% |
| 20 | Leadership in my department support discussions about institutional | 53% | 45% | 53% | 65% | 47% | 53% | 54% | 36% | 53% | 85% | 75% |
| 21 | In my department, supervisors and managers hold all employees to the | 71% | 64% | 76% | 96% | 50% | 71% | 85% | 58% | 73% | 85% | 100% |
| 22 | My department provides support for resolving workplace issues | 38% | 18% | 51% | 35% | 28% | 38% | 54% | 33% | 37% | 31% | 50% |
| 23 | My department provides me with the resources and tools I need to do | 83% | 82% | 89% | 96% | 66% | 83% | 85% | 86% | 80% | 92% | 100% |
| 24 | My department should create a racial equity plan. | 64% | 91% | 60% | 78% | 50% | 64% | 69% | 75% | 47% | 77% | 83% |
| 25 | I need more tools or training to address institutional racism in the | 46% | 36% | 51% | 52% | 38% | 46% | 38% | 44% | 40% | 62% | 67% |
| 26 | I want to be more actively involved in advancing racial equity in my | 50% | 91% | 38% | 74% | 34% | 50% | 54% | 47% | 43% | 46% | 83% |

The Core Team analyzed the survey results and used the strongly agree (SA) and agree (A) responses to formulate the following findings:

- 95% of respondents strongly agree (SA) or agree (A) that it is valuable to examine and discuss the impact of race and racial inequity
- 87% of respondents feel comfortable talking about race in their personal life. Generally, staff feel less comfortable talking about race at work (45% SA or A)
- 52% of respondents felt the office's recruitment process is equitable. There is a wide gap in this thinking between White (61%) and non-White/non-Asian (18%) responses.
- 48% of respondents felt the office's hiring process is equitable. Again, there is a wide gap in this thinking between White (52%) and non-White/non-Asian (27%) responses.
- 56% of respondents felt that opportunities for promotion were accessible to everyone. There is a wide gap in this thinking between White (65%) and Non-White/non-Asian (36%).
- 56% of all respondents disagree or strongly disagree that they have observed racial tension in the office. However, 20% of all respondents strongly agree or agree that they have observed racial tension in the office. Non-White/non-Asian respondents were more likely to observe tension (27% vs 13% for White respondents and 16% for Asian respondents). 20% were neutral.
- 53% strongly agree or agree that leadership supports discussions about institutional racism. Fewer felt the office provided support for resolving workplace issues involving race (38%), the lowest opinion was with Non-White/non-Asian where only 18% strongly agree or agree. 45% of respondents were neutral on this question.
- 91% of Non-White/non-Asian staff strongly agree or agree that the office should create a racial equity plan, versus 64% of all respondents.
- 46% of respondents wanted more tools to address institutional racism, Managers felt most strongly about this (67% SA & A).

The following key findings summarize a subset of staff comments:

- The office must build trust so that staff feel comfortable and confident sharing their identity and opinion/experience with racial equity in the office. Almost 29% of respondents chose not to select a racial identity when responding to the survey.
- There is a very clear divide in the experience of racially dominant groups versus the office's underrepresented groups. The non-white/non-Asian groups have little trust in the Civil Service or office recruitment, hiring and promotion processes. This group does not feel that the office has a diverse workforce or is committed to racial equity. Lastly, this group is less trusting of the office and feels less supported. The Racial Equity Team needs to explore sentiments among this group exclusively to better understand and improve their experience and opportunities from growth, promotion and development.
- Employees were direct about the lack of diversity within Leadership. The workforce demographics reflect this and the Action Plan will include goals and objectives that help change this pattern.
- Employees were concerned about favoritism and unresolved personnel issues that have become a barrier to inclusivity. The Racial Equity Team will explore this sentiment in the working groups during plan implementation.

# RACIAL EQUITY PLAN GOALS, OBJECTIVES AND ACTIONS

See following page

| Action # | Action Description | Indicators | Implementation | Lead | Timeline | Status | Resources Committed |
|---|---|---|---|---|---|---|---|
| Section 1. Hiring and Recruitment: Identify, Attract, Invest in and Retain a Diverse City Workforce. Racial homogeneity within hiring and recruiting networks reproduce historical inequities in access to family-sustaining, living wage jobs. Therefore, cultivating an inclusive workforce requires intentional efforts in and with diverse, underrepresented and underserved communities. Rather than passively waiting for diverse candidates and people with non-traditional backgrounds to apply, Departments can and should actively seek these individuals out. This includes assessing the most basic barriers to access that influence the City's applicant pool, and developing a clear, intentional outreach strategy. Further, partnering creatively within non-traditional outlets, community-based organizations, BIPOC professional networks, re-entry programs, SFUSD and community college systems will cultivate a rich pool of diverse candidates. | | | | | | | |
| Department Goal: The Department will put processes in place to increase the number of underrepresented people of color (specifically those that identify as Black and Latinx) who apply to Department positions and are subsequently hired. We will break down the barriers that keep BIPOC people from applying to opportunities within the Department and ensure everyone is able to showcase their talents and skills in a meaningful way. | | | | | | | |
| Subsection 1.1. Develop a hiring and recruitment policy and procedure that aligns with the Citywide Racial Equity Framework and the department's RE Action Plan. | | | | | | | |
| 1.1.1 | Assess current conditions and barriers that impede 1) potential applicants' ability to competitively apply to available positions, and 2) disallows current, competitive employees to apply. | Working groups held<br><br>Data from DHR obtain and analyzed | 1. Obtain data from DHR (5 years of historical data) to review and analyze the ethnicity of who applied to ASR positions.<br><br>2. Report to ASR leadership and Core Team on whether the data shows a drop out rate of underrepresented people of color. Use the data to determine at what step of the application process the drop out rate occurs to help narrow down the ASR approach to removing barriers.<br><br>3. Core Team will convene working groups of Operations staff to better understand whether there are barriers to applying to positions within the department. | Racial Equity Core (REC) team working with Human Resources (HR) team | Intermediate (1-2 years) | Planning | Human Resource (HR) staff to perform analysis, ASR leadership team, REC team, staff convened in working groups. |
| 1.1.2. | Implement an annual staff survey to assess departmental diversity and inclusivity that would inform hiring and recruitment goals, particularly looking for gaps within data. Survey data and results are disaggregated and included in the department annual review. | Survey Complete | 1. Draft an Annual Racial Equity Survey for all ASR staff.<br><br>2. Administer the survey and assess results with the Racial Equity Core Team.<br><br>3. Share the results with ASR leadership.<br><br>4. Use survey results as a benchmark to gauge whether implementation of the department's Racial Equity Action Plan is impacting results.<br><br>5. Adjust the Racial Equity Action Plan based on survey results as applicable. | REC Team working with HR | Short term (3-6 months) | Complete | REC team to update survey, HR staff to review and create survey, staff to respond to survey, REC team to analyze survey results, Leadership team to absorb and lead with equity at the forefront. |
| 1.1.3. | Draft and release an equitable and inclusive hiring and recruitment policy that includes learnings and feedback from staff survey and applicant barriers assessment. This policy must be vetted by the Racial Equity Leaders and any related working group. | Policy is complete | 1. HR will create an ASR Hiring and Recruitment Policy that is informed by 1) the ASR Racial Equity Survey results, 2) Operations Working Group feedback, and 3) has been vetted by the Racial Equity Core Team and ASR leadership. | Human Resources | Intermediate (1-2 years) | Planning | Survey results from 1.1.2, HR team to draft policy, REC team to review, ASR leadership team to review, Assessor to approve policy. |

| Action # | Action Description | Indicators | Implementation | Lead | Timeline | Status | Resources Committed |
|---|---|---|---|---|---|---|---|
| **Subsection 1.2 Strengthen recruitment and hiring strategies to attract and cultivate diverse candidates at all levels of the department.** | | | | | | | |
| 1.2.1 | Develop a clear and expansive recruitment process that addresses most basic barriers to access to employment opportunities, and stretches beyond existing outreach protocols to new and unexpected outlets and networks. Map and track outreach efforts. | Defined recruitment process; tracking new outlets to recruit from; recruiting from new outlets | 1. The Core Team will convene Working Groups from Operations to better understand where ASR positions can be recruited from.<br><br>2. The Core Team interview the California Assessor's Association or the Board of Equalization to see if they have ideas around where positions can be recruited from.<br><br>3. Once a list of new recruitment outlets has been determined, HR will track what outlets the department is recruiting from.<br><br>4. The ASR HR team will discuss with DHR if the department can obtain data about where applicants learned about ASR job postings (1 years worth of historical data). This will help inform the ASR recruitment approach so that we can see how we can expand our outreach efforts. | REC Team working with HR | Intermediate (1-2 years) | In progress | REC team to convene working groups, staff to participate in working groups, HR staff to determine new recruitment outlets, DHR to advise on recruitment sources, HR to develop defined recruitment process and tracking mechanism. |
| 1.2.2 | Foster relationships with new and unexpected outlets, community-based organizations, BIPOC professional networks, re-entry programs, SFUSD and community college systems that could feed into open positions. | Increase in underrepresented people of color in applicants<br><br>Increase in # of relationships developed with other organizations | 1. The HR team will reach out to the new outlets about job openings within the Assessor's Office.<br><br>2. The Racial Equity Leads will work with the Department's Public Affairs Team to engage community-based organizations that ASR has a relationship with to 1) inform them about job opportunities and career paths within the office, and 2) to ask them about other organizations ASR can post job opportunities. | Human Resources and Public Affairs Team | Short term (3-6 months) | In progress | HR staff to research appropriate recruitment outlets, DHR to advise on potential recruitment opportunities, Public Affairs to maintain relationship with community organizations. |
| 1.2.3 | Review, simplify, and standardize job descriptions and minimum qualifications to remove any barriers to attracting a diverse candidate pool and those with diverse life, education, and professional experiences. | Candidate pool is increasing applicants from underrepresented people of color | 1. The Core Team will convene Working Groups from staff from Operations to get a better understanding of whether there are barriers to entry and whether the department should / can broaden the MQs for department specific job classifications. The Working Groups will look at the jobs requirements to determine if there is degree inflation. The team will also take into account any adverse impact and unintended consequences of changing MQs.<br><br>2. The Core Team will reach out to other counties, the Board of Equalization, and other institutes to see what they require in their job specifications.<br><br>3. If the department determines that we should broaden our MQs, this will need to be in partnership with the unions and Civil Service Commission. | REC team working with HR | Intermediate (1-2 years) | Planning | REC team to convene working groups, staff to participate in working groups, HR staff to advise on MQ amendment process, Leadership, Assessor, and applicable labor partners to approve any job description or MQ changes. |

| Action # | Action Description | Indicators | Implementation | Lead | Timeline | Status | Resources Committed |
|---|---|---|---|---|---|---|---|
| 1.2.4 | Interrogate necessity of minimum qualifications (MQs) that may disproportionately create racial inequities in hiring and recruitment.  Consider the option of learning on the job or relevance of transferable skills.  Remove unnecessary/outdated MQs for certain classifications to expedite hiring and allow for greater equity. | Program that provides more on-the-job training implemented.<br><br>MQs reviewed and amended to create more opportunities for applicants, hires and promotions. | 1. ASR will accomplish this objective as described in action item 1.2.3.<br><br>2. ASR has taken this action for the 4260 series. In 2017, ASR resurrected its 4260 Real Property Appraiser Trainee Program. The 4260 trainee program provided on-the-job training to qualify for the journey level 4261 Real Property Appraiser classification. Additionally, the 4260 trainee program created more promotive opportunities for internal ASR staff who without it, would not qualify for the higher 4261 classification. Over the course of 3 years, ASR ran two 4260 trainee programs. 11 trainees graduated from the program. Out of the 11, 9 were internal, and 2 were external, 7 of which were female and 4 male, and 8 were POC.<br><br>3. ASR has taken this action for the 4213 and 4215 positions. In 2018, ASR conducted a position study of our department specific 421X clerical series. Through this position study, we determined that the level of work needed to perform daily operations for our Recorder, Exemptions and Transactions Divisions was at the 4215 senior level. This, however, created a gap between the 4215 and 4213 entry level classifications. ASR worked with SEIU to amend the MQs of both the 4213 and 4215 to allow for 4213 incumbents to qualify for the senior level through on-the-job experience, thus creating more opportunities of advancement for 4213s. Additionally, we lowered the minimum # years of experience for the 4213 entry level position, to provide more opportunities for applicants to qualify. | Operations and HR team | Short term (3-6 months) | Complete | N/A |

| Action # | Action Description | Indicators | Implementation | Lead | Timeline | Status | Resources Committed |
|---|---|---|---|---|---|---|---|
| 1.2.5 | Review the need for supplemental questions. Does this job require the applicant to write well as a part of their job duties? If not, reconsider supplemental essay questions, unless grammar and other writing skills will not be considered. | Reachable applicants are increasing from underrepresented people of color | 1. The Core Team will convene Working Groups with Operations to get a better understanding of how to evaluate applicants and whether the department's current process should change.<br><br>2. The HR Team will obtain data from DHR (5 years of historical data) on the ethnicity of applicants. The department will break down the data in the following ways:<br>- Who applied<br>- Who passed MQs<br>- Who is reachable<br><br>3. Based on the data from DHR, the department will be able to see if there is a dropout rate based on the application process and where the drop out rate occurs.<br><br>4. The HR team will identify what positions the department currently uses supplemental questionnaires / tests and the reason why.<br><br>5. The HR Team will develop a checklist to determine when a supplemental questionnaire should be used. This will allow for transparency and consistency in the process. | REC team working with HR | Intermediate (1-2 years) | Planning | REC team to convene working groups, staff to participate in working groups, HR staff to advise on supplemental questionnaire use. |
| 1.2.6 | Reject the practice of "degree inflation" which exacerbates racial disparities in educational and wealth attainment by requiring a four-year college degree for jobs that previously did not. Be specific about the hard and soft skills needed for the role. | Internal review completed of positions requiring a four-year degree which previously did not.<br><br>MQs reviewed and amended as necessary to reflect changes to removing the requirement for a four-year degree for positions that do not need them. | 1. ASR will accomplish this objective as described in action item 1.2.3.<br><br>2. Participate in citywide efforts to assess degree requirements for entry level positions that previously did not require them or should not. | Working groups and HR team | Long term (3-5 years) | In progress | REC team to convene working groups, staff to participate in working groups, HR staff to advise on MQ amendment process, Leadership, Assessor, and applicable labor partners to approve any job description or MQ changes. |

| Action # | Action Description | Indicators | Implementation | Lead | Timeline | Status | Resources Committed |
|---|---|---|---|---|---|---|---|
| 1.2.7 | Require outside recruiters to comply with departmental standards for equitable and inclusive hiring to ensure the production of diverse and qualified candidate pool.  Use outside recruiters who bring an equity lens and culturally-competent skills to their work. | Third-party recruiters comply with equitable and inclusive hiring standards. | 1. ASR does not typically use outside recruiters since most of our positions are department-specific, and are recruited by our ASR HR Team. Should ASR use outside recruiters in the future, the Department will work with DHR to ensure their pool of City-approved recruiters comply with equitable and inclusive hiring standards. | HR team | Long term (3-5 years) | Complete | N/A |
| **Subsection 1.3 Invest in a diverse and equitable talent pool by formalizing robust internship, fellowship, pre-apprenticeship and apprenticeship programs, and provide equal opportunity towards permanent employment.** | | | | | | | |
| 1.3.1 | Create, maintain, and develop internship stipends and paid fellowship opportunities. Be clear and upfront about the ability to fund internships and fellowships during the interview process. | Internship and/ or fellowship program is joined or created | 1. The Project Management Office will research different internship and fellowship opportunities that the City already offers (i.e. the Mayor's Opportunities for All program).<br><br>2. If City internship and fellowship programs are not a good fit for the Department, the Department will create our own internship program. This will include working closely with Operations and Administration to determine what type of opportunities within the office is a good match for an intern. The department will also need to identify staff within the organization who want to sponsor an intern.<br><br>3. The new program will look into the possibility of partnering with sister departments such as TTX  and CON so that interns can gain experience in multiple organizations.<br><br>4) The Core Team will create a targeted recruitment plan for interns and fellows. | Project Management Office (PMO) and REC team | Long Term (3-5 years) | Planning | Project Manager to manage creation of program. REC team and Operations staff to advise on internship structure and job duties and program structure, finance to request budget to develop and run program, potential partners as TTX/CON. |
| 1.3.2 | Identify and secure a minimum number of departmental summer placements and employee mentors for participants in the Mayor's Opportunities for All program. | Participate in Mayor's Opportunities for All program.<br><br>Increase # of opportunities for youth workers in ASR. | 1. ASR will submit a budget request to participate in the Mayor's Opportunities for All program, and pursue other internships, fellowships, and mentorship programs as described in other action items in the plan. | HR team | Short term (3-6 months) | In progress | Finance to request budget to participate in program, Operations staff to advise on job duties and supervise interns |

| Action # | Action Description | Indicators | Implementation | Lead | Timeline | Status | Resources Committed |
|---|---|---|---|---|---|---|---|
| 1.3.3 | Disrupt employment patterns relying on a 'feeder model' that consistently pulls candidates from the elite institutions and universities. Target local community colleges, trade schools, training programs, re-entry programs, public high schools, etc.<br><br>e.g. SF Unified School District's Career Pathways Program. | Increase # of contacts and resources in all levels of learning institutions and universities, as well as local community colleges and groups. | 1. ASR will accomplish this objective as described in action # 1.2.1. We will work with DHR's Diversity and Inclusion Division and community groups to create a list of resources that stretch beyond the City's current Applicant Tracking System (ATS) JobAps.<br><br>2. ASR will explore targeting non-traditional methods of recruiting. | HR team | Short term (3-6 months) | In progress | See action 1.2.1 |
| 1.3.4 | Include opportunities to expand collective knowledge regarding diversity, equity, and inclusion. | All staff trained in areas focused on diversity, equity, and inclusion. | 1. ASR will accomplish this objective as described in action # 6.1.6. We will assess the date in our Racial Equity survey and convene working groups to determine what ASR staff need to expand our knowledge regarding diversity, equity, and inclusion in the department. | REC team, Working Groups and HR team | Intermediate (1-2 years) | In progress | see action 6.1.6 |
| 1.3.5 | Track and evaluate outcomes including reviewing the application process and resulting hires by race/ethnicity, to address any fallout due to bias. Collect constructive feedback of intern and fellowship experiences. Adjust programs accordingly. | Reachable applicants are increasing from underrepresented people of color.<br><br>Hire underrepresented people of color | 1. ASR will accomplish this objective through action # 1.3.1. We will first determine if any of the City's internships and fellowships are a good fit for the Department. If not, the Department will create its own, and work with sister departments to create a shared learning experience for participants. Through these internship or fellowship programs, the Department will track and review the process to address any fallout due to bias, and adjust the programs as necessary. | REC team and HR team | Intermediate (1-2 years) | In progress | see action 1.3.1 |
| **Subsection 1.2 Commit to standardized, transparent, and participatory recruiting and onboarding.** | | | | | | | |
| 1.4.1 | Maintain a standardized and holistic interview process with structured interview questions. | Standardized interview process with structured interview questions that promote diversity, equity, and inclusion. | 1. ASR has already taken this action. ASR currently uses and will continue to use a standardized interview process and structured interview questions. ASR HR will continue to review our interview process to determine if there area any gaps, and work with hiring managers to ensure that the process promotes diversity, equity, and inclusion. | HR team | Short term (3-6 months) | Complete | N/A |

| Action # | Action Description | Indicators | Implementation | Lead | Timeline | Status | Resources Committed |
|---|---|---|---|---|---|---|---|
| 1.4.2 | Ensure a diverse hiring panel for each interview. | Diverse demographic composition of each interview panel for all ASR recruitments.<br><br>Track and compile demographic data of each interview panel for all ASR recruitments moving forward. | 1. ASR has already taken this action. ASR currently uses and will continue to require diverse hiring panels for all of its recruitments. ASR HR works directly with hiring managers to ensure that all interview panels are diverse based on gender and race.<br><br>2. ASR tracks the demographic composition of its interview panels to determine if there are any gaps with the selection of its interview panel members. | HR team | Short term (3-6 months) | Complete | N/A |
| 1.4.3 | Train staff on conducting interviews, taking care to focus on implicit bias and equity.  This includes staff involved in selecting interns and fellows | All applicable staff trained in Fairness in Hiring.<br><br>Comply with Mayor's Executive Directive 18-02 that all supervisors, hiring managers, or any staff involved in the hiring process be required to take the City's Fairness in Hiring Training prior to participation. | 1. ASR has already taken this action. Per the Mayor's Executive Directive 18-02, all supervisors, hiring managers, or any employees involved in the hiring process are required to take the City's Fairness in Hiring Training prior to participation. ASR has trained all of its supervisors, hiring managers and interview panel members prior to making hiring decisions for all of its recruitments. ASR HR will continue to identify and require any staff who will be involved in a hiring process to take the Fairness in Hiring Training to ensure compliance.<br><br>2. ASR is also working with its Racial Equity Core Team to determine other trainings for staff to take that focuses on implicit bias and equity.<br><br>3. Additionally, ASR is exploring having staff take the City's Implicit Bias training on an ongoing basis. | HR team | Short term (3-6 months) | Complete | N/A |
| 1.4.4 | Adopt a tool to track application progress and provide assistance where needed through multiple means to reach more job seekers. | DHR implements new ATS. | 1. ASR has already taken this action. ASR HR currently participates and will continue to participate in citywide monthly working groups related to hiring modernization and implementation of the City's new Applicant Tracking System (ATS) that will replace JobAps.<br><br>2. ASR HR will provide feedback at these sessions to ensure that they meet the needs of the people who will effectively use it. | HR team | Intermediate (1-2 years) | Complete | N/A |
| 1.4.5 | Share and post all job openings internally. Abide by department's RE Action Plan goals for accessibility. Share and post all job openings internally.  Abide by department's RE Action Plan goals to create and streamline professional mobility. | All ASR  job openings are shared to all staff. | 1. ASR has already taken this action. ASR HR currently shares and will continue to share all job openings via all-staff emails as  well as its through its monthly electronic HR newsletter, which is accessible to all staff. | HR team | Short term (3-6 months) | Complete | N/A |

| Action # | Action Description | Indicators | Implementation | Lead | Timeline | Status | Resources Committed |
|---|---|---|---|---|---|---|---|
| 1.4.6 | Decrease and close lags and long wait times in hiring, interviewing, and onboarding processes that can cause delays in service provision and potential economic harm to interested applicants. | Decrease in time to hire.<br><br>Track time to hire data. | 1. ASR has already taken this action. While time to hire is a known citywide issue and due to Citywide rules and processes, including the dependency of Request to Fill (RTF) position approvals by DHR and the MBO, ASR has put practices in place to expedite hiring internally.<br><br>2. ASR HR writes persuasive justifications for RTFs and responds quickly to any DHR and/or MBO questions to expedite the RTF approval process. ASR HR also works closely with hiring managers to gather all of the necessary information needed to conduct a recruitment. ASR HR then determines which steps of the hiring process can be done concurrently, as to not waste any time for one step to end before starting another step.<br><br>3. ASR will continue to evaluate its hiring process and make any efficiencies within our control. Additionally, we will continue to share any feedback with DHR about issues or solutions with time to hire. Moving forward, will also start to track time to hire for its recruitments to determine any gaps or issues that lead to delays. | HR team | Intermediate (1-2 years) | Complete | N/A |
| 1.4.7 | Formalize and standardize the onboarding process for full-time and part-time staff, volunteers, interns, fellows, and freelancers. | Standardized onboarding process for appointees regardless of position. | 1. ASR has already taken this action. ASR currently uses and will continue to use a standardized onboarding process for all of its new hires and internal appointments. Additionally, ASR HR has revamped its onboarding process to provide all new appointees with all of the necessary information they need to hit the ground running on day one of starting with the Department.<br><br>2. ASR HR will continue to evaluate its onboarding process and make any efficiencies as necessary to ensure a smooth welcome to new hires, regardless of position, into the Department. | HR team | Short term (3-6 months) | Complete | N/A |
| 1.4.8 | Expand upon the default Certification Rule of Three Scores.  For example, expanded to the Rule of Ten or more. | Expand the default certification rule. | 1. ASR has already taken this action. ASR currently requests and will continue to request the broadest possible certification rule allowable for each examination it conducts. This is a Citywide issue and is dependent on Union agreement, which the Department has not always been successful in achieving.<br><br>2. ASR HR will continue to work with its labor partners to provide justification for the expansion of the certification rule for all of its examinations.<br><br>3. ASR HR will also continue to participate in Citywide efforts to expand the default certification rule for both its department-specific positions and non-department-specific positions. | HR team | Long term (3-5 years) | Complete | N/A |

| Action # | Action Description | Indicators | Implementation | Lead | Timeline | Status | Resources Committed |
|---|---|---|---|---|---|---|---|
| Section 2. Retention and Promotion: Our Workforce is Our Largest Asset. Retaining a strong workforce means supporting our employees holistically to ensure that they are affirmed, in and out of the office.  A competitive salary, inclusive benefits and opportunities for advancement ensure that our workforce can sustain themselves and their immediate family, and oftentimes, due to the wealth gap and the effects of systemic racism, their extended families and friends.  A clear and intentional path to promotion addresses barriers to upward mobility that systemically face underrepresented employees.  Lastly, acknowledging and responding to any potential inequitable impacts of the COVID-19 pandemic on frontline City workers will be essential. | | | | | | | |
| Department Goal: The Department will actively work towards creating a culture where staff, specifically underrepresented staff, feel valued and have career paths and opportunities for growth, development, and promotion in the department. | | | | | | | |
| Subsection 2.1 Ensure stronger protections for workers of color given anticipated COVID-19 related deployment, budget shortfalls, hiring freezes, layoffs, and furloughs. | | | | | | | |
| 2.1.1 | Track deployment and the given functions of all DSW workers (frontline work and remote work) deployed throughout the period, disaggregated by race/ethnicity, age, gender, classification, pay, union, tenure with the City, accommodations/disability, etc. Compare aforementioned demographics of employees who volunteered through the DHR DSW survey with those who were requested/deployed. | Tracking mechanism created.<br><br>Demographic data compared by workforce and DSW assignment. | 1. ASR has already taken this action. ASR has been tracking staff who have been deployed or assigned as DSW. ASR will continue to track and compare ASR's demographic data to the DSW tracking data disaggregated by race/ethnicity, age, gender, classification, pay, union, tenure with the City, accommodations/disability, etc.<br><br>2. ASR currently does not have any staff who have volunteered through the DHR DSW survey; however, we will continue to track that data and compare should any staff volunteer. | HR team | Short term (3-6 months) | Complete | N/A |
| 2.1.2 | Conduct internal budget analysis with racial equity lens and DSW data, to inform current and future staffing needs.  Develop strategies to prevent inequities in layoffs and furloughs. | Budget analysis completed.<br><br>Track demographic and classification data should layoffs occur. | 1. ASR will conduct budget analysis with current FY21/22 and FY22/23 budget submission.<br><br>2. ASR will also identify training needs and request for additional budget to expand the racial equity training provided for staff.<br><br>3. Additionally, ASR will review the City's layoff rules, and apply the racial equity lens when it comes to adverse impacts to BIPOC employees as a result of layoffs through budget reductions. | Finance and HR team | Intermediate (1-2 years) | In Progress | Finance team to conduct budget analysis and request funding for training in the annual budget. Managers to review and prioritize equity when proposing any layoffs. |
| 2.1.3 | Ensure that frontline DSW workers have access to necessary PPE to complete their job function, including, but not limited to, masks, gloves, gowns, and access to hand washing and sanitizing materials. | PPE access protocol established by the COVID Command Center. | 1. ASR does not have frontline DSW staff. All ASR staff are considered essential and have been performing their normal day-to-day duties either remotely or onsite. Any ASR staff that have been deployed as DSW have been provided with the necessary PPE to complete their job function. | HR team | Short term (3-6 months) | Complete | N/A |

| Action # | Action Description | Indicators | Implementation | Lead | Timeline | Status | Resources Committed |
|---|---|---|---|---|---|---|---|
| 2.1.4 | Offer and clarify additional benefits for compensation, paid sick leave, and flex time for deployed workers. | Communicate with all staff any additional benefits for compensation, paid sick leave, and flex time for staff. | 1. ASR HR will work with DHR and citywide staff to advocate for additional benefits for staff.  ASR currently offers Alternative Work Schedules, telecommuting, and flexible schedules for staff.<br><br>2. ASR HR often communicates benefits for compensation, paid sick leave, and flex time to all staff via all staff emails and through our monthly HR newsletter, as information and updates are received.<br><br>3. ASR HR will continue to respond to inquiries from staff related to paid leave benefits and compensation, and explore any additional benefits to deployed ASR DSW staff beyond what the City currently provides. | HR team | Short term (3-6 months) | Complete | HR team |
| 2.1.5 | Consider DSW caretaking and safe transportation constraints when making assignments to avoid additionally burdening workers. | Evaluate staff ability and availability to perform both their Department tasks and DSW assignments if applicable. | 1. ASR has already taken this action. ASR coordinates COVID Command Center requests for DSW and determines assignments with respect to ability and availability of staff.<br><br>2. All ASR staff are considered essential and have been performing their normal day-to-day duties either remotely or onsite. ASR will continue to evaluate staff ability and availability and ensure that staff workload and DSW assignments are balanced, as to not create any additional burden on them. | Executive Leadership and HR team | Short term (3-6 months) | Complete | N/A |
| **Subsection 2.2: Ensure salaries and benefits meet or exceed industry standards while actively pursuing income equity, centering the experiences of women and people of color.** | | | | | | | |
| 2.2.1 | Conduct annual internal reviews of salary standards against industry standards to ensure parity. | ASR salary standards reviewed for department-specific positions. | 1. ASR has already taken this action. ASR currently determines and will continue to determine salary placements based on experience rather than past income, which has had an adverse impact and inequity towards women and BIPOC.<br><br>Additionally, salary standards are determined by the City in conjunction with each respective labor organization representing its members in every City department. With that said, ASR salary standards for its department-specific positions, meets and/or exceeds industry standards, comparable to other Assessor-Recorder organizations in the SF Bay Area.<br><br>ASR will continue to work with DHR and its labor partners to ensure that the Department meets and/or exceeds industry salary standards for its department-specific positions, while pursuing income equity for women and BIPOC. | HR team | Intermediate (1-2 years) | In Progress | N/A |

| Action # | Action Description | Indicators | Implementation | Lead | Timeline | Status | Resources Committed |
|---|---|---|---|---|---|---|---|
| 2.2.2 | Conduct annual internal reviews of the parity of department benefits, reviewing and enhancing existing policies. | Provide additional benefits to all staff within the purview of the Department.<br><br>Review data of benefits usage by employee demographics and address any issues of lack of parity towards women or BIPOC staff. | 1. ASR has already taken this action. ASR currently provides and will continue to explore and provide additional benefits, such as telework, alternate work schedules, extended leaves to all staff, regardless of position, gender, age, or race.<br><br>2. Moving forward, ASR will track and conduct an annual assessment of benefit usage by employees, specifically benefits that are within the purview of ASR to identify any lack of parity towards women or BIPOC staff.<br><br>3. Additionally, ASR will advocate for any additional benefits that are managed centrally through DHR and HSS, and provide feedback to ensure parity in benefits towards women and BIPOC. | HR team | Intermediate (1-2 years) | Complete | N/A |
| 2.2.3 | Review the paid time off (PTO) policy annually and enhance it to value all religious and cultural holidays. | Comply with all City PTO rules, policies and procedures.<br><br>Staff awareness of use of PTO. | 1. ASR has already taken his action. ASR complies with all City PTO rules, policies and procedures.<br><br>2. Additionally, ASR will research and announce upcoming cultural holidays in its HR newsletter, and ensure that staff feel confident and comfortable in using their paid time off to observe these holidays. | HR team | Short term (3-6 months) | In Progress | HR team to research cultural holidays and communicate with staff |
| **Subsection 2.3: Create paths to promotion that are transparent and work to advance equity.** | | | | | | | |
| 2.3.1 | Determine standard factors considered for raises and promotions.  Make this information available to staff. | All staff are made aware of the applicable CSC Rules and MOU provisions related to raises and promotions. | 1. ASR has partially taken this action. ASR complies with all applicable CSC Rules and MOU provisions related to raises and promotions.<br><br>2. Moving forward, ASR will work to increase its communication to all staff about factors considered for raises and promotions as dictated by applicable CSC Rules and MOU provisions. ASR will also work to include more details about what factors hiring managers consider for promotions. | HR team | Short term (3-6 months) | In Progress | HR team to work with hiring managers to communicate expetations to staff |
| 2.3.2 | Develop a formal and transparent process for raises and promotions. | A formal and transparent process for raises and promotions has been implemented. | 1. ASR has partially taken this action. ASR complies with all applicable CSC Rules and MOU provisions related to raises and promotions.<br><br>2. Moving forward, ASR will work with Racial Equity Core Team to develop a formal and transparent process for raises and promotions as dictated by applicable CSC Rules and MOU provisions.  ASR will also work to include more details about what factors hiring managers consider for promotions. | REC team and HR team | Intermediate (1-2 years) | In Progress | HR team and REC team to develop process |

| Action # | Action Description | Indicators | Implementation | Lead | Timeline | Status | Resources Committed |
|---|---|---|---|---|---|---|---|
| 2.3.3 | Develop a process for "acting/interim" roles to avoid staff working these roles for extended periods of time without compensation. | An acting/interim process is developed.<br><br>Review of acting/interim assignments conducted. | 1. ASR will accomplish this objectives described in action # 2.3.6, to broaden this action description and develop a process that will create opportunities for staff to gain higher level experience through acting/interim assignments.<br><br>2. ASR HR will also review any current and future acting/interim assignments on a regular basis to ensure that the Department is not in violation of any applicable labor contracts. | PMO with REC team and HR | Intermediate (1-2 years) | In Progress | see 2.3.6 |
| 2.3.4 | Internally investigate key classifications with current "drop-offs" in employee diversity, such as Administrative Analyst Series (182X series).  Set forth strategies and training opportunities to support employee development to achieve mobility. | Increase in employee diversity in key classifications with "drop-offs." | 1. ASR will accomplish this objective as described in other action items in this plan that focus on "drop-offs" in employee diversity starting with department-specific classifications. ASR HR will work with the Racial Equity Core Team to develop strategies and training opportunities to support employee development to achieve mobility and advance equity at higher levels within the organization. | REC team and HR team | Intermediate (1-2 years) | In Progress | N/A |
| 2.3.5 | Revisit classifications that "dead end" employees, to create a clear upward path for continued employment opportunities with the City. | Program that provides more on-the-job training implemented.<br><br>MQs reviewed and amended to create more opportunities for applicants, hires and promotions.<br><br>Increase in underrepresented people of color in applicants, hires and promotions. | 1. ASR has already taken this action as described in action # 1.2.4, through the Department's 4260 trainee program and the amendment of the MQs to its 4213 and 4215 classifications. | Operations and HR team | Intermediate (1-2 years) | Complete | N/A |

| Action # | Action Description | Indicators | Implementation | Lead | Timeline | Status | Resources Committed |
|---|---|---|---|---|---|---|---|
| 2.3.6 | Develop an Assessor-Recorder Fellowship Program for entry level staff within the organization. Ensure the program allows for supervisory exposure. | Assessor-Recorder Fellowship program is developed. | 1. The department will look into creating a Fellowship Program for entry level staff to receive experience in different areas within the organization, including some supervisor experience. This will allow entry level staff to receive professional development and exposure to other roles within the organization.<br><br>2. The Project Management Office will work with Operations and Human Resources to develop a plan for the ASR Fellowship Program, including:<br>- Determine the type of application process<br>- Determine who will review and rate the applicants<br>- Timing of how long the role will be filled for<br>- What type of experience the fellows will receive<br><br>3. The department will look into the possibility of doing acting/interim assignments within certain divisions within the department. This includes if there are vacancies within lead roles, look at a process where we can rotate staff into lead positions. | PMO with REC team and HR team | Long Term (3-5 years) | Planning | Project Manager from PMO and Operations staff to design fellowship program |
| **Subsection 2.4: Actively pursue income equity, centering the experiences of women and people of color.** | | | | | | | |
| 2.4.1 | Conduct annual internal reviews of what salary step ASR is placing new hires on within each job classification. | Analysis is complete | 1. The HR Team will  conduct an analysis to assess what salary step ASR is placing employees on within each job classification at the time of hire and/or promotion. The analysis will look at all current employees. | HR team | Short term (3-6 months) | In progress | HR team to conduct analysis |
| 2.4.2 | Track what salary step ASR is placing new hires on, disaggregating data by ethnicity and gender. | Tracking system is implemented | 1. The HR Team will create a tracking system to track what salary step ASR is placing new hires and promotions on. The tracking system will include data on ethnicity and gender.<br><br>2. The Tracking System will include the justifications for how ASR is making decisions to place new hires at a higher range than first step. | HR team | Intermediate (1-2 years) | Planning | HR team to conduct analysis and design tracking system |

**Section 3. Discipline and Separation: The Path to Termination is Filled with Bias.  Managerial practices that surround employee evaluation, monitoring, warning, suspensions, and termination must be applied equally.  Employees of color, especially Black and Latinx employees, receive extra scrutiny from supervisors leading to worse performance reviews, missed promotion opportunities, and, oftentimes, termination.[1]  This additional scrutiny is a result of a biased feedback loop in which Black and Latinx employees are often seen as less skilled because of consistent or prolonged unemployment.  This cycle must be stopped.  Higher rates of corrective action and discipline negatively impacts a department's ability to successfully recruit, retain, and engage employees of color, specifically Black and Latinx employees.[2]  Thus, supervisors should be aware of their own biases, evaluations and reviews must be standardized, and, most importantly, managers should always center the needs of their employees.  Job expectations should be reasonable, clear, and gladly supplemented with opportunities for upskilling.**

**Department Goal: The Department will adhere to a discipline and separation process that does not adversely impact people of color. If there is harm due to racial inequity or bias, we will have tools to voice those issues so that trust can be restored.**

**Subsection 3.1: Create a clear, equitable, and accountable protocol for disciplinary actions.**

| Action # | Action Description | Indicators | Implementation | Lead | Timeline | Status | Resources Committed |
|---|---|---|---|---|---|---|---|
| 3.1.1 | Track disciplinary actions and analyze subsequent disaggregated data. Pay special attention to data pointing to biases against staff of color. | Tracking mechanism is created<br><br>Analyze data annually | 1. The HR Team will analyze data on disciplinary actions, including written warnings and up through termination. The data will go back 5 years and will be disaggregated by race and gender. Disciplinary actions will include vernal warnings through termination. | HR team | Intermediate (1-2 years) | Planning | HR team to track disciplinary actions |
| 3.1.2 | Track all types of separations and analyze subsequent disaggregated data. Pay special attention to data pointing to biases against staff of color. Feel free to include other approaches to addressing this area in your department. | Run report and analyze data annually | 1. The HR Team will analyze data who has left the department voluntarily. The data will go back 5 years and will be disaggregated by race and gender.<br><br>2. The department will begin conducting and documenting exit interviews when staff leave the department. The Core Team will help draft the questions for the exit interview template. | HR team | Intermediate (1-2 years) | Planning | HR team to conduct analysis, HR team and Leadership team to determine exit interview process |
| 3.1.3 | Train supervisors on bias and equitable and compassionate discipline and separation. | # of staff who attend training | 1. The department will provide compassionate discipline and separation training when the training is available from DHR. | HR team | Intermediate (1-2 years) | Planning | REC team to identify training, Supervisors an Managers to attend training |
| 3.1.4 | Implement alternative dispute resolution opportunities, such as mediation, to resolve interpersonal issues, thus reducing the need for separation or traditional disciplinary measures. Encourage a "scaled back" discipline process. | EAP information is shared with staff<br><br>HR participates in the DHR peer to peer training | 1. The department will continue to use the City's EAP to help with dispute resolution opportunities for our staff.<br><br>2. ASR will share information with staff about the City's EAP so that staff are aware of the program and how to use it. Information will be included in HR newsletters on a semi-annual basis.<br><br>3. The department will look into and utilize DHR's Peer Mediation training and work with the HR Team and Core Team to determine how to implement in ASR. | HR team | Short term (3-6 months) | Planning | HR team to determine the best resolution process beginning with the lowest stakes process (dispute resolution) and building to Peer mediation and EAP mediation. |
| 3.1.5 | Standardize discipline procedures and corrective actions to ensure that all employees receive the same level of discipline for a particular policy. | Comply with all applicable City rules, policies, procedures, best practices, and MOU provisions related to discipline and corrective actions.<br><br>Implement a tracking mechanism and review and analyze demographic data of employees disciplined. | 1. ASR has already taken this action. ASR complies with all applicable City rules, policies, procedures, best practices and MOU provisions related to discipline and corrective actions.<br><br>2. Moving forward, ASR will track, review and analyze discipline and corrective actions as mentioned in action # 3.1.1 to determine any disparity in demographics, specifically towards BIPOC employees. | HR team | Intermediate (1-2 years) | Complete | see 3.1.1 |

| Action # | Action Description | Indicators | Implementation | Lead | Timeline | Status | Resources Committed |
|---|---|---|---|---|---|---|---|
| Section 4. Diverse and Equitable Workforce: An Equitable Workplace Starts with Diverse Leadership. Fostering an organizational culture of inclusion and belonging means seeing oneself in every aspect of the workplace. When white men make up 85% of all senior executive and board members in America, it is difficult to imagine how women and people of color can see themselves in a leadership position.1 In general, a department's leadership determines multiple aspects of the workforce, who gets hired, where the money goes, what projects are greenlit. Thus, it is more likely that a diverse leadership that carries shared values with their staff, will better uplift the staff. In fact, all employees, both white and employees of color, benefit from a people of color-led department.2 Even the community will benefit because a diverse leadership will be better connected with the community, thus being able to create far more robust and innovative ways to support them. ||||||||
| Department Goal: The Department will work towards creating a diverse leadership team that fosters a culture of inclusion and belonging. We will attempt to remove biases and provide tools for staff, especially Supervisors and Managers, to be able to identify examples of institutional and interpersonal racism. ||||||||
| Subsection 4.1: Commit to developing a diverse and equitable leadership that will foster a culture of inclusion and belonging. ||||||||
| 4.1.1 | Adhere to a hiring and recruitment policy that generally aligns with the citywide racial equity framework and the departmental RE Action Plan. | % increase in diverse leadership | 1. HR will track what our leadership makeup is.<br><br>2. The HR Team will benchmark the data from the beginning of the Racial Equity Action Plan and compare it to data each year as the Equity Plan is implemented. Based on the number of positions that open up, this will be one indicator of the success of the Plan. | HR team | Long Term (3-5 years) | Planning | REC team to analyze leadership makeup annually |
| 4.1.2 | Commit to ongoing racial equity training and development for leadership. | # leadership staff trained on racial equity annually | 1. The department will establish a cycle on which managers and supervisors should attend the Implicit Bias DHR training and ensure that leadership is trained on an ongoing basis.<br><br>2. The Racial Equity Core team will continue to look for additional trainings that leadership should attend. This may include materials put together or developed by the Core Team, such as a library of online, self-paced videos.<br><br>3. With each budget cycle, the department will request additional training funds for racial equity trainings. | REC team and HR | Intermediate (1-2 years) | Planning | Finance to request budget for training, Leadership team to participate in trainings |
| 4.1.3 | Incorporate senior leadership demographics in the department annual report and/or other public-facing reporting. | Share demographics of ASR staff and senior leadership in the Department's Racial Equity Plan, and in compliance with DHR's policy on Age, Gender, and Race/Ethnicity Data. | 1. The ASR annual report does not include the demographics or makeup of ASR staff. Additionally, there are approximately only 19 staff that comprise ASR senior leadership staff. Demographic information of senior leadership cannot be shared without employees being identified by age, gender and race/ethnicity per DHR's policy on Age, Gender, and Race/Ethnicity Data.<br><br>2. This data will be suppressed and shown in aggregate with other populations for individuals that cannot be provided and included in our Racial Equity Action Plan instead. | Racial Equity Leads | Short term (3-6 months) | Complete | HR team to analyze data |

| Action # | Action Description | Indicators | Implementation | Lead | Timeline | Status | Resources Committed |
|---|---|---|---|---|---|---|---|
| 4.1.4 | Implement a simple process to submit anonymous input to senior leadership. Develop a plan to respond to such input. | # of staff that is aware of the process | 1. The Racial Equity Core Team will reach out to other departments and entities to determine how to implement an anonymous input mechanism for staff to communicate to senior leadership.<br><br>2. The plan will detail how to respond to the anonymous input and feedback. | REC team | Short term (3-6 months) | Planning | REC team to develop process |
| Section 5. Mobility and Professional Development: When an Employee's Needs are Met, so are the Department's Needs.  Our City workforce should center the needs of our employees. In order to do that, it is important to recognize having both the hard and soft skills needed to perform certain tasks is a form of privilege.  It is equally important to realize that employees of color are more likely to repeatedly prove their capabilities rather than being evaluated by their expected potential.1  By intentionally investing in the specific professional development of each staff, the department can uplift an employee's journey to developing new skills rather than scrutinizing for a lack of skills.  In essence, professional development through mentorship, training, and workshops create an internal pipeline retaining employees to one day fulfill leadership positions. | | | | | | | |
| Department Goal: The Department will continue to implement mechanisms within the office that create a career path for Assessor-Recorder positions. We will adopt a management approach that supports the success of people of color in their professional development and put measures in place that equalize setbacks they experience due to systemic and societal racism. | | | | | | | |
| Subsection 5.1: Offer professional and skill development opportunities that center individual goals first, then organizational needs. | | | | | | | |
| 5.1.1 | Require formal training for all staff regardless of full/part-time status or seniority. | Training request process and tracking of professional development trainings implemented. | 1. ASR will accomplish this objective as described in action # 5.1.2. ASR will develop a training request process and track all requests, including professional development trainings, which are currently not being tracked but can be found in each staffs' PPARs. | HR and Finance and REC team | Intermediate (1-2 years) | In Progress | see 5.1.2 |
| 5.1.2 | Formalize a process for staff to attend conferences.  Make clear processes and protocols for reimbursement, stipends, and payments. | # of staff who attended external conferences | 1. Review the department's current conference request and approval process and edit to make sure it is clearly written. This should include the types of trainings that people can take (i.e. city college, DHR trainings, etc.) so staff is aware of the opportunities available to them.<br><br>2. Ensure that the department's process is transparent by sharing updates in the HR Newsletter, creating a central location to save the documentation, and consistently reminding staff where it is located.<br><br>3. Request in the department's budget a subset of training specifically for professional development outside of the typical ASR appraisal certification courses and conferences.<br><br>4. Develop an application process for ASR staff to apply to this new subset of professional development training.<br><br>5. Have the Core Team evaluate the applications and select the employee(s) who will receive the training. | HR and Finance and REC team | Intermediate (1-2 years) * Items 4 and 5 subject to budget constraints | Planning | HR and Finance teams to review process with Operation, HR to communicate with staff, Finance to request budget and filter out a subset for specific growth and development |

| Action # | Action Description | Indicators | Implementation | Lead | Timeline | Status | Resources Committed |
|---|---|---|---|---|---|---|---|
| 5.1.3 | Offer opportunities for continual and extended learning.  Include in the annual budget. | Training request process and tracking of professional development trainings implemented. | . ASR will accomplish this objective as described in action # 5.1.2. ASR will develop a training request process and track all requests, including professional development trainings, which are currently not being tracked but can be found in each staffs' PPARs. | HR and Finance and REC team | Intermediate (1-2 years) | In Progress | see 5.1.2 |
| 5.1.4 | Encourage participation in professional development by sharing external opportunities that are related to the department's missions and goals.  Provide financial support for paid opportunities. | Training request process and tracking of professional development trainings implemented. | 1. ASR will accomplish this objective as described in action # 5.1.2. ASR will develop a training request process and track all requests, including professional development trainings, which are currently not being tracked but can be found in each staffs' PPARs. | HR and Finance and REC team | Intermediate (1-2 years) | In Progress | see 5.1.2 |
| 5.1.5 | Track professional and skill development and assess annually, specifically looking to target underrepresented staff of color. | # of staff taking processional and skill development trainings annually | 1. Create a tracking mechanism for the new professional development and application process described in 5.1.2.  2. Monitor who applies for the training / conference funds, who is approved, and who is denied. | HR team | Intermediate (1-2 years) | Planning | HR to create tracking system and monitor approvals/denials |
| **Subsection 5.2: Encourage collaboration between staff and supervisors that are consistent and thoughtful.** | | | | | | | |
| 5.2.1 | Develop an annual performance evaluation for all staff, part-time and full-time.  Highlight advancement opportunities. | Utilize annual performance evaluation process to promote and encourage advancement opportunities for all staff. | 1. ASR has already taken this action. ASR requires the annual performance evaluation for all staff, regardless of appointment status (e.g., PCS, PEX, TEX, etc.) or work schedule (e.g., full-time, part-time, as-needed). ASR will recommend incorporating advancement opportunities in each staff's annual performance evaluation. | HR team | Short term (3-6 months) | Complete | N/A |
| 5.2.2 | Create a mentorship program between senior and junior level staff. | Colleague Connect Program 2.0 is developed. | 1. The Core Team will work with HR to expand the department's Colleague Connect Program so that it more resembles a mentorship program between senior and junior level staff.  2. In updating the Program, the team will need to determine: - The audience - is it incoming staff or current staff mentorship? - The timing of program - The topics to cover - If there are trainings that mentors can take | REC team and HR | Long Term (3-5 years) | Planning | REC team, Operations staff |
| 5.2.3 | Invite staff within the department to attend brown bag sessions or information sessions on various career paths within the organization. | Brown bag sessions / information sessions area are held. | 1. The Core Team will work with Operations and Administration staff to prepare for and schedule two information sessions a year for internal staff and interns to attend. The informational sessions will speak about different career opportunities within and across the office. | REC team | Intermediate (1-2 years) | Planning | REC team |
| **Subsection 5.3: Ensure staff needs are centered and timely met in order to perform and excel at their jobs.** | | | | | | | |

| Action # | Action Description | Indicators | Implementation | Lead | Timeline | Status | Resources Committed |
|---|---|---|---|---|---|---|---|
| 5.3.1 | Create a process where staff can submit accommodation requests to the department's administration. The overall timeline process should be transparent and easily accessible. | Comply with all applicable City and State laws, rules, policies and procedures related to reasonable accommodations. | 1. ASR has already taken this action. ASR complies with all applicable City and State laws, rules, policies and procedures related to reasonable accommodations.<br><br>2. Additionally, ASR provides all staff with the ability to request alternate work schedules through the Department's Alternate Work Schedule (AWS) policy and flexible work schedules under the City's Family Friendly Workplace Ordinance. | HR team | Short term (3-6 months) | Complete | HR team |
| 5.3.2 | Incorporate an assessment of staff needs into the staff performance evaluation process. | Utilize annual performance evaluation and planning process to identify staff needs and address them as necessary. | 1. ASR has already taken this action. ASR's annual performance evaluation process affords staff the opportunity to self-evaluate their performance from the previous fiscal year and also provide input on their plan for the upcoming fiscal year's goals and objectives. | HR team | Short term (3-6 months) | Complete | N/A |
| 5.3.3 | Assign spaces for staff to take breaks and/or be in community with one another (e.g., department celebration, affinity groups). | Staff have a space to take breaks that creates a sense of community with one another. | 1. ASR has already taken this action. In 2018, ASR completed its renovation of its main office located in City Hall to accommodate more staff while creating fresh, new workstations for every employee, including a larger, more functional breakroom. Unfortunately, space inside City Hall is still limited and use of any additional breakrooms or spaces within City Hall are managed by Building Management under the City's Administrative Services Department and not ASR. | PMO | Short term (3-6 months) | Complete | N/A |
| 5.3.4 | Set up processes and open communication channels so management is available to respond to employees' non-work-related needs that contribute to overall work quality. Centering the most vulnerable individuals.<br><br>e.g. transportation stipends, exercise stipends, childcare, etc. | Remote employee engagement activities implemented.<br><br>Increase in staff participation in remote activities and events. | 1. ASR has already taken this action. ASR is sensitive and understanding to staff needs and well-being that may affect their job performance. Over the past year, ASR HR has focused on providing staff with various remote employee engagement activities and events using tools such as MS Teams channels and Zoom to promote well-being and to engage its employees while most ASR staff are working from home. More recently, ASR HR created an Events Calendar page to provide staff with an easy way to access events and important dates. ASR HR also provides staff with Employee Assistance Program (EAP) information in times of crisis or life changing events, and on occasion through our HR newsletter. | HR team | Short term (3-6 months) | Complete | N/A |

**Section 6. Organizational Culture of Inclusion and Belonging: Growing a Diverse Workforce is Just the First Step.** Employees must feel welcomed and included at every stage of their employment. Racial homogeneity is not only found in hiring and recruiting, it permeates throughout organizational culture, policies, and procedures. It also can take form as coded, traditional standards, such as "professionalism," that ultimately centers whiteness.1 This factor takes an immense mental health toll on underrepresented employees who do not feel like they belong. Departments must actively work to create a culture of inclusion and commit to ongoing assessment to uncover gaps in policies and procedures that create a culture of othering. Changes in organizational culture starts and continues with the needs of the employee. These needs are discovered by fostering intentional relationships with underrepresented employees, specifically women, trans employees, Black employees, indigenous employees, employees of color, and employees living with disabilities.

**Department Goals: The Department will embed the Racial Equity Action Plan into the organization's processes and procedures to foster an intentional culture of inclusion and belonging. We will emphasize collaboration in addressing existing and future anti-racist behavior to strengthen principles of fairness and equity and encourage respect for cultural differences within the office.**

| Action # | Action Description | Indicators | Implementation | Lead | Timeline | Status | Resources Committed |
|---|---|---|---|---|---|---|---|
| **Subsection 6.1: Foster an intentional organizational culture that is committed to inclusion and belonging.** | | | | | | | |
| 6.1.1 | Ensure that the department's mission, policies, and procedures reflect an ongoing commitment to an organizational culture of inclusion and belonging. | PPAR's updated<br><br>Job descriptions updated<br><br>Mission statement updated | 1. The department will incorporate the Racial Equity Action Plan goals into the department's:<br>- Performance Evaluation Template<br>- Core Values<br>- Job Descriptions<br>- Mission Statement | Public Affairs and HR | Short term (3-6 months) | Planning | HR and Public Affairs teams |
| 6.1.2 | Create a Racial Equity Team consisting of Racial Equity Leads committed to keeping the department accountable for reaching its RE Action Plan goals. | Regularly scheduled meetings with Team to implement REAP | 1. The department will identify who will lead the Racial Equity Action Plan process. The Leads will not only be a diverse group, but will represent the leadership in the department.<br><br>2. The department will identify a Racial Equity Core Team to represent staff within the department. The Core Team will not only be a diverse group, but will represent various divisions and positions within the office.<br><br>3. The Racial Equity Leads and Core Team will be responsible for creating the department's Racial Equity Action Plan, sharing information within the department, owning the implementation of the action items, and updating the Plan as time progresses. | Executive Leadership | Short term (3-6 months) | Complete | Executive Leadership, REC team |
| 6.1.3 | Develop a RE Action Plan that is updated regularly and available to the public. | Action Plan is published on website | 1. The Racial Equity Core Team will update the Racial Equity Action Plan based on new information from staff obtained through working groups and the all staff Racial Equity Survey. The department plans to update the Plan on an ongoing basis. | REC team | Long Term (3-5 years) | In progress | REC team |
| 6.1.4 | Regularly report to staff on RE Action Plan updates. | HR Newsletter is updated<br><br>Intranet page is created<br><br>Brownbag sessions are held | 1. Create a Racial Equity section in the Assessor's Office HR Newsletter. Core Team will be responsible for updating this section.<br><br>2. Hold semi-annual brownbag sessions for staff to attend. Give updates on the Racial Equity Action Plan. Receive feedback from participants and incorporate into the Plan.<br><br>3) Create a Racial Equity library on the department's Intranet, including the Department calendar to update events. | REC team | Long Term (3-5 years) | Planning | REC and HR teams |
| 6.1.5 | Support and provide spaces for affinity groups, prioritizing historically marginalized peoples. | HR Newsletter is updated with affinity group information | 1. Inform staff in the HR Newsletter that the department has space for affinity groups and state that the department supports staff creating their own non-exclusive groups.<br><br>2. Look into other affinity groups the City has formed and inform staff how they can participate. | HR team | Short term (3-6 months) | Planning | REC and HR teams |

| Action # | Action Description | Indicators | Implementation | Lead | Timeline | Status | Resources Committed |
|---|---|---|---|---|---|---|---|
| 6.1.6 | Have staff participate in trainings, conferences, and discussions that promote a wider understanding of racial equity. | Percentage of staff attending trainings on racial equity annually | 1. The department will establish a cycle on which staff should attend the Implicit Bias DHR training.<br><br>2. The Racial Equity Core team will continue to look for additional trainings.<br><br>3. With each budget cycle, the department will request additional training funds for racial equity trainings. | REC team, Finance and HR team | Intermediate (1-2 years) *Items pending budget constraints | Planning | REC team, Finance team to request budget, staff to attend trainings |
| 6.1.7 | Conduct an annual staff survey that assesses the department's commitment to an organizational culture of inclusion and belonging. | Annual staff survey administered.<br><br>Survey data analyzed to determine any positive or negative impacts of the implementation of the Department's Racial Equity Plan towards staff and Department culture. | 1. ASR has already taken this action. ASR has conducted and will continue to conduct a staff survey annually and analyze and assess the impacts that the Racial Equity Plan has made towards staff and the Department's commitment to an organizational culture of inclusion and belonging. | REC team and HR team | Short term (3-6 months) | Complete | REC team |
| 6.1.8 | Ensure that all art, decor, and design where staff work daily reflect racial and social diversity. | Art, décor and design in the office reflects racial and social diversity. | 1. Currently, ASR does not have any art, décor, or designs where staff work daily. Additionally, ASR is just a tenant to City Hall and must obtain approval from City Hall Building Management if it wanted to display any art, décor, or design in the office. With that said, ASR will ensure that any art, decor, or design displayed in the office will reflect racial and social diversity. | Public Affairs | Short term (3-6 months) | Complete | PMO and Public Affairs team |
| 6.1.9 | Create a Racial Equity Action Plan learning track for supervisors and managers so they are aware of what is in the Action Plan and support staff time spent on implementing the action items. | Meetings regarding the Racial Equity Action Plan with managers and supervisors are complete | 1. The Core Team will meet with Supervisors and Managers to review the ORE Framework and ASR Racial Equity Action Plan. Meetings will be used to answer any questions and concerns about the plan, provide updates to the plan, and to obtain buy-in from leadership within the department. | REC team | Short term (3-6 months) | Planning | REC team, Executive Leadership to identify and approve trainings, Supervisors and Managers to attend trainings |
| **Subsection 6.2: Develop internal communication processes and procedures that promote equity.** | | | | | | | |
| 6.2.1 | Regularly update departmental mailing lists to ensure that all staff receive communications. | Departmental mailing lists are updated.<br><br>All staff are reminded to update their personal contact information on a regular basis. | 1. ASR has already taken this action. ASR HR manages personnel changes and works with ASR IT to ensure that new hires have emails set-up by the time they start with the Department. ASR HR also updates its list of contacts that receive the HR newsletter to ensure that all staff have access to the latest HR updates. ASR HR also reminds staff to update their personal contact information in the SF Employee Portal to ensure that the Department can communicate with staff in case of emergencies. | HR team | Short term (3-6 months) | Complete | N/A |

| Action # | Action Description | Indicators | Implementation | Lead | Timeline | Status | Resources Committed |
|---|---|---|---|---|---|---|---|
| 6.2.2 | Ensure that all staff meetings center a diverse range of speakers and inclusive topics while offering space for staff engagement.  Be transparent about the speakers and topics. | Ongoing staff participation and feedback | 1. The Core Team will consult with ASR Leadership to suggest agenda items for ASR All Staff meetings. | REC team | Short term (3-6 months) | Planning | REC team |
| 6.2.3 | Create, maintain, and make available a space, physical and/or digital, for staff to share information. | Ongoing staff participation and feedback | 1. The department will establish an Employee Engagement Program. The Program will provide for virtual engagement  through Teams.<br><br>2. The Core Team will have feedback on the Employee Engagement Program on an ongoing basis.<br><br>3. Create a library of resources of Racial Equity Training materials and send to staff as part of the Employee Engagement Program. Allow staff to respond to the materials. | REC team and HR team | Intermediate (1-2 years) | Planning | HR team |
| **Subsection 6.3. Improve both physical and digital spaces to meet or exceed accessibility standards.** | | | | | | | |
| 6.3.1 | Create an accessibility protocol that is utilized across all events, communications, and departmental functions. | Accessibility checklist created. | 1. ASR will create an accessibility checklist to ensure that the Department takes into consideration access by staff and the customers it serves to all events, communications, and departmental functions. | Public Affairs and HR | Short term (3-6 months) | Planning | HR and Public Affairs team |
| 6.3.2 | Evaluate and improve on all physical spaces to meet or exceed accessibility standards taking into account staff and visitors with disabilities, seniors, and families.<br><br>e.g. elevator access, ramps, lactation rooms, scent-free cleaning products, gathering spaces, etc. | Staff have access to various part of the office in upper and lower floors. | 1. ASR has already taken this action. In 2018, ASR completed its renovation of its main office located in City Hall to accommodate more staff while creating fresh, new workstations for every employee, including a larger, more functional breakroom.<br><br>2. Additionally, ASR HR provides staff with an elevator key who have a medical condition that prevents them from using stairs to access parts of the office in upper and lower floors. ASR HR also provides staff with information to the location of designated lactation rooms or meeting rooms throughout City Hall. ASR maintains a scent-free workplace and addresses any issues by reminding staff individually or via the HR newsletter.<br><br>3. Unfortunately, space inside City Hall is still limited and use of any additional breakrooms or spaces within City Hall are managed by Building Management under the City's Administrative Services Department and not ASR. | PMO and HR team | Short term (3-6 months) | Complete | HR team to continuously monitor accessibility needs and work with building management to resolve |

| Action # | Action Description | Indicators | Implementation | Lead | Timeline | Status | Resources Committed |
|---|---|---|---|---|---|---|---|
| 6.3.3 | Evaluate and improve on all digital functions and communications to meet or exceed accessibility standards taking into account staff and visitors with disabilities.<br><br>e.g. plain-text messages, recordings with captions, accommodations for people with vision impairment, accommodations for deaf people, etc. | Accessibility information and accommodations are provided to staff and to applicants. | 1. ASR has already taken this action. ASR complies with all applicable City and State laws, rules, policies and procedures related to reasonable accommodations for its staff.<br>ASR HR also complies with hiring standards and practices, providing applicants with information on job announcements for requesting accommodations for taking a Civil Service Exam, or any part of the hiring process.<br><br>2. The Department has developed a robust language access plan and worked diligently to create accessible information sheets in multiple languages and in a culturally competent manner. The Department also circulates information in the mediums most available to people through an educational video series, a monthly e-newsletter, and digital workshops.<br><br>3. Additionally, ASR has set-up new ways of communicating and engaging with its staff, and accessibility to information shared through online tools such MS Teams, Zoom, and the Department's own Intranet page. | PMO and HR team | Short term (3-6 months) | Complete | N/A |
| 6.3.4 | Invest in translation services. | Provide in-house translation services. | 1. ASR has already taken this action. In 2016, ASR created its own departmental Language Access Ordinance Policy, which provides staff with access to various translation services, including bilingual telephone line, in-house certified bilingual staff, or multi-lingual information materials, when providing services to the public. ASR also utilizes its in-house certified bilingual staff to translate forms and documents that are provided to the public. | Public Affairs and HR | Short term (3-6 months) | Complete | N/A |
| 6.3.5 | Encourage individual forms of inclusive identity expression.<br><br>e.g. honoring gender pronouns, relaxing or modifying dress code, etc. | # of staff identifying their gender pronouns in their email signatures. | 1. ASR will promote and make staff feel comfortable in expressing their identity through sharing their gender pronouns in the email signatures or in dressing in cultural attire that complies with the Department's dress code. | HR team | Short term (3-6 months) | In Progress | HR team |

| Action # | Action Description | Indicators | Implementation | Lead | Timeline | Status | Resources Committed |
|---|---|---|---|---|---|---|---|
| 6.3.6 | Bring accessibility information and accommodations to the forefront rather than offering it upon request.  Accommodations can benefit other people besides the initial targeted group. | Accessibility information and accommodations are provided to staff and to applicants. | 1. ASR has already taken this action. ASR complies with all applicable City and State laws, rules, policies and procedures related to reasonable accommodations for its staff. ASR HR also complies with hiring standards and practices, providing applicants with information on job announcements for requesting accommodations for taking a Civil Service Exam, or any part of the hiring process.<br><br>2. The Department has developed a robust language access plan and worked diligently to create accessible information sheets in multiple languages and in a culturally competent manner. The Department also circulates information in the mediums most available to people through an educational video series, a monthly e-newsletter, and digital workshops.<br><br>3. Additionally, ASR has set-up new ways of communicating and engaging with its staff, and accessibility to information shared through online tools such MS Teams, Zoom, and the Department's own Intranet page. | HR team | Short term (3-6 months) | Complete | HR team |
| **Subsection 6.4: Expand the internal culture of belonging by fostering relationships with the external communities the department serves.** | | | | | | | |
| 6.4.1 | Incorporate a process to gather community feedback on projects, events, and communications that involve or will impact the community. | Outreach and feedback completed. | 1. ASR has already taken this action. Public outreach is conducted in diverse neighborhoods throughout the city where community members are already congregating, whether at community events, local libraries, or even PTA meetings.  In fiscal year 19-20, the Department organized 203 community engagements (community meetings, events, workshops, etc.) to provide information to financial services. | Public Affairs | Short term (3-6 months) | Complete | Public Affairs team |
| 6.4.2 | Find opportunities to invest into and support the communities the department serves. | Community specific workshops and events held. | 1. ASR has already taken this action. In 2017, the Department created the Family Wealth Forum to bring estate planning attorneys, tax experts, and certified financial planners together with Assessor's Office staff to offer free one-on-one counseling and multilingual workshops to local families. Since the inception of the Family Wealth Forum, the Department has hosted Forums and stand-alone workshops in every supervisory district in San Francisco, serving over 1,500 families, and working with community-based organizations to tailor each event to the neighborhood in which it will be hosted. | Public Affairs | Short term (3-6 months) | Complete | Public Affairs team |

# Appendix A Vulnerable Populations Assessment

The Office of the Assessor-Recorder administers the State's property tax laws and local transfer tax laws. As a result, the primary constituents are property owners and business owners who file business personal property statements. The office also maintains certain public records like marriage certificates.

| POPULATION | STAKEHOLDER ENGAGEMENT | % OF BUDGET | $ OF BUDGET | CRITICAL ISSUES | ACCOMPLISHMENTS |
|---|---|---|---|---|---|
| 300+ annually | Provide Credible Financial Education | 0.14% | $40,000 | Lack of access to credible financial information and affordable financial services, such as estate planning; economic insecurity; vulnerable to fraudulent or predatory financial practices. | We believe credible financial information and assistance are more important than ever now in the midst of an active global pandemic. This is true especially for immigrant families and families of color who have been disproportionately impacted by COVID-19. As a result, we have transitioned our signature financial education program, Family Wealth Forum (FWF) to an online resource. Over 300 participants signed up for our July 18, 2020 event.<br><br>Centered around helping individuals and families build financial resilience during COVID, the July 18 FWF featured topics that were submitted by registrants to the event and from finance professionals based on issues they see on the ground:<br><br>- Tips for personal finance (debt management, what it means to pull money from retirement accounts, tax filings, etc.)<br><br>- How to get started on estate planning - given health concerns around COVID-19, it is even more critical to plan and be prepared for whatever may |

| | | | | | come (trust, wills, advanced health directives, etc.) |
|---|---|---|---|---|---|
| 3,000 | Protect Language Access | 0.03% | $10,000 | Constituents with language barriers have difficulty understanding tax laws and implications for their finances. | With our physical offices closed, immigrant communities and communities of color with language barriers and those who cannot easily access the internet may not be aware that our office is still operating and providing full services remotely.

To respond, we have added multilingual voice greetings to our public service phone lines and auto-replies to our public service emails. Our website, redesigned a couple years ago, already includes multilingual webpages for easy access to answers to commonly-asked questions.

We will continue to monitor language access through utilization data collected from translation services, through click-throughs on our website of translated documents and pages and through surveys included in our office's annual property and business owner mailings which helps inform how to continue our translation and interpretation work. |
| Unknown | Managing Public Access to Physical Offices | Unknown | Unknown | Members of the public, especially those without internet access, regularly come to City Hall for assistance. In addition, many people from vulnerable populations come in person to our office to record documents, obtain copies of marriage licenses or to file mandatory business property statements for their small businesses. These in-person services became unavailable, with no real | The Assessor-Recorder made immediate arrangements to have all phone lines shifted to 311, to ensure responsiveness for all public inquiries. We also immediately put new verification procedures in place to receive state approval to receive digital submissions from taxpayers through email. We shifted to using the US Mail for receiving and issuing documents that were handled in person and have worked with City Hall Building Management to install a drop box for documents; a skeleton crew has been assigned to come to work in City Hall to receive physical documents, record and issue |

| | | | | | |
|---|---|---|---|---|---|
| | | | | notice, when the Shelter in Place Order was issued. | certified copies of public records, including marriage licenses, on a timely basis. We worked with the County Clerk so marriage license copies for weddings that were conducted on an urgent basis (usually so people could retain health benefits, protect immigration status, or gain spousal rights for hospitalized partners) could quickly receive certified copies of marriage licenses. The rest of staff shifted to a remote work environment and are supported by the office's IT team in ensuring we are able to continue all of our assessment and recording work. Despite this significant operational shift, the office successfully closed the roll on-time, which resulted a 5.6% increase in property tax revenues to the City for the coming fiscal year. |
| Unknown | Maintaining Core Functions Vital for Public Services | | | Our Office's primary function is administering the State's property taxation and recording functions and local transfer tax laws.  Cumulatively our work generates $3.3 billion in annual revenues for City and County of San Francisco services and for public education. We also grant roughly $16 billion in assessed value exemptions annually for nonprofit organizations. And although we are not reporting these contributions in the ORE survey, we believe it is critical we recognize the importance of our Office's work in supporting local programs for our City's most vulnerable populations. | Because our Office's work has a significant impact on local resources to fund vulnerable populations, one of the most direct ways in which we advance equity is to focus on delivering our core functions well.  In the coming fiscal year we will continue to ensure fair taxation through our work standardizing procedures and through programs like the transfer tax audit program which holds taxpayers accountable to truthfully report transfer tax values – the program has uncovered $40 million in underreported transfer taxes so far.  We also expect a significant increase in assessment appeals to be filed this year and we will need to ensure alignment of resources to defend against unjust reductions.  The Office is also committed to continuing to outreach and provide financial information through the FWF and community meetings |

# Appendix B Employee Racial Equity Survey and Responses

**THOUGHTS AND UNDERSTANDING**

1   I think it is valuable to examine and discuss the impacts of race and racial inequity.
2   I have a basic understanding of concepts related to racial equity.
3   I feel comfortable talking about race and equity in my personal life.
4   I feel comfortable talking about race and equity within my work setting.
5   I feel comfortable expressing my identity at work.
6   I feel competent in my interactions with people of other races.
7   I have positive relationships with employees in my department that are of a different race/ethnicity.
8   I know how to identify examples of institutional racism (i.e., when organizational programs or policies work better for white people than for people of color, usually unintentionally or inadvertently).

**RECRUITMENT, HIRING, PROMOTION AND TRAINING**

9   The City's Civil Service Merit System rules (e.g., applicant name and education masking, civil service exams, civil service eligible lists, certification rules such as rule of 3 or rule of 10, etc.) ensures that recruitment processes are equitable and help to create a diverse and inclusive workforce.
10  The City's Civil Service hiring and promotive processes are fair and equitable.
11  My department's recruitment process is equitable and helps to create a diverse and inclusive workforce.
12  My department has equitable hiring processes.
13  Opportunities for promotion in my department are accessible to everyone equitably regardless of race or ethnicity.
14  My department provides equal opportunities for training and development to everyone.
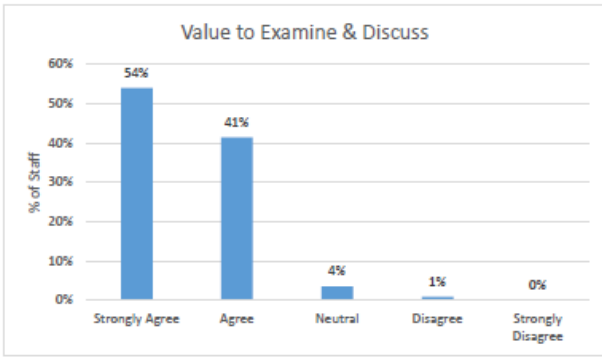
**DEPARTMENT EXPERIENCE, LEADERSHIP AND TOOLS**

15  My department is committed to racial equity.
16  My department has a diverse workforce.
17  I observe/have observed racial tension between employees in my department.
18  Opportunities to meet with other staff within my affinity group would be valuable.
19  Addressing racial disparities and racial equity should be a priority for the Department.
20  Leadership in my department support discussions about institutional racism.
21  In my department supervisors and managers hold all employees to the same workplace expectation and disciplinary standards no matter the employee's racial identity.
22  My department provides support for resolving workplace issues involving institutional racism.
23  My department provides me with the resources and tools I need to do my job.
24  My department should create a racial equity plan.
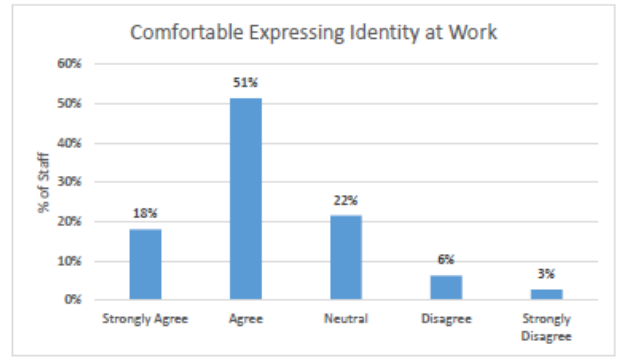
**YOUR INVOLVEMENT IN RACIAL EQUITY**

25  I need more tools or training to address institutional racism in the workplace.
26  I want to be more actively involved in advancing racial equity in my workplace.
27  I would become more active in advancing racial equity if… (Mark all that apply)

s

# 1. Please provide a response to the following statements regarding your thoughts & understanding about racial equity.
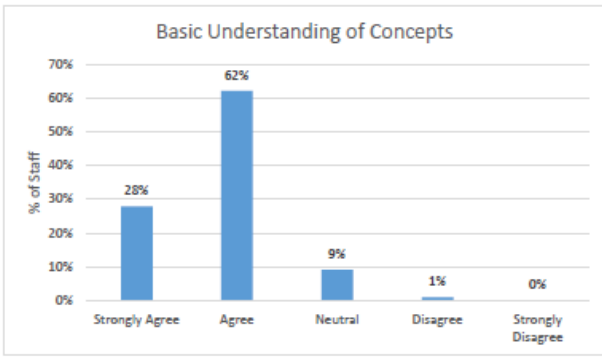
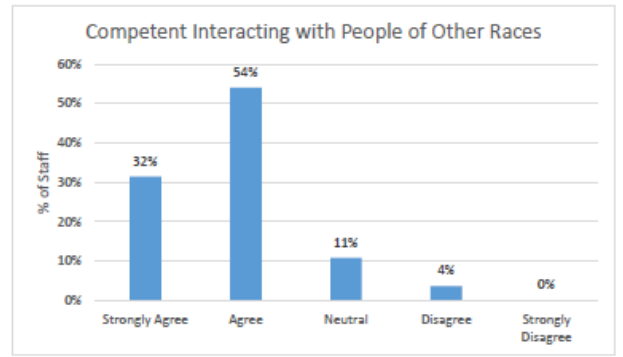**Q. 1 - I think it is valuable to examine and discuss the impacts of race and racial inequity.**

### Value to Examine & Discuss

% of Staff

- Strongly Agree: 54%
- Agree: 41%
- Neutral: 4%
- Disagree: 1%
- Strongly Disagree: 0%

**Q. 5 - I feel comfortable expressing my identity at work.**

### Comfortable Expressing Identity at Work

% of Staff

- Strongly Agree: 18%
- Agree: 51%
- Neutral: 22%
- Disagree: 6%
- Strongly Disagree: 3%

**Q. 2 - I have a basic understanding of concepts related to racial equity.**

### Basic Understanding of Concepts

% of Staff

- Strongly Agree: 28%
- Agree: 62%
- Neutral: 9%
- Disagree: 1%
- Strongly Disagree: 0%

**Q. 6 - I feel competent in my interactions with people of other races.**

### Competent Interacting with People of Other Races

% of Staff

- Strongly Agree: 32%
- Agree: 54%
- Neutral: 11%
- Disagree: 4%
- Strongly Disagree: 0%

**Q.3 - I feel comfortable talking about race and equity in my personal life.**

### Comfortable Talking About Race & Equity in Personal Life

% of Staff

- Strongly Agree: 26%
- Agree: 61%
- Neutral: 8%
- Disagree: 5%
- Strongly Disagree: 0%

**Q. 7 - I have positive relationships with employees in my department that are of a different race/ethnicity.**

### Positive Relationships with Different Race/Ethnicity in Dept

% of Staff

- Strongly Agree: 41%
- Agree: 55%
- Neutral: 4%
- Disagree: 0%
- Strongly Disagree: 0%

**Q. 4 - I feel comfortable talking about race and equity within my work setting.**

### Comfortable Talking About Race & Equity at Work

% of Staff

- Strongly Agree: 9%
- Agree: 36%
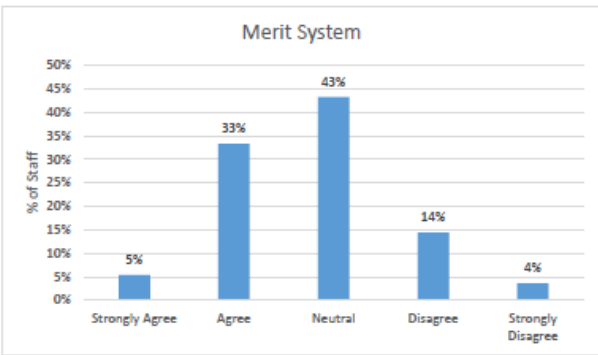- Neutral: 34%
- Disagree: 18%
- Strongly Disagree: 3%

**Q. 8 - I know how to identify examples of institutional racism (i.e., when organizational programs or policies work better for white people than for people of color, usually unintentionally or inadverten...**
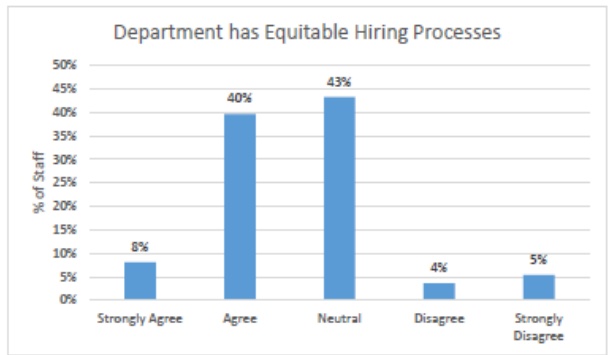
### Know How to ID Institutional Racism

% of Staff

- Strongly Agree: 19%
- Agree: 36%
- Neutral: 32%
- Disagree: 12%
- Strongly Disagree: 1%

**2. Please provide a response to the following statements regarding recruitment, hiring, promotion and training as it relates to racial equity.**
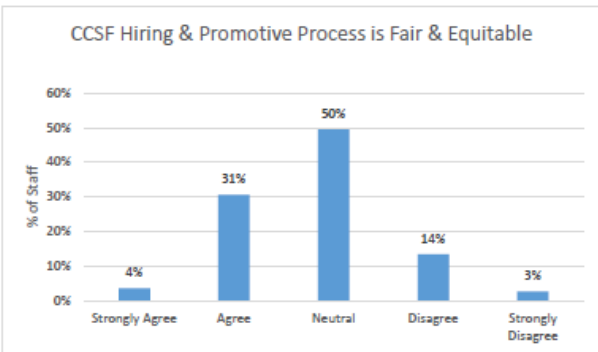
**Q. 9 - The City's Civil Service Merit System rules (e.g., civil service exams, civil service eligible lists, certification rules such as rule of 3 or rule of 10, etc.) ensures that recruitment processes...**
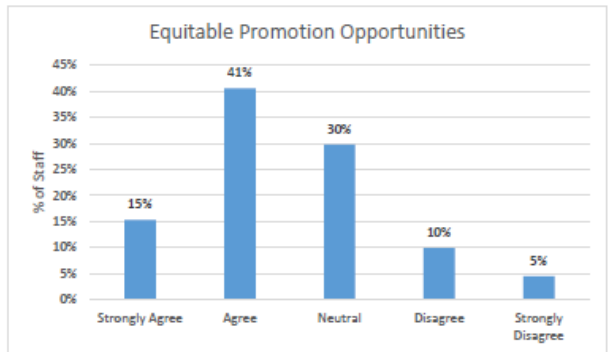
### Merit System

| Strongly Agree | Agree | Neutral | Disagree | Strongly Disagree |
|---|---|---|---|---|
| 5% | 33% | 43% | 14% | 4% |

**Q. 10 - The City's Civil Service hiring and promotive processes are fair and equitable.**

### CCSF Hiring & Promotive Process is Fair & Equitable

| Strongly Agree | Agree | Neutral | Disagree | Strongly Disagree |
|---|---|---|---|---|
| 4% | 31% | 50% | 14% | 3% |

**Q. 11 -My department's recruitment process is equitable and helps to create a diverse and inclusive workforce.**

### Department's Recruitment is Equitable & Helps Create a Diverse & Inclusive Workforce

| Strongly Agree | Agree | Neutral | Disagree | Strongly Disagree |
|---|---|---|---|---|
| 9% | 43% | 38% | 5% | 5% |

**Q. 12 - My department has equitable hiring processes.**

### Department has Equitable Hiring Processes

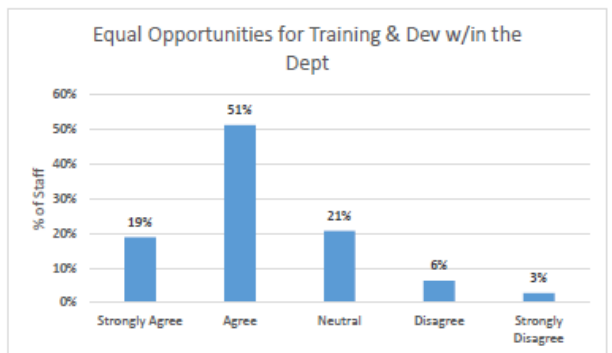| Strongly Agree | Agree | Neutral | Disagree | Strongly Disagree |
|---|---|---|---|---|
| 8% | 40% | 43% | 4% | 5% |

**Q. 13 - Opportunities for promotion in my department are accessible to everyone equitably regardless of race or ethnicity.**

### Equitable Promotion Opportunities

| Strongly Agree | Agree | Neutral | Disagree | Strongly Disagree |
|---|---|---|---|---|
| 15% | 41% | 30% | 10% | 5% |

**Q. 14 - My department provides equal opportunities for training and development to everyone.**

### Equal Opportunities for Training & Dev w/in the Dept

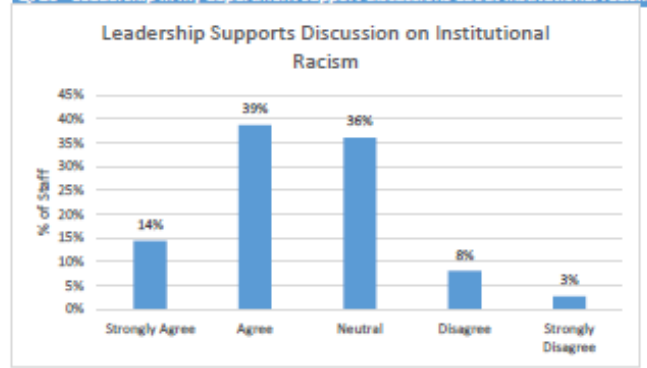| Strongly Agree | Agree | Neutral | Disagree | Strongly Disagree |
|---|---|---|---|---|
| 19% | 51% | 21% | 6% | 3% |

# 3. Please provide a response to the following statements regarding your department experience, leadership, and tools as it relates to racial equity.
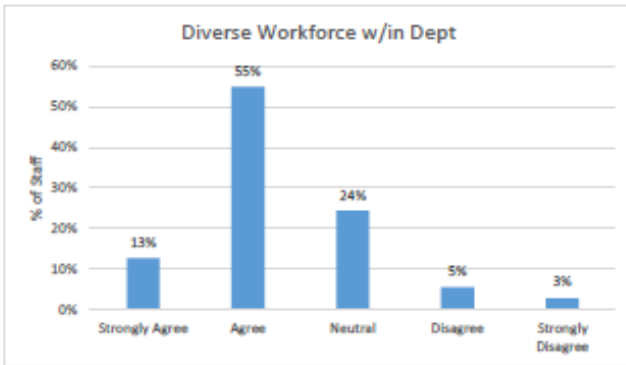
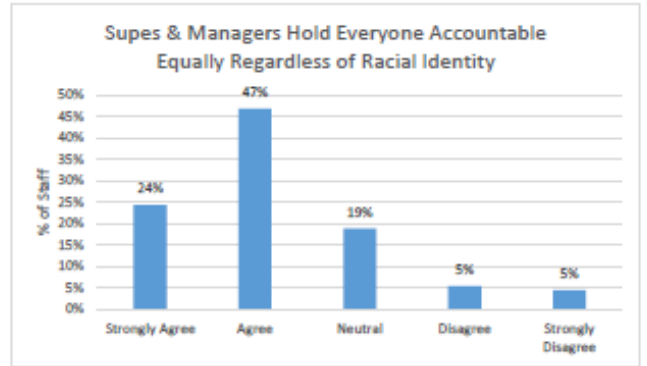**Q. 15 - My department is committed to racial equity.**

### Dept Committed to Racial Equity

| Strongly Agree | Agree | Neutral | Disagree | Strongly Disagree |
|---|---|---|---|---|
| 18% | 48% | 27% | 5% | 3% |

**Q. 16 - My department has a diverse workforce.**

### Diverse Workforce w/in Dept

| Strongly Agree | Agree | Neutral | Disagree | Strongly Disagree |
|---|---|---|---|---|
| 13% | 55% | 24% | 5% | 3% |

**Q. 17 - I observe/have observed racial tension between employees in my department.**

### Racial Tension in the Dept

| Strongly Agree | Agree | Neutral | Disagree | Strongly Disagree |
|---|---|---|---|---|
| 1% | 19% | 23% | 40% | 17% |

**Q. 18 - Opportunities to meet with other staff within my affinity group (other staff with whom you share a common faith, gender, sexual orientation, and ethnic or racial identity, etc.) would be valuable.**

### Affinity Group Opportunity

| Strongly Agree | Agree | Neutral | Disagree | Strongly Disagree |
|---|---|---|---|---|
| 5% | 38% | 48% | 8% | 2% |

**Q. 19 - Addressing racial disparities and racial equity should be a priority for the Department.**

### Dept Priority to Address Racial Disparity & Racial Equity

| Strongly Agree | Agree | Neutral | Disagree | Strongly Disagree |
|---|---|---|---|---|
| 23% | 49% | 21% | 5% | 3% |

**Q. 20 - Leadership in my department support discussions about institutional racism.**

### Leadership Supports Discussion on Institutional Racism

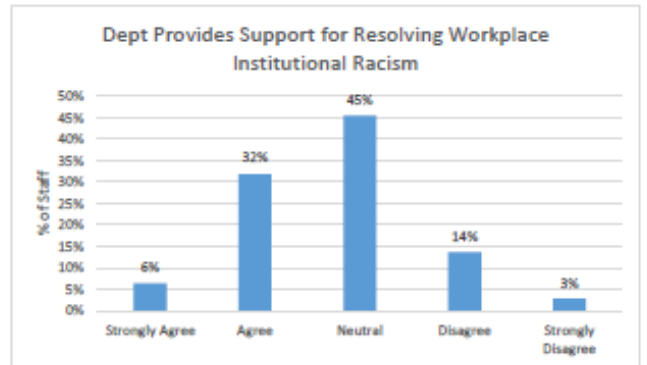| Strongly Agree | Agree | Neutral | Disagree | Strongly Disagree |
|---|---|---|---|---|
| 14% | 39% | 36% | 8% | 3% |

**Q. 21 - In my department, supervisors and managers hold all employees to the same workplace expectation and disciplinary standards no matter the employee's racial**
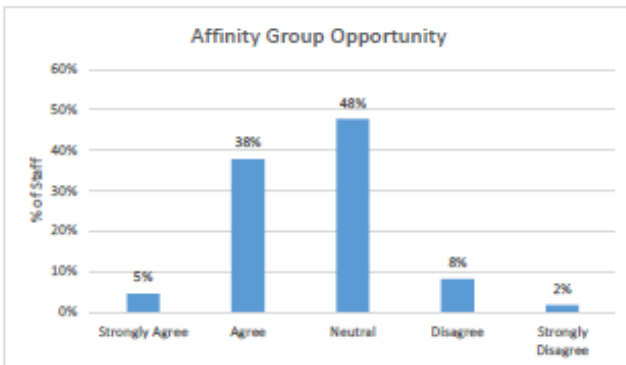
### Supes & Managers Hold Everyone Accountable Equally Regardless of Racial Identity

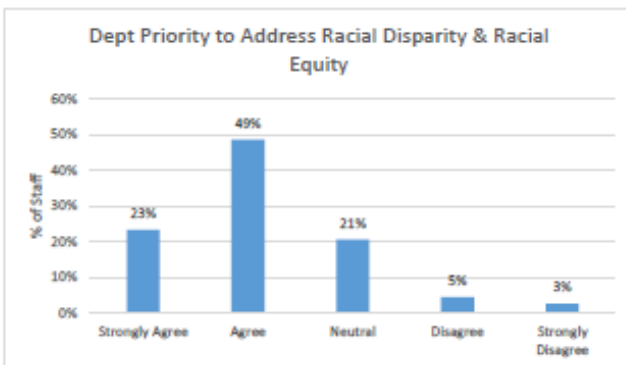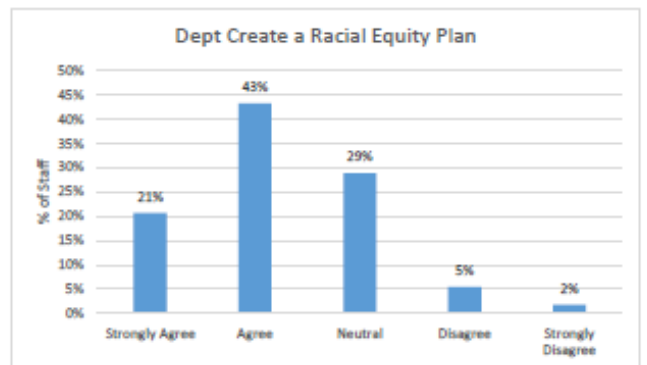| Strongly Agree | Agree | Neutral | Disagree | Strongly Disagree |
|---|---|---|---|---|
| 24% | 47% | 19% | 5% | 5% |

**Q. 22 - My department provides support for resolving workplace issues involving institutional racism.**

### Dept Provides Support for Resolving Workplace Institutional Racism

| Strongly Agree | Agree | Neutral | Disagree | Strongly Disagree |
|---|---|---|---|---|
| 6% | 32% | 45% | 14% | 3% |

**Q. 23 - My department provides me with the resources and tools I need to do my job.**

### Dept Provides Resources/Tools To Do Job

| Strongly Agree | Agree | Neutral | Disagree | Strongly Disagree |
|---|---|---|---|---|
| 22% | 61% | 12% | 4% | 2% |

**Q. 24 - My department should create a racial equity plan.**

### Dept Create a Racial Equity Plan

| Strongly Agree | Agree | Neutral | Disagree | Strongly Disagree |
|---|---|---|---|---|
| 21% | 43% | 29% | 5% | 2% |

## 4. Please provide a response to the following statements regarding your involvement as it relates to racial equity.

**Q. 25 - I need more tools or training to address institutional racism in the workplace.**



More Tools/Training to Address Institutional Racism at Work

| Response | % of Staff |
|---|---|
| Strongly Agree | 12% |
| Agree | 35% |
| Neutral | 37% |
| Disagree | 13% |
| Strongly Disagree | 4% |

**Q. 26 - I want to be more actively involved in advancing racial equity in my workplace.**



Actively Involved in Advancing Racial Equity

| Response | % of Staff |
|---|---|
| Strongly Agree | 8% |
| Agree | 42% |
| Neutral | 45% |
| Disagree | 5% |
| Strongly Disagree | 1% |