

City of Seattle
Racial Equity Toolkit (RET) Summary Sheet: Cover Sheet and Questions

Department/Office: Seattle Public Utilities

Name of policy, program, etc. analyzed: New Customer Information System (NCIS) Key Policies

Names and titles of key staff that led this RET process: Steve Hamai (SPU Environmental Justice and Service Equity Advisor), David Marshall (SPU NCIS Project Advisor), and Marcella Wilson (SPU Environmental Justice and Service Equity Senior Planner), and Shanna Crutchfield (SCL Race and Social Justice Program Manager)

Dates of RET process (e.g., 8/2015 – 10/2015): 3/2015 - 8/2015

1. List the racial equity outcome(s) that you set in Step 1 of the RET process. (Max 300 characters)

NCIS is the new SCL and SPU shared customer billing and account software. NCIS launch provides an opportunity to align various policies and procedures between the departments. Eight key decisions were pre-identified by the NCIS project core team as having the potential for inequitable customer impacts. The RET was applied to these key decisions. An equitable outcome would be that policies will not have a disproportionate impact on low income customers of color.

2. Which stakeholders (groups and/or key individuals) did you engage in this RET? In what ways did you engage them? (Max 600 characters)

In addition to key staff who provided facilitation, the following staff were involved in applying the RET to NCIS Key Decisions:

- Robert Bauer (SPU Customer Service Branch)
- Marcus Jackson (NCIS Strategic Advisor Functional Team - SPU)
- Shirley Mah (NCIS Strategic Advisor Functional Team - SCL)
- Kristi Mauck (SCL Internal Audit Manager)
- Gayle Shimizu (NCIS Strategic Advisor Change Management - SCL)

3. Please describe up to five key benefits and/or burdens for people of color of this policy, program, project, or other decision, which the RET process helped you to identify or confirm. (Max 300 characters each)

- Alignment of policies in regard to issues like utility shut offs, credit and collections, with a default to the most forgiving current practice
- Targeted communication of select policies to limited English speaking customers
- Written, clear guidelines for select program enrollment eligibility
- Improved leveraging of existing programs designed to assist utility customers who have difficulty managing the costs of utility services
- Use of GIS to help determine impacts of policy changes with customers

4. Please describe up to five key actions – things that you will do differently or begin to do now – of this policy, program, project, or other decision, which will increase opportunity and/or minimize harm for people of color. (Max 300 characters each)

- Develop targeted communication plans and non-traditional methods to effectively reach those customers most impacted by policy changes

- Make routine use of GIS and analyze existing data to help staff determine if inequitable impacts to customers are resulting from service changes
- Create a business process and seek approval to begin routine collection of demographic customer data

5. How will leadership ensure implementation of the actions described in question 4? (Max 800 characters)

A summary memo listing specific follow up items and recommended next steps was developed by the team. However, a meeting to review the summary toolkit findings with the co-project leads and executive sponsors (from SCL and SPU) has not been scheduled due to an overall delay in getting NCIS launched. We hope to have this meeting within the first half of 2016. Nonetheless, a few of the work items (e.g. integration of GIS-mapping) are currently in development and the staff on these efforts and have included RSJI-Service Equity Subject Matter Experts from SCL and SPU.

6. How have/will you report back to your stakeholders? (This includes the people who were directly engaged in this RET process, those who will be affected by decisions made, and other departments or divisions impacted by the RET findings and the actions described in question 4.) (Max 800 characters)

The SPU Customer Service Branch is developing their own equity team, identifying opportunities to apply the RET, and follow up on recent RET-related activities. Follow up on NCIS items will be included on their work plan.

7. What additional racial equity issues did this RET reveal? Consider how these unresolved issues present opportunities for structural transformation (i.e. working across departments, and with other institutions and sectors to achieve racial equity). (Max 800 characters)

- Future need/opportunity to collect demographic data from customers (would help create a customer baseline profile, determine whether racial inequity was occurring as a result of policy or service changes, and determine the effectiveness of future actions to address disparities)
- A need to obtain initial cross departmental executive buy-in and expectation-setting
- A mechanism (or time) to build minimum levels of RSJ competencies among all those participating in the RET process
- A clear pathway for cross department accountability on follow up items (after application of the RET)
- Clear cross department expectations on continuing discussions of RSJI-related analysis and impacts