

From Starting to Sustaining: What Actions Are Local Governments in North Carolina Taking to Advance Diversity, Equity, and Inclusion (DEI)?

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Executive Summary

Many local governments are recognizing the importance of building more diverse, equitable, and inclusive workplaces and communities. Municipal and county administrators and elected officials are increasingly interested in learning about the steps they can take and the steps other local governments are taking. In response, the coauthors conducted a study to understand how North Carolina local governments were embedding diversity, equity, and inclusion (DEI) principles and practices in their organizations.

Twenty-three actions commonly implemented by governments working to advance DEI were identified. A survey was sent to 543 North Carolina county and municipal managers and administrators in July and August 2021 to ask which of the twenty-three actions they had implemented or were planning to implement in the next fiscal year. Forty-nine jurisdictions responded to the survey for a 9 percent response rate. Follow-up interviews were conducted with representatives of the three municipalities that reported taking more than half of the actions on the survey.

The survey findings show that local governments of various sizes and in different areas of the state were implementing and planning to implement a range of actions to advance DEI. The most frequently reported current actions included: instituting DEI-related training for staff, evaluating human resources policies related to DEI, creating an internal DEI-related task force made up of staff, and establishing department-specific DEI initiatives.

The interviews indicated that the focus and progression of DEI efforts varied based on each jurisdiction's goals. While interviewees reported different challenges, such as senior-staff and elected-leadership turnover and staff pushback on different aspects of their work, all agreed that continued education, leadership support, and staff "DEI champions" were vital to initiating and sustaining DEI work.

In terms of future DEI efforts, both the surveys and interviews showed a continued emphasis on staff training along with an increased focus on measuring the impact and success of DEI work.

Introduction

Over the past several years, national and state managers' associations have made significant efforts to inform and assist members' efforts to further diversity, equity, and inclusion (DEI). In 2005, the National Academy of Public Administration adopted social equity as a fourth pillar of the discipline, along with efficiency, effectiveness, and economy. Similarly, the International City/County Management Association (ICMA) codified its commitment to equity and inclusion in the 2017 update of its strategic plan.¹ In April 2023, ICMA revised its Code of Ethics to "better integrate" a commitment to equity and social justice into its tenets and guidelines.² Moreover, since 2021, the North Carolina City and County Management Association (NCCCMA) has

1. ICMA's strategic plan is available at <https://icma.org/documents/icma-strategic-plan-envision-icma> and is also discussed on its interactive historical timeline at "ICMA's Path to Building a Diverse and Inclusive Profession" at <https://icma.org/icmas-path-building-diverse-and-inclusive-communities-and-profession>.

2. The association's Code of Ethics may be found at <https://icma.org/page/icma-code-ethics-review-focusing-diversity-equity-and-inclusion>.

explored DEI as a seminar topic at its biannual convenings, demonstrating local administrators' interest in the topic. As municipal and county managers consider their roles in advancing DEI within their organizations and communities, it is important to understand how local governments are actively addressing these complex issues.

The purpose of this bulletin is to summarize a research study that explored two questions: (1) what DEI efforts are currently being implemented by local governments in North Carolina and (2) what DEI efforts are North Carolina local governments planning to implement in the next fiscal year? To answer these questions, the coauthors surveyed municipalities and counties, collected publicly available demographic data for the jurisdictions that responded to the survey, and conducted interviews with three jurisdictions. Additionally, the bulletin discusses motivations, challenges, and opportunities for implementing DEI as discussed in public administration literature and reported by the interviewees.

Defining Diversity, Equity, and Inclusion

DEI is a broad concept, often used to describe a range of activities from workplace training to deep transformation of organizational culture and practice. Although the words *diversity*, *equity*, and *inclusion* have arguably become buzzwords, there remains an inconsistent understanding of what each word means and how DEI should be understood in a public administration context. This bulletin borrows the definitions used by the National Association of Counties (NACo).³

Diversity describes the “presence of different and multiple characteristics that make up individual and collective identities, including race, gender, age, religion, sexual orientation, ethnicity, national origin, socioeconomic status, language, and physical ability.”⁴ Traditional diversity management approaches focus on recruiting, hiring, retaining, and promoting a heterogeneous mix of employees through strategies including mentoring programs, alternative work arrangements, and family-friendly policies.⁵ *Equity* is the “process of identifying and removing . . . barriers that create . . . disparities in . . . access to resources and means, and the achievement of fair treatment and opportunities to thrive.”⁶ Strategies to advance equity include using a specific tool to integrate equity in organizational decision-making and changing organizational policies that are contributing to inequities.⁷ *Inclusion* means creating an environment in which every person and group is and feels “welcomed, respected, supported and valued to participate fully.”⁸ Inclusion-focused approaches include celebrating differences, asking for and listening to feedback, and involving employees and stakeholders in decision-making.⁹ In the context of public administration and management, it should be noted that these terms can apply internally to an organization (e.g., hiring practices, organizational culture) and externally to the community it serves (e.g., public health, hunger, poverty).

3. Nakintu and Bitanga-Isreal, “Diversity, Equity and Inclusion.”

4. Ibid.

5. Ivancevich and Gilbert, “Diversity Management”; Sabharwal, “Is Diversity Management Sufficient?”

6. Nakintu and Bitanga-Isreal, “Diversity, Equity and Inclusion.”

7. Nelson and Brooks, “Racial Equity Toolkit: An Opportunity to Operationalize Equity.”

8. Ibid.

9. Brimhall and Mor Barak, “The Critical Role of Workplace Inclusion”; Sabharwal, “Is Diversity Management Sufficient?”; Shore et al., “Inclusion and Diversity in Work Groups.”

Furthermore, *equality* and *equity* are sometimes used interchangeably but convey significantly different ideas, and the implementation of one versus the other can lead to dramatically different outcomes for people from different social groups. At the most basic level, equity is about fairness, while equality is about sameness. *Equality* means that “each individual or group of people is given the same resources or opportunities.”¹⁰ On the other hand, *equity* recognizes that individuals or groups of people have different circumstances, and therefore the allocation of resources and opportunities may need to be different for individuals or groups to reach an equal outcome.¹¹

Motivations for Implementation

While heightened awareness and new professional standards may be accelerating efforts to advance DEI, there are other factors influencing local governments. Three primary motivations cited in the literature as reasons to undertake DEI work include demographic changes, legal compliance, and organizational effectiveness.

Demographic Changes

One reason to advance DEI is to respond to demographic changes among a jurisdiction’s population.¹² The 2020 Census ranks North Carolina as the fifteenth fastest-growing state in the nation with a 9.5 percent population increase over the last decade.¹³ More specifically, from 2010–20, the percentage of North Carolinians of color rose from 32 to 40 percent of the total population, with the largest increase among Hispanic/Latinx residents. In addition, based on the 2020 Census results, researchers now estimate that by 2035, North Carolina residents over the age of sixty-five will outnumber those under eighteen. This growth follows a pattern of urbanization among the state’s largest metropolitan centers, including the Charlotte-Mecklenburg, Piedmont, and greater Triangle regions, as well as of significant emigration from forty-three counties primarily in the Northeast and Sandhills regions.

Scholars argue that these examples of racial/ethnic and age diversification can be a contributing factor in the implementation of DEI efforts to better serve the community.¹⁴ For example, as a jurisdiction’s population becomes older or more racially and ethnically diverse, local government administrators may explicitly incorporate equity into their decision-making to help them more effectively meet basic needs, resolve conflict, promote participation, and develop community partnerships.¹⁵ Furthermore, a more diverse population may lead to more community members advocating to embed DEI principles in public service and seeking to hold their local governments accountable.¹⁶

10. Nakintu and Bitanga-Isreal, “Diversity, Equity and Inclusion.”

11. Johnson and Svava, *Justice for All*.

12. Hur et al., “Managing Diversity.”

13. Tippett, “First Look at 2020 Census for North Carolina.”

14. Hur and Strickland, “Diversity Management Practices and Understanding Their Adoption”; Pitts et al., “What Drives the Implementation of Diversity Management Programs?”

15. Hur and Strickland, “Diversity Management Practices.”

16. Pitts et al., “What Drives the Implementation of Diversity Management Programs?”

Legal Compliance

The need to conform to various federal legal requirements and avoid costly discrimination lawsuits and settlements is also driving the adoption of DEI strategies by local governments.¹⁷ For example, Title VI of the Civil Rights Act of 1964 prohibits recipients of federal financial assistance, including local governments and their departments, from discriminating on the basis of race, color, or national origin in the provision of any program or activity. This applies to the basic delivery of services like subsidized housing and public transportation—two programs that disproportionately serve communities of color—as well as the process that allows residents to participate in such programs, for example, ensuring language access to persons with limited English proficiency.¹⁸ Additionally, laws like the Equal Pay Act of 1963, Title VII of the Civil Rights Act of 1964, the Age Discrimination in Employment Act of 1967, the Civil Service Reform Act of 1978, the Americans with Disabilities Act of 1990, and the Civil Rights Act of 1991 require equal opportunity in employment. For these reasons, local governments may take steps to diversify their workforces by actively recruiting, hiring, and retaining members of traditionally underrepresented groups. Public administrators may also prioritize improving data collection and analysis to refine programs and meet gaps in service delivery.

Organizational Effectiveness

Research shows that diverse and inclusive organizations are more effective in providing enhanced service delivery through better communication and understanding of the needs of a community.¹⁹ This aligns with the principle of *representative bureaucracy*, which proposes that organizations should reflect the demographic composition of the communities they serve if they want to be more responsive.²⁰ Research also shows that a more diverse and inclusive workforce fosters creativity and productivity, contributing to better problem-solving, decision-making capabilities, and employee job performance, because employees at all levels of the organization are exposed to alternative points of view.²¹

Actions to Advance DEI

Scholars, practitioners, and professional organizations have developed an array of strategies and frameworks to support local government leaders in addressing social inequities.²² Advancing DEI—particularly equity—requires organizational transformation, and many equity-focused frameworks, including those from ICMA and the National League of Cities, provide steps or a phased approach. Each phase contains distinct actions to advance DEI, yet it is important to remember that the phases are interconnected and not necessarily linear. As local governments engage in the different phases, they are driven forward through a process of organizational

17. Nishishiba, “Local Government Diversity Initiatives in Oregon.”

18. Ibid.

19. Ibid. See also Riccucci and Ryzin, “Representative Bureaucracy.”

20. Hur and Strickland, “Diversity Management Practices.”

21. Choi, “Diversity in the U.S. Federal Government”; Choi and Rainey, “Managing Diversity in U.S. Federal Agencies”; MissionSquare Research Institute, “Managing Workforce Diversity, Equity, and Inclusion in Local Government”; Findler et al., “The Challenge of Workforce Management in a Global Society.”

22. See Appendix 1 for DEI resources and trainings for local governments.

learning that involves continuous feedback and revision.²³ This learning process, like any organizational culture change, takes time.

We reviewed public administration literature and frameworks focused on advancing equity in local governments. From this review, four common phases of equity change for local governments were identified: (1) developing a shared commitment and vision, (2) assessing and building capacity, (3) establishing organizational infrastructure, and (4) creating and evaluating policies and practices.²⁴

Developing a Shared Commitment and Vision

One of the first steps for many local governments is developing a shared commitment to DEI. This stage often involves elected and appointed leaders “starting a conversation” about oppressive histories and how current practices are not working for everyone, particularly those who have been historically underserved.²⁵ Local government leaders, staff, and community members come together to discuss challenges and create a shared vision to prioritize and guide DEI efforts. As local governments engage in these conversations, it is important to clearly define diversity, equity, inclusion, and related concepts that are relevant to their unique contexts. In this phase, local governments may also issue public declarations or create mission and vision statements related to DEI. Ultimately, the work done at this point sets a foundation so that all staff and elected officials understand what key terms mean, why the organization is committed to DEI, and how their specific roles in the organization further that commitment. The following practices are associated with this phase:

- Adopting a formal resolution acknowledging a local history of racism.
- Releasing a formal statement in support of DEI efforts.
- Incorporating DEI principles into the organization’s strategic plan.
- Incorporating DEI principles into the organization’s mission/vision statement.
- Adding terminology around DEI principles to the organization’s website.

Assessing and Building Capacity

Sometimes implemented in tandem with the first phase, the second phase of organizational transformation involves assessing and building the capacity of staff and leadership in the local government. Assessing organizational capacity may include examining resources, existing DEI programs or initiatives, staff knowledge, skills, and comfort levels, internal human resources programs, and leadership’s commitment to DEI. Building capacity frequently occurs through DEI-related trainings and opportunities for meaningful dialogue. These trainings help staff and elected leaders understand the root causes of inequities and develop the necessary skills to work

23. Jacob, “Governing for Equity.”

24. The four phases were developed by analyzing and summarizing the approaches in the following sources: Jacob, “Governing for Equity”; Nelson et al., “Advancing Racial Equity and Transforming Government”; Annie E. Casey Foundation, “Race Equity and Inclusion Action Guide”; National League of Cities, “Municipal Action Guide”; Gill et al., “What Does It Take to Embed a Racial Equity and Inclusion Lens?”

25. National League of Cities, “Municipal Action Guide.”

toward eliminating them, including ensuring that mechanisms are in place to appropriately address incidents of discrimination. Actions in this phase may include:

- Instituting DEI-related training for governing-board members.
- Instituting DEI-related training for staff.
- Conducting DEI-related surveys of staff.
- Establishing formal mentorship opportunities for staff of color.
- Creating internship programs specifically targeting people of color.
- Establishing affirmative action plans for hiring staff of color.
- Establishing membership with the Government Alliance on Race and Equity (GARE) or another DEI-related professional organization.

Establishing Organizational Infrastructure

Related to building capacity, a third phase of organizational change focuses on developing an infrastructure that supports DEI implementation. This phase often involves hiring or designating people to lead DEI efforts, such as equity officers, DEI offices or departments, DEI teams (department level), DEI committees or task forces of internal and/or external stakeholders, internal DEI coaches or trainers, and partnerships with other institutions and communities. Additionally, building infrastructure involves assessing and designing data systems. Data is necessary to develop baselines, set goals, measure the success of specific programs and policies, and measure progress toward goals. Finally, establishing an infrastructure involves dedicating organizational resources, including financial resources, toward DEI. The following practices are connected to building infrastructure:

- Hiring a DEI-related officer to act as a dedicated staff person (e.g., Chief Diversity Officer).
- Assigning DEI-related responsibilities to an existing staff person.
- Establishing a DEI-related department (e.g., Office of Diversity and Inclusion).
- Establishing an internal DEI-related task force made up of staff.
- Establishing an external DEI-related advisory committee made up of residents.
- Establishing department-specific DEI initiatives.
- Setting aside a pool of budgetary resources targeted to DEI initiatives.

Creating and Evaluating Policies and Practices

The fourth phase of organizational change centers on creating and continually evaluating policies and practices. Here, local governments may apply an equity lens or tool to analyze new or existing decisions, such as policies, practices, programs, and budgets. Additionally, local governments frequently evaluate the impact of changes to policies and practices and make adjustments as needed. Sustaining DEI efforts means conducting periodic assessments of community and organizational needs. Actions aimed at creating and evaluating policies and practices may include:

- Evaluating human resources policies related to DEI.
- Reforming procurement and contracting policies to promote Minority and Women-Owned Business Enterprises (MWBE).

- Expanding data collection related to DEI performance measures.
- Implementing racial equity tools/toolkits (e.g., from GARE, ICMA) to evaluate policies, practices, and procedures.

Implementation Challenges

While there are a number of motivations for an organization to begin implementing DEI initiatives, there are also many challenges that public administrators might experience. The literature points to four common challenges, which include overcoming nervousness, gaining leadership support, assessing constituent demand, and determining financial constraints.

Nervousness

One of the key challenges confronting public managers is the resistance they may face from their staff and elected officials.²⁶ Susan Gooden suggests that such resistance stems from individual and organizational “nervousness” around social equity topics. Until this nervousness is effectively managed, efforts designed to reduce inequities cannot realize their full potential. An intentional change-management process can help reduce nervousness by normalizing conversations about DEI, developing a shared language, and assessing organizational readiness, while also recognizing that this type of culture change is a lengthy and iterative process.²⁷

Lack of Leadership Support

The lack of leadership support can also be a challenge to advancing DEI.²⁸ Just as staff must understand their institutional history with respect to social inequities, so must city and county elected officials. Without strong support and genuine commitment from people in leadership positions, it is more difficult to develop or implement DEI management approaches. In this sense, such efforts must be institutionalized throughout the organizational structure.

Constituent Demand

Like staff and elected leadership buy-in, constituent demand is an important factor to consider.²⁹ Some local officials and constituents may dismiss DEI efforts as “virtue signaling” to more liberal voting bases.³⁰ On the other hand, governments whose citizens are made up of more diverse populations may favor policies that reflect the principles of DEI but critique their implementation as placatory. Therefore, the diversity of a population and the homogeneity of a jurisdiction’s ideology are important factors to consider, particularly in a state like North Carolina, where local politics and diversity vary greatly by region. Balancing these competing pressures is a difficult task for public managers who wish to remain apolitical, as well as for elected officials who wish to remain in power.

26. Nishishiba, “Local Government Diversity Initiatives in Oregon.”

27. Gooden, *Race and Social Equity*.

28. Cooper and Gerlach, “Diversity Management in Action.”

29. *Ibid.*

30. Pitts et al., “What Drives the Implementation of Diversity Management Programs?”

Financial Constraints

Lastly, financial constraints are a challenge for any local government organization looking to fund new initiatives. The same goes for jurisdictions implementing DEI initiatives. The literature suggests that larger municipalities have the fiscal flexibility to hire consultants and technical experts to engage in DEI work, but smaller jurisdictions are more limited by financial constraints.³¹ While not all DEI initiatives require significant funding, a local government's budgetary allocations can impact the degree to which public managers and elected officials view DEI as a priority.

Methodology

To learn more about DEI efforts in North Carolina, we developed a survey and sent it to county and city managers (N=363) and administrators of mayor-council municipalities (N=180) in July and August 2021. Recipients were asked to indicate which of the twenty-three DEI-related actions listed were currently being implemented in their jurisdictions or were planned for the next fiscal year (2022–23). Additional questions focused on whether these actions were implemented government-wide or by department, where any DEI-related officers were located within the organizational structures, and if they received assistance in developing their DEI actions from outside entities. We also reviewed publicly available demographic information to better understand the populations the participating jurisdictions serve.

After analyzing the survey data, we conducted interviews with three of the jurisdictions that reported implementing at least half of the twenty-three DEI actions. The three jurisdictions were the City of Durham, the City of Gastonia, and the Town of Mooresville.³² The interviews were conducted in October and November 2022, and each one lasted approximately forty minutes and was audio-recorded. Representatives with knowledge of DEI work responded to our questions about the motivation for their jurisdiction's DEI work, what actions they had taken and were planning to take, the successes and challenges their jurisdiction had experienced, and the lessons they had learned. Our research team transcribed and thematically analyzed the interview data. To further validate the results, the interviewees were given the opportunity to check the accuracy of their statements and provide feedback on the team's findings.

Results

Survey Results

A total of forty-nine jurisdictions completed the survey in full for a 9 percent response rate. We received responses from managers/administrators in thirty-eight municipalities and eleven counties. Twenty-two of these municipalities and nine counties (63 percent of respondents) indicated they were currently taking DEI-related actions (see Appendix 2 for a complete list). Sixteen municipalities and two counties (37 percent of respondents) reported taking no actions at the time of the survey. Except for one county and one municipality, most jurisdictions

31. Ibid. See also Fernandez and Rainey, "Managing Successful Organizational Change in the Public Sector."

32. Durham County also indicated on the survey that they had implemented most of the DEI actions, but they were not available for an interview.

currently implementing DEI actions were planning to continue their work in the following fiscal year. Close to half of the municipalities that indicated they were not currently implementing DEI actions were planning to do so in the next fiscal year.

Most of the respondents who reported currently implementing DEI-related actions were implementing multiple actions. For example, the City of Durham reported implementing twenty-two of the twenty-three listed actions; the City of Gastonia reported fifteen; and the Town of Mooresville reported twelve. Durham County reported implementing half of the initiatives.

When asked whether they were implementing most of these DEI actions in particular departments or across their organizations, most of the respondents indicated that the implementation went across their organizations (nineteen or 86 percent of the municipalities and all nine or 100 percent of the counties). For those implementing DEI actions in individual departments, the most reported departments included human resources, police, fire, finance, and purchasing.

Demographic Analysis

Although more than half of the survey respondents were local governments with populations under 25,000 residents, less than half of these smaller jurisdictions (35 percent) were currently implementing DEI actions. However, the smaller jurisdictions were most likely to indicate that they planned to start implementing DEI initiatives in the next fiscal year. Most of the respondents that reported currently implementing DEI actions were from jurisdictions with populations over 50,000. In terms of geography, the survey respondents were from various areas of the state with the greatest representation from the Piedmont (eleven respondents), Triangle (eight respondents), and Charlotte-Mecklenburg (seven respondents) metropolitan regions. There was at least one municipality from each region of the state and at least one county from each region, except the Foothills and Sandhills areas. The majority of jurisdictions in each geographical area reported currently implementing DEI initiatives and planning to implement DEI initiatives in the next fiscal year. For more information about the respondent demographics, see Appendix 4.

Current Implementation Efforts

Several of the most implemented current DEI-related actions focused on designating people to lead DEI work, which is part of “Establishing Organizational Infrastructure,” the third phase of the equity-change framework. As indicated in Table 3, the most common initiatives for counties in this phase were establishing an internal DEI-related staff task force, hiring a dedicated DEI officer, and establishing a DEI-related department. Similarly, municipalities commonly reported establishing department-specific DEI actions, assigning DEI responsibility to an existing staff member, establishing an internal DEI staff task force, and hiring a dedicated DEI-related officer. Most of the jurisdictions that had a dedicated DEI officer indicated that the position reported to the manager’s office.

With respect to the other phases, the most frequently reported actions for counties and municipalities in phase one, “Developing a Shared Commitment and Vision,” was incorporating DEI principles into the county’s mission/vision statement or into the municipality’s strategic plan (see Table 1). For phase two, “Assessing and Building Capacity,” instituting DEI training for staff was the most implemented practice: more than half of the municipalities and counties that reported taking DEI-related actions had offered staff training. Some jurisdictions also reported offering training for their governing-board members (see Table 2). In terms of phase

Table 1. Number of Jurisdictions Implementing DEI Actions in Phase 1, Developing a Shared Commitment and Vision

Action/Initiative	Currently Implementing			Future Implementation		
	Municipality	County	Total	Municipality	County	Total
Adopting a formal resolution acknowledging a local history of racism	3	1	4	1	0	1
Releasing a formal statement in support of DEI efforts	5	1	6	4	0	4
Incorporating DEI principles into the organization's strategic plan	10	1	11	12	4	16
Incorporating DEI principles into the organization's mission/vision statement	6	5	11	6	0	6
Adding terminology around DEI principles to the organization's website	7	2	9	7	0	7

Table 2. Number of Jurisdictions Implementing DEI Actions in Phase 2, Assessing and Building Capacity

Action/Initiative	Currently Implementing			Future Implementation		
	Municipality	County	Total	Municipality	County	Total
Instituting DEI-related training for governing-board members	6	4	10	10	2	12
Instituting DEI-related training for staff	17	5	22	14	3	17
Conducting DEI-related surveys for staff	4	3	8	10	2	12
Establishing formal mentorship opportunities for staff of color	1	0	1	4	0	4
Creating internship programs specifically targeting people of color	5	0	5	7	0	7
Establishing affirmative action plans for hiring staff of color	2	1	3	4	0	4
Establishing membership with the Government Alliance on Race & Equity (GARE) or another DEI-related professional organization	6	1	7	9	2	11

four, “Creating and Evaluating Policies and Practices,” evaluating human resources policies related to DEI was the most implemented current action for counties and municipalities followed by reforming procurement and contracting policies to promote Minority and Women-Owned Business Enterprises (see Table 4). In terms of the least commonly implemented actions, none of the responding jurisdictions had established a commission on truth and reconciliation, and only one reported creating formal mentorship opportunities for staff of color.

Future Implementation Plans

Looking ahead, managers were asked which of the twenty-three initiatives, if any, they planned to undertake before the end of the 2022–23 fiscal year (see Tables 1–4). For both municipalities and counties, the most frequently planned action in phase one, “Developing a Shared Commitment and Vision,” was incorporating DEI principles into a jurisdiction’s strategic plan. With respect to “Assessing and Building Capacity,” training remained a commonly planned practice, with both county and municipal managers planning to institute DEI training for staff and governing-board members, along with plans to survey employees and become members of GARE or another DEI-related organization. In terms of phase three, “Establishing Organizational Infrastructure,” the most common planned action for municipalities and counties was establishing department-specific DEI initiatives, which was closely followed by setting aside targeted funds to support DEI initiatives and establishing an internal DEI-related staff task force. Lastly, the most common planned actions in phase four, “Creating and Evaluating Policies and Practices,” included using equity toolkits to evaluate policies, practices, and procedures; expanding data collection related to DEI performance measures; and evaluating human resources policies related to DEI. In terms of the least common planned actions, only one municipality intended to adopt a formal resolution acknowledging a history of racism or establish a commission on truth and reconciliation, while none of the counties planned to do either.

Table 3. Number of Jurisdictions Implementing DEI Actions in Phase 3, Establishing Organizational Infrastructure

Action/Initiative	Currently Implementing			Future Implementation		
	Municipality	County	Total	Municipality	County	Total
Hiring a DEI-related officer to act as a dedicated staff person (e.g., Chief Diversity Officer)	8	4	12	3	1	4
Assigning DEI-related responsibilities to an existing staff person	9	2	11	8	0	8
Establishing a DEI-related department (e.g., Office of Diversity & Inclusion)	5	4	9	3	1	4
Establishing an internal DEI-related task force made up of staff	8	5	13	7	3	10
Establishing an external DEI-related advisory committee made up of residents	5	3	8	5	0	5
Establishing a commission on truth and reconciliation	0	0	0	1	0	1
Establishing department-specific DEI initiatives	11	2	13	13	3	16
Setting aside a pool of budgetary resources targeted to DEI initiatives	7	1	8	9	2	11

Table 4. Number of Jurisdictions Implementing DEI Actions in Phase 4, Creating and Evaluating Policies and Practices

Action/Initiative	Currently Implementing			Future Implementation		
	Municipality	County	Total	Municipality	County	Total
Evaluating human resources policies related to DEI	12	6	18	12	2	14
Reforming procurement and contracting policies to promote MWBE	6	5	11	8	2	10
Expanding data collection related to DEI performance measures	5	2	7	12	2	14
Implementing racial equity tools/toolkits (e.g., from GARE, ICMA) to evaluate policies, practices, and procedures	4	2	6	14	3	17

Interview Results

The interviews affirmed the results of the survey and provided a more nuanced understanding of the steps each jurisdiction had taken. All three jurisdictions reported beginning their current DEI work within the last six years (Durham in 2017, Mooresville in 2017, and Gastonia around 2018 or 2019). However, with different organizational and community needs, they focused on different goals and actions and are now in different phases of their work. Nonetheless, there were similarities in their early steps, some of the key supports and challenges the jurisdictions had experienced, and their plans for the future.

Initial Motivations for DEI Work and Early Actions

In two of the jurisdictions, their recent DEI efforts were initiated by leadership. In the first jurisdiction, a manager attended a DEI workshop and then advocated for other leaders to also attend so they would all understand what “they were talking about.” In the second jurisdiction, the DEI work was similarly initiated by a key appointed leader who had attended DEI training and reinforced by a newly elected leader pushing DEI “to the forefront.” The third jurisdiction initiated DEI work to improve the organizational culture and to address employees’ “sense of not feeling included.” In terms of first steps, each jurisdiction hired or partnered with external DEI experts early in the process. These experts ranged from national organizations like GARE, which Durham joined as part of a yearlong North Carolina cohort, to local consultants that provided staff training and assistance in developing and implementing plans of action. While it took Gastonia a few years to decide on a desired approach, the other jurisdictions started taking action more quickly.

For each jurisdiction, many of their early actions focused on building internal capacity. For example, all three jurisdictions hired a DEI-related officer and established internal DEI committees or core teams. As the interviewee from Gastonia explained, “I was not confident that we [the existing staff] had the knowledge or education around DEI to successfully even start the program. So I think it is very important that we hire somebody with that knowledge, and that

is their sole job, to promote fairness and equity . . . internally and externally.” After Mooresville established a DEI committee, one of the committee’s first actions was to examine “our mission, vision and values, and how we can incorporate diversity, equity, and inclusion into all of them.” In addition to joining GARE and selecting a DEI manager, Durham’s early steps included creating a racial equity core team, which developed a vision and mission for racial equity work and later developed a racial equity plan. Given the city’s large number of residents of color, Durham’s DEI efforts intentionally center on race and focus on racial equity unlike many of its peer jurisdictions.

Additionally, each jurisdiction offered DEI training, including mandatory organization-wide training for all employees. Initially focused primarily on incorporating DEI internally, all three jurisdictions have since broadened their focus and are advancing DEI in their communities. In 2020, Mooresville created a community-relations committee; in 2021, Durham created a City–County Racial Equity Commission, which is responsible for implementing recommendations from the Durham Racial Equity Task Force; and Gastonia recently started offering community educational programs.

Current DEI Goals and Most-Successful Actions

All three jurisdictions built on their initial steps with further actions. Their current DEI goals at the time of the interviews either expanded on or aimed to evaluate their prior work. For example, Mooresville’s goals included developing a more advanced DEI training, evaluating the impact of organizational changes designed to increase a sense of belonging, and using surveys and focus groups to monitor changes in hiring and promotion practices. Similarly, some of Gastonia’s goals and actions included continuing to establish inclusive and equitable policies for hiring, purchasing, and construction projects and expanding recent efforts around community education and outreach. In Durham, the current goals and work included implementing the racial equity action plan so that equity is embedded in “the fabric of the organization’s policies, processes, procedures, and programs.”

In addition to their current goals and actions, the interviewees identified some of the most-successful or -impactful actions their jurisdictions had taken. Durham noted several successes related to increasing equity for its residents, including implementing a new language-access plan to better communicate with residents who have disabilities or who speak languages other than English, and launching participatory budgeting so that community members can weigh in on public budgets. The other two jurisdictions focused more on internal successes, such as an impactful “lunch and learn” series, DEI classes for current staff and new hires that “helped people to feel more comfortable talking around the subjects of diversity and inclusivity,” and “changes made around hiring and the education around hiring.”

Next Steps: Measuring Impact

All three jurisdictions had already collected or planned to soon collect data related to DEI efforts, and they were developing processes to measure the success or impact of this work. The interviewee from Durham explained, “We collect survey data, but we do not have impact analysis in place yet. That is something that we’re working on.” Similarly, the Gastonia interviewee said, “We can look at numbers, [and] we can see if our diversity increases or not. We know how many people have gone through any sort of training. We know where we’ve made changes related to policy. But in terms of measuring [success], it’s being developed as part of a strategic plan.” One

interviewee noted that measuring success can be “tough,” because their jurisdiction’s DEI work was still developing, and it will likely take several years of action to see and measure impacts.

Challenges and Supports

One common challenge to advancing DEI was pushback from stakeholders for various reasons. One interviewee described pushback on the topics of “gender and gender identity and sexual orientation” due to religious beliefs, while another observed staff pushback only when the conversation turned to race. Other sources of pushback and apathy were that “people don’t really understand what DEI means and what it doesn’t mean” or were “sick [of] talking about this.” While none of the interviewees reported pushback from elected officials or administrators, one interviewee noted that changes in senior leadership and elected leaders were challenging.

The interviewees also identified key supports for their DEI work and shared recommendations to overcome challenges. They all stressed the importance of leadership support. Two interviewees specifically mentioned the support of managers in initiating and continuing DEI work, while the other noted the “positive support” from the local council. Additionally, the interviewees described the key role of staff “champions” or “the folks on our committee that really see themselves as ambassadors to their department around DEI, which is really helpful.” In addition to suggesting training to help normalize conversations about DEI, interviewees offered other options to help address a lack of knowledge and/or disinterest in DEI. One interviewee found it useful to communicate DEI plans to employees and explain “why we were doing it” while another suggested “giving managers tools without labeling it DEI” and focusing on “what’s the goal” (e.g., making sure that people feel welcome here) while avoiding the “buzzwords that trigger people.” Interviewees also recommended “anticipating pushback” to DEI efforts and emphasized that patience and persistence were key to their progress. As one interviewee suggested, “It’s going to take a while . . . expect it, just like any other change in culture.”

Conclusion

This study brings awareness to the DEI work occurring in counties and municipalities across North Carolina. By understanding the current and future actions being implemented by different jurisdictions, we hope to highlight how local governments have started and developed their DEI efforts and the types of actions that could be taken. Returning to our research questions, we offer two conclusions about DEI efforts in our state.

1. Across North Carolina, local governments have implemented a range of DEI efforts. The specific approaches and sequences differ based on the local context.

Our study suggests that local governments have implemented various DEI-related actions, and the four phases of DEI efforts are not necessarily linear. Counties and municipalities were engaged in a range of actions to promote DEI that span the four phases with varied breadth and depth. Some local governments reported currently implementing one or two DEI-related actions, while others had implemented more than half of the actions on the survey. The jurisdictions also differed in terms of the goals and focus of their work (e.g., the extent of an internal versus external focus, and whether they had an explicit focus on racial equity as opposed to taking a broader approach to DEI). Moreover, although many jurisdictions have started focusing on DEI in the last few years, the most frequently reported actions on the survey (instituting DEI-related

training for staff, evaluating human resources policies related to DEI, establishing an internal DEI-related task force made up of staff, and establishing department-specific DEI initiatives) align with the later phases in the framework. This suggests that movement through the four phases is not linear but starts and progresses differently depending on the jurisdiction.

Our interviewees provided some insight into the sequence of their DEI efforts. For example, although offering DEI training is listed under phase two (Assessing and Building Capacity), the interviewees reported that having leadership support and increasing leaders' awareness through education were important factors in initiating DEI efforts. Thus, DEI education was a vital step in commencing DEI efforts and remained a key component in continuing to build skills and comfort along a jurisdiction's DEI journey. Moreover, even though establishing a DEI officer and DEI committee are part of phase three (Establishing Organizational Infrastructure), the jurisdictions we interviewed reported taking these steps early on so that people were in place and ready to lead the work.

2. Local governments plan to implement a variety of future DEI efforts, including an increased focus on data and evaluating policies, practices, and progress.

Much like their current actions, counties and municipalities were planning to implement a range of future actions that spanned the four phases. Some jurisdictions had not yet taken any action but were planning to soon, while others intended to continue building on their prior DEI work. The four most frequent actions planned for the future were incorporating DEI principles into the organization's strategic plan, instituting DEI-related training for staff, establishing department-specific DEI initiatives, and implementing racial equity tools/toolkits to evaluate policies, practices, and procedures. This range of actions suggests that jurisdictions are at different places on their DEI journeys and are implementing DEI efforts differently based on their goals and needs.

One shared need that emerged involves data and measurement. Both the survey results and interviews highlighted setting benchmarks, measuring progress, and evaluating impact as current goals, particularly for jurisdictions that have already taken some steps toward advancing DEI. It can take time to measure the impact of DEI efforts. As one interviewee explained, embedding DEI principles in an organization requires a multifaceted, multiyear approach: it is not "a check the box thing and you're done."

Limitations and Future Research

While this study provides valuable insights into DEI work in North Carolina, it has some limitations. First, the survey response rate of 9 percent was lower than we hoped. We believe that at least two factors contributed. First, the survey was distributed in July and August 2021, which was during the COVID-19 pandemic and just after the annual local government budget process had been completed. Many managers were focused on taking remedial actions to address the extraordinary effects of the pandemic on residents, staff, revenues, and services, as well as dealing with issues that had been put on hold while the budget process was underway. In that environment, replying to a survey was not a priority. Second, some jurisdictions, especially the smaller and more rural municipalities and counties, may not have initiated DEI-related work, and therefore they did not participate in the survey.

Additional limitations include the survey's focus on twenty-three actions. It is possible that local governments were taking or planning to implement actions that were not identified. Although we collected more detailed information in the interviews, the survey's space constraints precluded asking about additional actions and experiences, such as funding for DEI work, sources of stakeholder or community support or pushback, indicators of success, and evaluation plans.

This study was our first effort to collect information about localities' DEI work in North Carolina. Our goal was to understand what local governments are already doing or planning to do and not what should be done or how impactful those efforts have been. Future research should further explore local governments' experiences with starting, planning, implementing, and evaluating their DEI efforts. Some of the questions raised by our research that warrant further investigation include the authority and resources of DEI staff, changes in how local governments implement DEI over time, reactions from local elected officials, and impacts on the organizations and communities. It also would be interesting to explore why some local governments are not taking steps to advance DEI or planning to do so.

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Appendixes

Appendix 1. DEI Resources for Local Governments

- Government Alliance on Race and Equity (GARE)
 - › [Tools](#)
 - › [Trainings](#)
- International City/County Management Association (ICMA)
 - › [Equity and Inclusion Resources](#)
 - › [Tools and Research](#)
- Living Cities
 - › [Featured Resources—Racial Equity and Inclusion](#)
- National Academy of Public Administration
 - › [Social Equity in Governance](#)
- National League of Cities (NLC)
 - › [Report: Innovative, Inclusive and Equitable Cities](#)
- National Association of Counties (NACo)
 - › [Resources](#)
- North Carolina League of Municipalities (NCLM)
 - › [DIRECT—Racial Equity Programming](#)
 - › [Racial Equity and NCLM Task Force](#)

Appendix 2. List of Respondent Jurisdictions Implementing DEI Actions

*This list only includes local governments that responded to the survey.

- | | | |
|--------------------------|-------------------------|--------------------------|
| • Camden County | • City of Rhodhiss | • Town of Fuquay-Varina |
| • Caswell County | • City of Thomasville | • Town of Holly Springs |
| • City of Asheboro | • City of Wilmington | • Town of Indian Trail |
| • City of Bessemer City | • City of Winston-Salem | • Town of Mars Hill |
| • City of Burlington | • Durham County | • Town of Maxton |
| • City of Concord | • Edgecombe County | • Town of Mooresville |
| • City of Conover | • Gaston County | • Town of Rutherfordton |
| • City of Durham | • Guilford County | • Town of Sharpsburg |
| • City of Elizabeth City | • Madison County | • Town of Southern Pines |
| • City of Fayetteville | • New Hanover County | • Town of Tarboro |
| • City of Gastonia | • Town of Apex | • Wake County |
| • City of Hendersonville | • Town of Beaufort | |
| • City of Raleigh | • Town of Davidson | |

Appendix 3. DEI Actions by Phase in the Organizational-Change Framework

Developing a Shared Commitment and Vision

- Adopting a formal resolution acknowledging a local history of racism
- Releasing a formal statement in support of DEI efforts
- Incorporating DEI principles into the organization's strategic plan
- Incorporating DEI principles into the organization's mission/vision statement
- Adding terminology around DEI principles to the organization's website

Assessing and Building Capacity

- Instituting DEI-related training for governing-board members
- Instituting DEI-related training for staff
- Conducting DEI-related surveys for staff
- Establishing formal mentorship opportunities for staff of color
- Creating internship programs specifically targeting people of color
- Establishing affirmative action plans for hiring staff of color
- Establishing membership with the Government Alliance on Race & Equity (GARE) or another DEI-related professional organization

Establishing Organizational Infrastructure

- Hiring a DEI-related officer to act as a dedicated staff person (e.g., Chief Diversity Officer)
- Assigning DEI-related responsibilities to existing staff person
- Establishing a DEI-related department (e.g., Office of Diversity & Inclusion)
- Establishing an internal DEI-related task force made up of staff
- Establishing an external DEI-related advisory committee made up of residents
- Establishing a commission on truth and reconciliation
- Establishing department-specific DEI initiatives
- Setting aside a pool of budgetary resources targeted to DEI initiatives

Creating and Evaluating Policies and Practices

- Evaluating human resources policies related to DEI
- Reforming procurement and contracting policies to promote MWBE
- Expanding data collection related to DEI performance measures
- Implementing racial equity tools/toolkits (e.g., GARE, ICMA) to evaluate policies, practices, and procedures

Appendix 4. Survey Respondents by Population Size and Geographic Region

Population Size	Municipal					County				
	Currently Implementing?		Future Implementation?		Total	Currently Implementing?		Future Implementation?		Total
	Yes	No	Yes	No		Yes	No	Yes	No	
<i>Small (<25k)</i>	8	15	13	10	23	3	0	2	1	3
<i>Medium (25k<50k)</i>	5	1	6	0	6	0	0	0	0	0
<i>Large (>50k)</i>	9	0	9	0	9	6	2	6	2	8
Total	22	16	28	10	38	9	2	8	3	11

Geographic Region	Municipal					County				
	Currently Implementing?		Future Implementation?		Total	Currently Implementing?		Future Implementation?		Total
	Yes	No	Yes	No		Yes	No	Yes	No	
<i>Charlotte-Mecklenburg</i>	4	1	5	0	5	1	1	1	1	2
<i>Foothills</i>	1	4	4	1	5	0	0	0	0	0
<i>Northeast</i>	1	3	3	1	4	2	0	1	1	2
<i>Piedmont</i>	4	5	5	4	9	2	0	2	0	2
<i>Sandhills</i>	2	0	1	1	2	0	0	0	0	0
<i>Southeast</i>	3	2	3	2	5	1	0	1	0	1
<i>Triangle</i>	5	0	5	0	5	2	1	2	1	3
<i>Western</i>	2	1	2	1	3	1	0	1	0	1
Total	22	16	28	10	38	9	2	8	3	11