

# Applying the Equity Lens Without a Cultural Tax



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### **About the Institute for Policy Research and Engagement**

The Institute for Policy Research and Engagement (IPRE) is a research center affiliated with the School of Planning, Public Policy, and Management at the University of Oregon. It is an interdisciplinary organization that assists Oregon communities by providing planning and technical assistance to help solve local issues and improve the quality of life for Oregon residents. The role of IPRE is to link the skills, expertise, and innovation of higher education with the transportation, economic development, and environmental needs of communities and regions in the State of Oregon, thereby providing service to Oregon and learning opportunities to the students involved.

### **About the UO – Lane County Policy Lab**

The University of Oregon's School of Planning, Public Policy and Management and the government of Lane County started a partnership in 2018 to provide applied learning experiences for students, applied research settings for faculty and staff, and technical assistance to the Lane County government.

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# Introduction

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The United States is a multiethnic state composed of various people with different backgrounds and experiences. As a result of these various cultures, there is a great opportunity to create cultural exchanges and learn from people with different cultural backgrounds. However, in appreciating these various cultures, it is also important to address the histories of exploitation, racism, and discrimination that many systems within the United States are founded upon and carry out. The criminal justice, healthcare, and education systems are just a few examples of areas that have contributed to the objectification of black, indigenous, people of color (BIPOC) communities. Public managers and others who hold government roles have the opportunity and duty to uphold the dignity of these communities by operating from a place that enforces and encourages diversity, equity, and inclusion. This is imperative in the workplace as well as in the communities' public managers aim to serve.

In the summer of 2020, the United States saw an uproar in social justice initiatives and saw a call for more equitable practices across every system that negatively contributes to the ongoing racist actions and discriminatory practices of BIPOC groups. In recent efforts to address these issues, many cities have begun to establish or revise the ways in which equity is approached by developing equity lenses on both an internal and external level. The goal of an equity lens is to provide an organization or department a uniform approach in the ways members of these organizations or departments approach issues of diversity, equity, and inclusion (DEI).

This project will look at the equity lens in Lane County, Oregon and provide an analysis based on informational interviews with a variety of county officials in hopes of answering the following: how can an equity lens be applied without creating cultural taxes on BIPOC communities? For this project, cultural tax is defined as, “a burden placed on people of color to do the work of building diversity. A cultural tax places demands on BIPOC individuals to educate about racism, discriminatory practices, and white supremacy. It also asks BIPOC individuals repeatedly to be a representative or to take on roles in order to fulfill a requirement of inclusion of a marginalized community.” Through the discussions and interviews conducted in this research, some key findings or recommendations include: ongoing equity training for both managers and employees, equity implementation on a managerial level, collaboration between offices or departments with the Office of Equity and Access is highly encouraged, public managers should ensure that employees of color are not forced into tokenized positions where they are forced to speak on the behalf of an entire ethnic group, and plans should consistently be reviewed in order to establish best practices.

# Literature Review

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Government entities have a responsibility to encourage citizen participation in an equitable manner to carry out effective functions of the government, such as planning, implementing policies, and decision making. Oftentimes, the government fails to practice this ideal. The inability of many government entities to engage in citizen participation has impacted the social and health inequities of many different communities that represent a diverse group of people. The engagement of citizens is critical in government decision making because these policies and decisions disproportionately impact communities of color. When referring to citizen participation, it is important to emphasize the intersectionality of diverse groups of people representing BIPOC communities. As governments try to implement policies, the involvement of citizen participation can assist in formulating policies that might be credibly embedded in citizen preferences (Irvin, 2004). With the tough decisions that government administrators must make, the public may be more comfortable with government decisions knowing that their voices were being taken into account throughout the process. This could also lead to improved support from the public.

Other advantages of citizen participation are educational benefits, building trust and cooperation, improving social outcomes, social influence, and better decisions. When governments are open to the citizens' involvement, this allows for government decision-makers to receive education on specific community groups, understand their needs, and see community-wide solutions.

“An equitable, inclusive community engagement approach to public decisions ensures that the people most affected and most marginalized, especially those who have been historically left out of these conversations have a say in the decisions that affect their lives. Inclusive civic engagement results in government processes, practices, and decisions that are more responsive to community priorities, avoid many unforeseen consequences, and create relationships that hold local governments accountable” (ChangeLab Solutions, 2018).

The most effective solutions when implementing equitable and efficient policies will always come from those from that community and living that shared experience.

Padilla (1994) explores the setting of higher education to consider cultural taxation. Minorities here are faculty of color (FOC.) The term cultural taxation is coined by Padilla in this article. According to the author, the forms of cultural taxations are,

“being called on to be an expert on diversity issues within the organization even though FOC may not be knowledgeable on the issues or comfortable in the role. Being called on to educate a group of non BIPOC people about diversity even

though this is not in FOC's job description. Serving committees and task forces even though FOC do not have an influence on decision making. Serving as the liaison between the organization and the ethnic community even though FOC may not agree with the policy their organization proposes. Taking away from own work to serve as a problem solver for issues that arise because of socio-cultural differences among the administration and staff, or community within the organization" (Padilla, 1994, p. 26).

According to Padilla, FOC feels a sense of belonging within the institution and therefore are inclined to act as positive citizens in the institution, thus, they are representatives of their ethnic communities. Moreover, FOC do not get paid for their role in cultivating equitable and diverse environments outside of their academic work. The work brings burdens to FOC, and they are emotionally drained (p. 26). Padilla does not provide specific recommendations for preventing cultural taxation; however, he suggests mentoring FOC and providing professional development support to them.

Hafer & Ran (2016) attempt to elaborate on citizens' perspectives in participation where generally public administrators' voices are the ones amplified. The citizens' perspectives highlighted through citizen participation is needed and appreciated more because social problems have increasingly become complicated and will require intimate understandings of community needs. The authors determined that the identities of citizens are constructed through public participation, adopting a social identity approach. The term 'social identity approach' refers to research and theory pertaining to social identity theory; social groups individuals belong to such as race/ethnicity, gender, (dis) ability, religions, and sexual orientation and self-categorization theory; individual's unique characteristics (Wikipedia.) Thus, the authors suggest that the relationship between the social identity approach and public participation develops recognition of citizen's perspectives and furthermore, it fosters collaboration between citizens and public administrators. "Participation" in this instance can be interpreted as the equity lens strategic plan implementation and "citizens" are BIPOC community members. This article is important as it relates to the discussion of cultural tax because citizens' (BIPOC community's) perspectives should be taken into consideration and inclusive in the plan.

Shavers, Butler, & Moore (2015) discuss the role of African-Americans in predominantly white institutions. African-Americans are asked to perform "hidden service agendas," where individuals are asked to fill roles representing entire communities in addition to the regular work for which they are hired. This paper focuses on higher education as it relates to people of color in general as they are used as employees to signal diversity but are expected to take on the service work of representation, even while the time spent doing so may be seen as lacking value as part of career advancement. People of color may be expected to perform service of representation while not receiving value for this work, leading to professional pressure and stress. Many African-Americans find racial service rewarding and even want to take this work on. There are times when valued work overlaps with service, and this may afford the most opportune time for service

within a professional situation. This paper suggests strategies for dealing with the cultural tax. Black people should be able to say “no” to offers of work or to set boundaries like taking time to fully consider any offer of service, because of the cultural tax. Saying no may be difficult if individuals want to serve and give back. Managers should coordinate with Black employees and people of color; if people of color are being pressured to serve on committees, managers should help regulate these requests.

## Description of Work

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To compile data regarding equity lenses, numerous interviews were conducted with state employees to get a better understanding of approaches toward equity work and how Lane County specifically established the equity lens. Interview coordination took place via email and was conducted over zoom. Those of the group that were able to attend interviews did and took in-depth notes to share with the rest of the group at the next check-in, which occurred weekly. The following list details the interviewees and the roles each interviewee held at the point of the interview.

- José Melendez, assistant professor (UO)
- Mo Young, equity and access coordinator (Lane County)
- Ben Duncan, chief diversity and equity officer (Multnomah County)
- Sequoia Hill, Chair of Equity Advisory Board (Lane County)
- Markisha Smith, Director of the Office of Equity and Human Rights (City of Portland)

The team reviewed a handful of literature sources that discussed topics such as tokenism, equity work, and representation. Of the articles read, multiple literature reviews were incorporated into the project to establish a better foundation for equity lens work and the findings of the overall project.



# Findings of Project

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The scope of this project is to consider the Lane County equity lens and how to avoid creating a cultural tax. The equity lens is focused on considering the impact of decision making and plan development particularly with regard to racism. For public managers the cultural tax may become an issue as departments of the county implement the lens, departments may be tempted to turn to BIPOC individuals to serve in tokenizing roles to achieve a sense of diversity for an institution. While it is important to have governments and organizations be representative of the communities they serve, it is important to achieve representation through a process of mutual benefit and not based on exploiting a cultural service.

The cultural tax may occur within an organization by calling on staff, or outside the organization by calling on individuals from the community, to serve as representatives where ethnicity is the primary reason for their involvement. Asking individuals without a clear decision-making power in the process to serve as advisors, or to perform cultural services of mentoring or educating other staff, where this is not a clear part of their job duties, puts individuals in the position of service without being empowered. In the interviews there were repeated concerns about how to implement and hold departments accountable for implementing the equity lens. A partial concern is that this work would be laid on the shoulders of the tokenized employees, or that the office of equity and access would be brought in at the last minute, essentially tokenizing the equity lens itself. Successful implementation of equity work at other institutions involved a mechanism of control or lever of power to create accountability. Having a tool of compliance gives the work of carrying out the equity lens a process with teeth. In multiple interviews a manager-level position, while sitting on a board, was able to ask other departments how they had implemented their equity plans. One local government used a finance board - to which all departments need to submit their annual budgets, as a forum to ask the departments to produce an equity plan, thereby ensuring compliance. Another government body used a management meeting where all department heads held regular check-ins as a mechanism of accountability, where any new project shared with department heads could be scrutinized as to how the equity lens was applied. It is crucial for departments to feel the need to use the equity lens and for there to be an evaluation and reassessment process.

Another critical success was using training, resources, and universal messaging. One local government uses equity 101 training as part of the onboarding of new employees. Other tools included using training of managers so that frontline employees were not responsible for implementation. Broad training and accountability encourage widespread participation. Universal messaging allows for equity to be applied in ways that reach everyone. If the goals of the lens are universal, then resources can be allocated to ensure outcomes are

universal. An example of this would be universal education, if a goal is for everyone to graduate high school, extra resources may be needed to achieve this, but all parties should support reaching the universal goal. Organizations and individuals should be recruited as partners with decision-making input, and not for tokenism.

## Conclusion

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Based on the findings of this research, implementing the equity lens and avoiding a cultural tax, these are the key ways to be successful and avoid administrative pitfalls. Successful implementation of an equity plan will require training and resources, especially for managers. This training should feature practical examples of considerations a department should include when using the lens for their office. Managers must be able to help directly use the equity lens at the point of frontline work so that frontline workers are not in a position to advocate for the implementation of the equity lens.

Departments should begin by considering how to incorporate the equity lens and then bring a plan to the Office of Equity and Access. Reaching out early, with time for alterations and further considerations, is critical to successful implementation. Avoid bringing a proposal at the last minute. Departments should seek diversity in advisory commissions and representation through partnerships and stakeholders while taking steps to avoid seeking representation from individuals simply because of their ethnicity or if an individual identity is needed for representation, it is better to find collaborative stakeholders.

Accountability is key in building out and maintaining effective use of the equity lens. A member of the Office of Equity and Access should be part of a mandatory participation process. Through a senior administrators meeting or at a finance committee, where all departments must present, there must be a space where departments show their work on a developed equity lens. This space is crucial to ensure compliance and motivate departments to continue developing plans. Participation in a central meeting is also helpful for the Office of Equity and Access to learning about newly developing projects so that the Office can follow up with each department to assist with implementing the equity plan with new projects. A rubric for considerations of new projects should be incorporated with the training for managers and employees. A final component of accountability is a regular review of equity lens implementation. An equity lens should be a living document which can be updated to reflect changes in cultural needs and understandings. Periodic review is helpful for all departments to evaluate ongoing work and is especially useful for new initiatives, which may want to check in as the new program develops. New programs may need to develop as they are implemented. Supporting equity as a foundation of the work will mean checking back to see how the lens is working and if additional changes are needed to achieve desired program outcomes.

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