

Social Equity Planning and Assessment Tool

Preliminary Discussion Draft for New Design and Construction

The *Social Equity Planning and Assessment Tool* is part of USGBC's Equity Action Plan. It is intended to encourage and help project teams plan, assess and be recognized for the actions they take to advance equity. This preliminary draft presents ideas and a structure to encourage discussion, revision, and improvement. A version for existing buildings will follow.

The Equity Action Plan includes:

- a *Planning Tool* that is designed to be used in early stages of a project, to encourage project teams to think about how equity could be incorporated into a project
- an *Assessment Tool* that suggests potential strategies for addressing the planning questions and could be used to recognize a project's accomplishments. The assessment tool includes LEED credits, LEED Pilot Credits, credits from other certification systems, and proposals for new Pilot Credits or equity-specific revisions to existing credits; existing credits can be viewed through hyperlinks. **TBD** indicates new Pilot Credits to be developed.
- Resources, specific tools, case studies, and stories will be added to help project teams succeed. Resources are not included in this preliminary draft.

We want to hear from you!

- What are your overall reactions?
- What's missing and what should be added?
- What should be deleted or revised?
- How can we make these documents more meaningful?
- What good resources have you seen – tools, case studies, stories, organizations that might want to be involved?
- What would make you more likely to use the tool?

Please submit your ideas and feedback @ usgbc.com/all-in.

Social Equity Planning and Assessment Tool:

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Planning	Y/N	Assessment	Pts	✓
I. EQUITABLE PROJECT TEAMS				
IA. Equity in the Development Team (owner, planners, architects/designers, engineers, developers, financial firms, construction management companies)				
<p>Good governance and reporting.</p> <ul style="list-style-type: none"> Are you and the majority of member firms of your project team looking at governance issues by being B Corp or JUST companies or regularly reporting on ESG (Environmental, Social, Governance) issues through third-party frameworks such as GRI, GRESB, DJSI? 		Social Equity within the Project Team (to be revised, expanded)		
<p>Diversity, inclusion.</p> <ul style="list-style-type: none"> Are you intentionally adding diversity in your firms' staffs and equal opportunities within your project team, including race/ ethnicity, gender, religion, differing abilities, and other factors? Are you examining company policies for hiring, promotion, pay and other elements to ensure equity? Are you identifying areas where past inequities require action to remediate those inequities? Are you mentoring for more diverse future generations? 		TBD: Project Team Diversity and Inclusion		
		TBD: Mentoring and Outreach to Expand Diversity and Opportunity		
<p>Social equity expertise/knowledge.</p> <ul style="list-style-type: none"> Does the project team have knowledge and experience in issues of social equity? Can you build expertise within your core team? How will you bring in additional experts to supplement the team? 		TBD: Social Equity Expertise and Experience		
<p>Hiring local firms and companies.</p> <ul style="list-style-type: none"> Have you committed to hiring/training local firms and local companies? 		TBD: Local firms and companies		
<p>Direct community service.</p>		TBD: Community Service		

<ul style="list-style-type: none"> Do your firms provide direct support to the community or community groups through pro bono work, contributions, other activities? 				
<p>Innovation.</p> <ul style="list-style-type: none"> Submit your own idea – question/ strategy 				
<p>IB. Equity for Construction Workers</p>				
<p>Diversity in construction firms and workers.</p> <ul style="list-style-type: none"> Do you have a policy to identify and hire more diverse construction firms, including women-owned, minority-owned, veteran-owned firms? Can you encourage firms to hire women, minorities, and veterans? 		<p>TBD: Diversity for firm ownership, staff, subs</p>		
<p>Hiring local workers.</p> <ul style="list-style-type: none"> Do you ensure that contractors and subcontracts hire, and train as necessary, local workers? Do you encourage training and promotion of these workers? 		<p>TBD: Local hiring for construction workers</p>		
<p>Education and Training for construction workers.</p> <ul style="list-style-type: none"> Do you provide equity training and diversity training for the construction team? Skills training for workers? Other training and education opportunities for workers, such as English as a Second Language, financial skills, literacy, etc.? 		<p>TBD: Training and Education for Construction Workers</p>		
		<p>Green Training for Contractors, Trades, Operators, and Workers</p>		
<p>Health, safety and labor rights for construction workers.</p> <ul style="list-style-type: none"> Have you discussed ways to improve health and safety conditions for workers involved in the project during construction and operations? Is safety training provided during work hours and is personal safety equipment provided without cost to all workers? Is your firm and those of the organizations involved with the project providing equitable, non-discriminating treatment, fair working conditions and living wages? If housing is provided, do conditions meet at least minimum requirements for space, sanitation, privacy, and health? Have you designed the project to reduce potential hazards for construction workers as well as maintenance workers during operations? 		<p>TBD: Equity for Construction Workers</p>		
		<p>Prevention through Design (PtD)</p>		
		<p>TBD: Worker Safety and Health</p>		
<p>Innovation.</p> <ul style="list-style-type: none"> Submit your own idea – question/strategy. 				

II. EQUITABLE PROCESS

IIA. Initial Project Planning, Data Collection and Analysis			
<p>Planning Checklist.</p> <ul style="list-style-type: none"> Are you using the Social Equity Checklist as part of your early planning? 		Social Values Checklist in Integrative Process credit – required?	
<p>Community needs assessment.</p> <ul style="list-style-type: none"> Have you analyzed the makeup of the users and surrounding community to be able to meet their needs, particularly more vulnerable/under-served populations? Have you studied the history of the surrounding community and know how it impacts the present strengths and needs of the community? Can you identify the most pressing public health, equity, social, and economic issues of the surrounding community in which the project is located? What are the top 3? Can your project help the community address any of these issues? 		TBD Site Assessment (new Pilot Credit)	
		TBD: EJ Assessment	
		TBD: Demographic Analysis	
		TBD: Perform an Equity Impact Review	
		Integrative Process for Health Promotion	
		Assessment and Planning for Resilience	
		RELi PA, Credit 1.0, Business + Community Case Analysis, Post-Development Evaluation + Reporting	
		RELi CV Req 1.0 Improve Common Quality of Life OR ENVISION V2 QL1.1 Improve Community Quality of Life (Option 1)	
<p>Innovation.</p> <ul style="list-style-type: none"> Submit your own idea – question/strategy. 			

IIB. Community Engagement				
<p>Affected community.</p> <ul style="list-style-type: none"> Have you identified the project’s stakeholders, including neighbors, existing organizations and institutions, and representatives of the surrounding community? 		Social Equity within the Community		
<p>Listening and collaboration.</p> <ul style="list-style-type: none"> Are you employing staff experienced in facilitating fair, effective community engagement? Have you collaborated with the people of the community, and learned their needs, goals, and visions before refining/finishing development of project goals/scope and intended outcomes? Have you considered setting up a paid advisory board to help ensure the community’s goals are understood and considered over time? 		Social Equity within the Community		
		Community Outreach and Involvement		
<p>Communications and Visual Representation.</p> <ul style="list-style-type: none"> Have you considered all of your communication strategies in relation to the surrounding community, including social media, timing/staging of meetings or methods of attaining public input, site signage, manuals, etc.? Incorporating a place for stories/ photos/ history/ feedback? Are your renderings ethnically and culturally inclusive and reflective of the project’s surrounding community? 		Social Equity within the Community		
		Community Outreach and Involvement		
<p>Feedback loop for meaningful engagement.</p> <ul style="list-style-type: none"> Do you have a mechanism for continuing to listen to, and engage with/respond to, the community throughout the project’s design, construction and/or the life of the project? Do you have metrics for measuring success towards the goals set for the project? Is the process and building data accessible to the public? 		Social Equity within the Community		
		Community Outreach and Involvement		
<p>Innovation.</p> <ul style="list-style-type: none"> Submit your own idea – question/strategy. 				
III. EQUITABLE DESIGN				
IIIA. Equitable Design for Project Occupants and Visitors				
<p>Inclusion and Accessibility.</p> <ul style="list-style-type: none"> Can you make your project welcoming, inclusive, and accessible for all who will live, work, learn, or play in the buildings or on the grounds? Are there any specific needs of occupants and visitors that should be considered? 		Inclusive Design OR Residential Inclusive Design		
		<p>TBD: Culturally Inclusive Design</p>		
<p>Equitable Transportation.</p>		Access to Quality Transit OR		

<ul style="list-style-type: none"> Will your project be accessible by quality transit for all who live, work, learn, or play in your project? Will transit be available at the times needed by all, including those who work swing shifts and overnight? Will “mini transit” be available for off-peak hours if needed? Are alternatives such as bike paths and pedestrian paths connected to networks that serve all or only a subset of those who will live, work, learn, or play in the project? 		RELi CV Credit 2.0 Community Connectivity Walkability, Public Transit, Nonmotorized Transit		
<p>Health and safety.</p> <ul style="list-style-type: none"> How can you ensure health and safety for all who use the project? What is needed in the project design to protect health and safety of those who might be more vulnerable or at risk, such as young children, the elderly, and others? Do you have health objectives for the project in terms of air, water, light, comfort, materials, community, etc.? 		Lead Risk Reduction (new Pilot Credit) PBT Source Reduction (new Pilot Credit) TBD: Potable Water (Water Quality) Passive Survivability and Backup Power During Disruptions OR RELi PA Req 1.0, Study: Short-Term Hazard Preparedness + Mitigation Green cleaning/ O&M Starter Kit		
<p>Equitable Space Planning and Amenities.</p> <ul style="list-style-type: none"> Can you allocate space and design work areas to increase collaboration and reduce hierarchies? Can you allocate space for personal needs of occupants and visitors? Can you enhance spaces for occupants at all levels of abilities? Can you increase comfort, connection to nature, and other factors that enhance well-being for all occupants and visitors regardless of rank or position? 		New ideas needed (Lactation rooms, meditation rooms, collaboration space, access to amenities, other? Open to all) TBD Biophilia?		
<p>Innovation.</p> <ul style="list-style-type: none"> Submit your own idea – question/strategy. 				
<p>IIIB. Equitable Design for the Surrounding Community</p>				
<p>Displacement/ other impacts on current community.</p> <ul style="list-style-type: none"> Can you take steps to prevent your project from causing displacement or alienation of existing residents, local small businesses, and institutions, such as encouraging home/retail ownership /new tax policies for people and shops and services already in the neighborhood, in order to stabilize what is already successful? Can you ensure your project does not create barriers to current patterns of community? 		High Priority Site and Equitable Development (Option 2, Path 1) TBD Maintaining/ Supporting Community Connectivity and Patterns Housing and Jobs Proximity		
<p>Community access to space/services.</p>		Local Food Production		

<ul style="list-style-type: none"> Can your project provide access/programming that address an existing gap or meet a current need within the building or beyond for use by the surrounding community? 		Joint Use of Facilities		
<p>Accessibility.</p> <ul style="list-style-type: none"> Can your project go beyond ADA in being accessible to all? 		RELI CV Credit 3.0 Community Connectivity: Mixed Use Commercial, Housing, + Public Community Space		
<p>Resilience.</p> <ul style="list-style-type: none"> Are you familiar with the major physical, social or economic impacts from climate change, social upheaval, cyberattacks, etc. that can affect the surrounding community? Does your project help the community to build resiliency and social infrastructure and mitigate or adapt to negative impacts? 		Walkable Project Site		
		TBD: Visibility and Safety		
		TBD: Accessibility		
		Assessment and Planning for Resilience		
		Design for Enhanced Resilience		
		RELI CV – Community Cohesion, Social and Economic Vitality		
		RELI PH – Productivity, Health and Diversity		
		RELI PH 3.0 Human HDP: Provide for Social Equity + Interdisciplinary Intercultural Opportunities		
		Renewable Energy (new Pilot Credit)		
<p>Infrastructure impacts.</p> <ul style="list-style-type: none"> Have you considered and incorporated new or upgraded infrastructure (water, power, access, transit, resiliency, emergency responders, etc.) to respond to needs created by the project and its inhabitants? 		Comprehensive Composting		
		TBD – Transit accessibility, flexibility, access		
		TBD - Water		
		TBD Streetscapes, Open Space		

<p>Celebration of “Place”.</p> <ul style="list-style-type: none"> Are there ways your project can acknowledge and celebrate the place, culture and history of the surrounding community and make it a meaningful and inspiring part of the project? 		<p>TBD: Equitable Placemaking + Historic Acknowledgment</p>		
<p>Local hiring/ economic benefit.</p> <ul style="list-style-type: none"> Can your project support local hiring and training and/or use of local businesses and products beyond the construction phase, especially to support disadvantaged populations? 		<p>TBD: Local Skills Building and Employment OR RELi CV Credit 1.0 Incorporate Important Community Views + Aspects of Local Landscape</p>		
<p>Good neighbor.</p> <ul style="list-style-type: none"> Can your project be a good neighbor during demolition, construction and operations in terms of noise, air/water pollution, waste, access, information, etc.? 		<p>TBD: Local Art – Innovative Performance</p>		
<p>Health and well being</p> <ul style="list-style-type: none"> Can the building address identified public health issues in the community surrounding the project? 		<p>TBD: Local Skills Building and Employment OR RELi CV Credit 6.0 Develop or Expand Local Skills, Capabilities + Long-Term Employment + Mix</p>		
<p>Innovation</p> <ul style="list-style-type: none"> Submit your own idea – question/strategy. 		<p>RELi CV Credit 6.0 Develop or Expand Local Skills, Capabilities + Long-Term Employment + Mix</p>		
		<p>TBD: Community Cooperative Ownership</p>		
		<p>Construction Activity Pollution Prevention (prerequisite)</p> <p>Enhanced Acoustical Performance – exterior noise control</p> <p>Community Contaminant Releases – airborne releases</p> <p>Clean Construction</p>		
		<p>Heat Island Reduction (new Pilot Credit)</p> <p>RELi CV1.0 Improve Common Quality of Life (Options 1 and 2) OR Envision V2 QL 111 Improve Community Quality of Life</p> <p>TBD (need health-related credit)</p> <p>Look at LEED for Cities for other credits</p> <p>TBD: Re-entry programs for people released from prison</p> <p>TBD: Family planning education and resources</p>		

IV. EQUITABLE SUPPLY CHAIN

IVA. Equity for Supply Chain Communities				
<p>Health and safety for fenceline and other impacted communities.</p> <ul style="list-style-type: none"> Are you considering the impacts of product life cycles in terms of extraction and material processing/manufacturing on nearby fenceline communities? Are you considering the impacts of transporting materials through communities? 		TBD: Equity for Communities in the Supply Chain		
		TBD: Identification of Supply Chain Hotspots		
<p>Innovation</p> <ul style="list-style-type: none"> Submit your own idea – question/strategy. 				
IVB. Equity for Workers in the Supply Chain				
<p>Human rights for workers in the supply chain.</p> <ul style="list-style-type: none"> Are you increasing your awareness and avoidance of potential human rights abuses along the project’s supply chain by having a responsible sourcing policy for selecting materials and products? Have you identified potential “hot spots” for abuses in those supply chains? Have you communicated to manufacturers that this is a priority? 		Social Equity within the Supply Chain		
		TBD Identification of Supply Chain Hotspots		
<p>Innovation</p> <ul style="list-style-type: none"> Submit your own idea – question/strategy. 				