



Centering Equity in Human Resources Policies & Practice



About Learning for Action (LFA)

LFA's mission is to partner with social sector organizations to strengthen their learning culture and practice, in service of equity and justice. We do this through **strategic reflection and learning/evaluation, organizational development, and capacity building.**

We support our clients to tackle complex problems, push for structural and systemic change, and address the root causes of inequities. We hold diverse content area expertise, including **healthcare, education, economic mobility, immigration, advocacy, leadership development, arts/cultural programs, and building the capacities and power of communities.**

Our work is **person-centered, grounded in equity, and data driven.** We engage deeply with our clients, collaborating on and facilitating processes that draw on all partners' strengths, while also providing guidance and recommendations based on our extensive experience. We use inclusive and participatory processes that amplify and center the voices, perspectives, and stories of those closest to the work

Over the course of our 24-year tenure, we have conducted more than **900 evaluation, capacity building, and consulting projects for organizations, foundations, and government and county agencies** across the social sector. We have staff in all regions of the United States and experience with organizations doing work everywhere from their own neighborhoods to internationally.


About PEG

Public Equity Group (PEG) is a diverse practice of strategy and management consultants mobilized to help visionary leaders and organizations achieve impact. PEG works with partners poised to make a demonstrable difference on the "big issues of the day" — in service of equity. In particular, we look for clients with the following qualities:

- Deep equity/justice commitment and compatible organization values
- High potential for national or global impact, scale, and/or replication
- Strong leadership (strategic thinking, management, implementation)
- High organization capacity to implement (staff and board quality; planning, monitoring, operations, and systems quality)

About Funder

RWJF is a leading national philanthropy dedicated to taking bold leaps to transform health in our lifetime. To get there, we must work to dismantle structural racism and other barriers to health. Through funding, convening, advocacy, and evidence-building, we work side-by-side with communities, practitioners, and institutions to achieve health equity faster and pave the way, together, to a future where health is no longer a privilege, but a right.



For many people, HR policies and practices have been the source of workplace trauma. Yet from my own experience, too few organizations call out HR policies and practices as areas to improve.

– **Shonta Chambers**

Executive Vice President
Health Equity Initiatives & Community Engagement

Introduction

For many employees in the United States, human resources (HR) practices and policies at their respective organizations are often not well understood, and their tone and content can leave employees feeling alienated or at risk of punishment. Many perceive HR's relevance to organizational equity work as limited to ensuring diversity in recruitment, hiring, and retention. Leaders frequently overlook HR's potential to influence organizational functions, norms, and practices, including living up to its stated mission and values and building an inclusive culture for all employees.


In early 2021, nearly 40 organizations funded by the Robert Wood Johnson Foundation (RWJF) embarked on a collective effort to build their organizational capacity around advancing racial+ equity¹. This project, called the Equity Learning Lab (ELL), involved organizations that were already working on some dimension of health equity in their work. For these organizations, the ELL presented an opportunity to better center racial+ equity in their program strategies, learning, evaluation, and organizational development within a cohort of other organizations. The project provided organizations with robust support — multiple types of coaching and consulting services, a curated and extensive curriculum of resources and tools, and a project structure that encouraged peer learning across multiple organizations of varying sizes and types — all of which focused on some aspect of improving health care and health care systems.

The ELL was designed to be customizable to each organization's equity work and journey. To facilitate customization, and to provide organizations with multiple entry points, ELL leaders provided a resource called the Organizational Equity Reflection Tool (OERT). The OERT provides a framework for assessing what an organization might want to focus on and prioritize at different stages, and what resources it will need to engage in this work. Overall, the ELL was designed to convey that equity-focused work is an ongoing journey without an endpoint. For example, the OERT outlined [nine dimensions of organizational equity work](#), including “Mission & Values,” “Strategy,” and “Communications and Messaging.” Of these nine dimensions, “Organization - HR” is one, delineated separately from other dimensions related to finance and operations.

One participating organization, Patient Advocate Foundation (PAF), chose to focus part of its work on the HR dimension. PAF is a 200+ person organization that provides patients with case management services and/or financial aid, helping them access care and overcome financial hurdles during the most vulnerable times of illness.

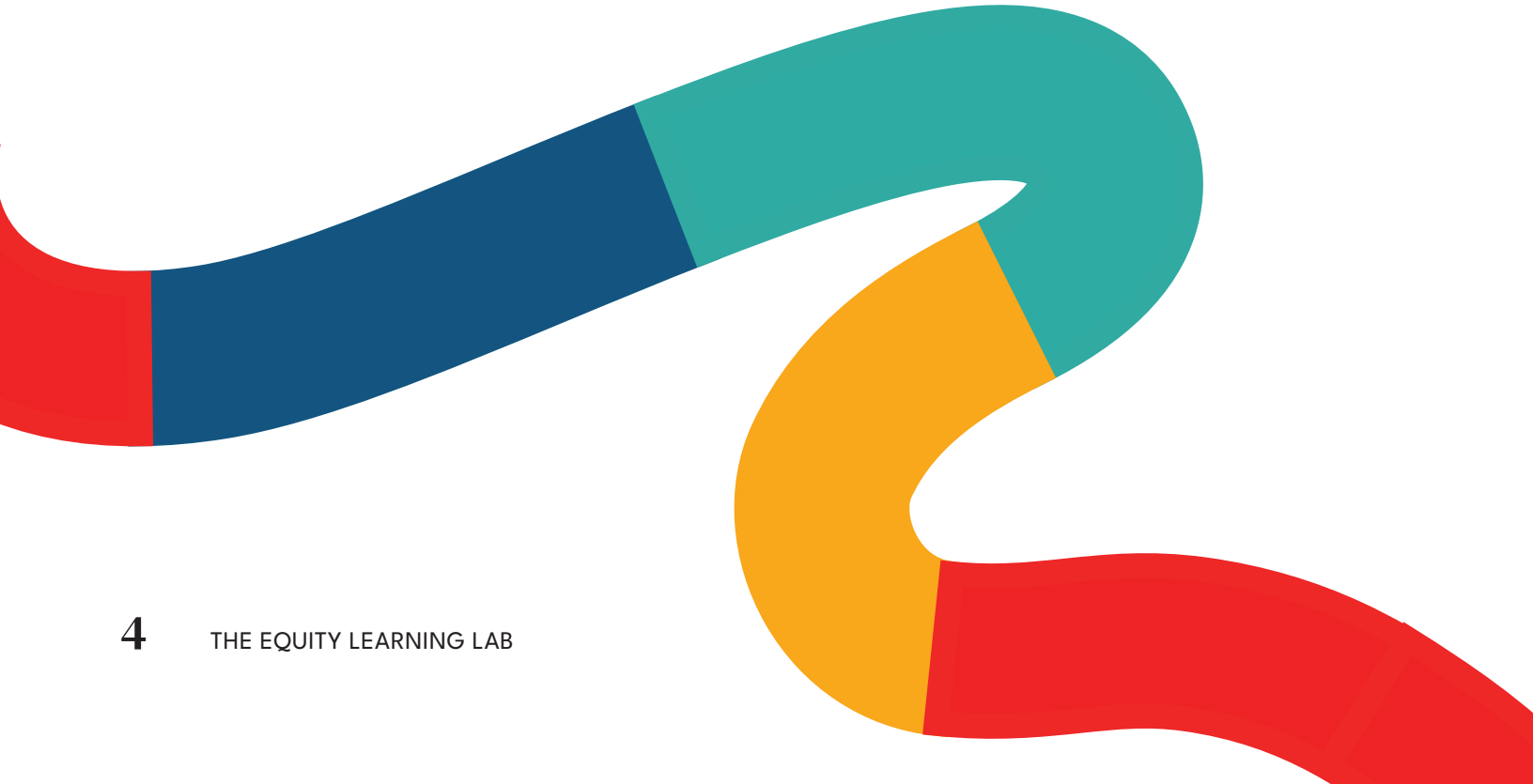
¹ The term “racial+ equity” refers to the fact that while racial equity was the primary focus of this project, organizations also had latitude to address other dimensions of equity.

PAF leaders chose to structure the organization’s participation in the ELL through a staff affinity group made up of employees representing diverse roles and functions. This affinity group engaged with the OERT and ultimately chose three non-HR dimensions to focus on:

-  **Culture & Values**
-  **Communications & Messaging**
-  **Evaluation & Learning**

However, two executive-level leaders at PAF — Shonta Chambers, Executive Vice President of Health Equity Initiatives and Community Engagement, and Angela Walker, Chief of Talent Management — decided to undertake a fourth dimension: HR policies and practices. The centerpiece of this work was a complete overhaul of the employee handbook, sometimes known as an employee “manual.” These resources, which vary widely from organization to organization, usually contain the sum total of an organization’s HR policies and practices, such as employee codes of conduct, travel and expense allowances and restrictions, and policies pertaining to family leave or bereavement. With the help of Olanike A. Mensah of **Mosaic Consulting**, PAF embarked on an ambitious effort to better align its HR policies, practices, and resources with the organization’s approach to health equity and its values of diversity, equity, and inclusion.

This case study provides an overview of PAF’s effort to center equity in its HR practices and policies, including why Chambers and Walker felt it critical to include this dimension in their ELL work, how the HR-focused equity work was carried out, and what the organization hopes will change about its work — internally and externally — with respect to health equity. Not all organizations may have the capacity or readiness for this level of equity-focused HR work; Chambers, Walker, and Mensah all noted that the work is arduous and daunting, due in part to the many federal and state legal requirements that shape HR practice and employment law. But given the right conditions (e.g., senior leaders who have been empowered to do this work and expert assistance from someone like Mensah) PAF’s example shows that a more accessible, equity-focused approach to human resources is possible and worthwhile.



Centering Equity In Human Resources: Why It Matters

Beginning in 2020, the COVID-19 pandemic had a deeply disruptive effect on work practices and norms. Many employers that had been reluctant to embrace remote or hybrid working arrangements were suddenly faced with no other option. Simultaneously, workers deemed “essential,” such as healthcare professionals or those who provide essential services like groceries or gas, were still required to report to their jobs amid great uncertainty and personal risk.

During the pandemic, many in the workforce began to question the practices and policies that shaped their work life, such as family and sick leaves and a lack of flexibility in schedules. 2020 also spotlighted the issue of racial justice and equity, both through the horrific murder of George Floyd and the disproportionate health and economic impacts of the COVID-19 virus on people of color in the United States.

Prior to the crises of 2020, however, there was already a growing body of evidence on the multiple benefits of addressing diversity, equity, and inclusion (DEI) in the workplace, including areas of focus such as [leadership development](#) and HR policies and practices. Although DEI programs overall have become a lightning rod in America’s ongoing culture wars — especially since the Supreme Court’s 2023 decision on affirmative action in higher education — [the majority of Americans believe that focusing on diversity, equity, and inclusion in the workplace is a good thing.](#)

Applying an equity lens to HR has the potential to clarify who an organization’s policies and practices are meant to serve and to what end. Many HR policies and practices stem from an organization’s desire to comply with existing laws and policies and to avoid possible litigation or other legal measures resulting from noncompliance. While these considerations are real and unavoidable, HR policies and practices can also serve as an opportunity to support employees, providing clarity on what to expect from the organization and reflecting the diverse cultures and backgrounds that may shape employee conduct and life events. When combined with legal and compliance considerations this framework can mitigate the potential harm of HR policies when they are mis-applied or misunderstood.

Among all the ELL participants, PAF stood out as the only organization that centered this particular dimension of equity work. As Chambers, Walker, and Mensah all noted when interviewed for this case study, many organizational leaders are simply too intimidated to take on a complete review and overhaul of HR policies and practices. For HR professionals especially, altering even one system — adopting new performance management software or negotiating with a new benefits provider, for example — can be prohibitively time-consuming and costly. “Reviewing and updating all of the policies and practices in an HR manual can feel like too big of a stone to move,” said Walker. “You are asking for a lot of people to work together to examine so many policies and procedures that affect your biggest asset: your people.”

However, as Mensah pointed out, while the level of effort required may feel daunting to most, the potential rewards are huge. “HR functions, practices, and policies touch every single employee in an organization,” she said. “As someone who has been consulting in the diversity, equity, and inclusion space for a long time, I have seen how some organizations are simply not ready for the type of work that PAF did.”



Many organizations start and stop at hosting courageous conversations about equity instead of engaging in more multi-dimensional, longer-term learning efforts. But conversations, while important, don't necessarily lead to structural changes. Changing HR policies and practices to center people and equity carries the possibility of longer-lasting impacts.

– **Olanike A. Mensah**
Mosaic Consulting

For Chambers, the Executive Vice President of Health Equity Initiatives and Community Engagement at PAF, there was one overriding reason to work on the human resources dimension. “Our entire mission at PAF is about health equity for the people we help: our external audiences, who often face financial and other types of barriers to accessing healthcare,” she said. “The more successful we were at achieving our mission, the more I worried that we were not mirroring on the inside what we were trying to do on the outside. I felt that we had to center equity for our staff in the same way we were trying to center equity for our patients.”

Equity-Centered HR Work: The Employee Handbook Overhaul

Before participating in the ELL, Walker recalled initiating a few HR measures focused on diversity, equity, and inclusion during her tenure at PAF, such as changing the requirements for promotion so that highly-qualified candidates would not need a college degree to be eligible. However, the HR-focused effort undertaken by Walker, at the urging of Chambers and with the help of Mensah, far exceeded the scope and effort of any previous equity-focused HR changes. The HR-focused work had several parts, such as developing an equity value statement, adding “equity” to the core values, designing an equity learning path for leadership, and a series of leadership trainings and staff workshops. But the work’s largest and most resource-intensive component was the overhaul of the employee handbook. In fact, the ELL, which supported its funded partners with consultants, coaches, and resources, only comprised part of PAF’s total effort. Once Mosaic completed a comprehensive review of the employee handbook, with specific recommendations about what to change and why, Walker and Chambers successfully advocated for PAF to support the actual revision of the manual, which eventually became an all-digital resource.

Mosaic’s review of the handbook was intentionally opportunity-focused, meaning that it was focused on a positive goal: to help PAF achieve greater alignment between its HR approach and its stated values around diversity, equity, and inclusion. This goal differs from the more traditional approach to developing HR policies and practices in response to compliance and legal concerns, which can produce a tone that employees often read as punitive and harsh. By contrast, the stated objective of Mosaic’s review was as follows:

Our objective was to review select personnel policies and procedures in order to flag opportunities to better align them with your diversity, equity, and inclusion workplace goals. Our approach was to uncover policies that, as written, may hinder your ability to create a more equitable and inclusive workplace environment and culture.

Mosaic would look for opportunities to embed equitable values and processes into workplace policies related to including marginalized identities and addressing organizational culture. In the realm of HR and people practices, Mosaic would consider how the practice or policy could be more precise and less cumbersome or antiquated in tone/nature, while still considering legal compliance.

After Mosaic completed a thorough review of the employee manual, they made the recommended revisions, a process PAF self-funded. They noted that “the most significant equity issue that the PAF handbook faced was its inaccessibility in terms of language, format, and size.” The handbook was shortened, re-sequenced, and much of the tone was shifted to be less harsh and punitive. For example, Mosaic reported that the old handbook began with “a strongly-worded section on drug and alcohol use, in essence setting the tone for the handbook being all about RULES, instead of a balance of rules and benefits.” This section was consolidated with other rule-focused sections and moved further back in the handbook. The beginning section now sets a relational tone, followed by expectation-setting, before getting into rules and potential consequences. All content was reviewed and revised with the goal of eliminating HR jargon or unnecessarily harsh language. Mosaic also offered several areas where policy changes should be considered in service of greater equity, such as enhancing the 90-day introductory period and softening the eligibility criteria for vacation payout.

The process of overhauling PAF’s employee handbook took nine months from start to finish. At times, the work felt “agonizingly slow,” admitted Chambers. She and Walker took great pains to communicate with their leadership colleagues and with the entire staff about the work they were doing. When the revised handbook was complete and ready to launch, Chambers and Walker recalled multiple efforts to communicate with staff about what to expect, why they had undertaken the effort, and their openness to feedback about the revised resource and all things equity-related at PAF. Following the handbook revisions, and in addition to the annual employee engagement survey, they created PAF’s first-ever survey on diversity, equity, and inclusion to get a better sense of how employees felt about the organization’s equity effort.

Finally, Chambers and Walker discussed at length their efforts to keep the entire leadership team, especially the CEO, Dr. Alan Balch and the president, Fran Castellow, informed about the scope and content of the employee handbook project. From the start, Balch had championed organizational equity, encouraging Chambers to take on and lead the ELL-supported work. Still, both Chambers and Walker felt it essential to secure unequivocal buy-in and support of both leadership and staff prior to the final review of the revised handbook by PAF’s external team of employment attorneys.

The legal review of the revised handbook highlighted the work needed to integrate an organization’s equity efforts with legal and compliance considerations. For example, the employment attorneys consulted by PAF were in favor of keeping all of the language from the previous version of the manual related to defining employee non-compliance and what the resultant punishments/penalties would be. Regardless of the topic - whether it was related to pay, timekeeping, employee behavior, or performance - the lawyers consistently favored specifying, in detail, all the ways that employees would be found non-compliant. PAF’s leaders, however, felt that they could apply their HR policies effectively and equitably with a different tone and set of messages.

“The lawyers weren’t entirely comfortable with all of the proposed revisions,” said Walker. “We were painstaking about staying compliant with federal laws like FMLA, ADA, and EEOC. In fact, we tried to go above and beyond what these laws protected, because it’s always good to be better than the federal government. In my experience, the vast majority of employment lawyers are not used to getting any pushback on their recommendations. But we felt we had no choice but to argue for what we believed was the right thing to do, which was to create an employee resource that was employee-centered, not one that was based on the lowest possible percentage of possible bad behaviors. And as a result, we were able to achieve compromises with our lawyers on their concerns, which we greatly appreciated.”

PAF’s approach to changing the employee handbook, including the final review by employment attorneys, illustrates an often-overlooked point: While organizations need to be in compliance with federal and state employment laws, it is ultimately up to the organization’s leadership to decide the level of risk an organization can bear with respect to compliance and legal action. It is also ultimately up to the organization’s to decide what tone and message they want to convey when aligning an organization’s culture and values with its practices and policies.



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– **Angela Walker**
Chief of Talent Management

² Family Medical Leave Act; American with Disabilities Act; Equal Employment Opportunity Commission. The first two acronyms refer to major federal legislation; the last is a federal agency with associated regulations and procedures that operate as law.

The Possible Benefits Of Centering Equity In HR

The bulk of the work supported by the ELL took place over two years. In some cases, the project accelerated and deepened existing equity-focused work or introduced new dimensions or phases. Organizational equity work is complex and multidimensional, and can feel like an ongoing, dynamic, and shifting endeavor with no clear endpoint. Progress on one dimension, for example, may signal that it's time to take on another.

In short, organizational equity work may not yield the same types of clear outcomes and defined time periods as an organization's other strategic initiatives. For example, if an organization seeks to redesign an internal process to be more efficient and quick, the metrics are fairly clear as to whether or not improvements occurred. Regardless, Chambers, Walker, and Mensah offered specific and focused thoughts about the possible impact and future benefits of reforming HR to be more equity-focused.

I think that in many cases, the employee manual is a binder that no one looks at after they receive it on their first day...But we wanted our handbook to be a resource for employees, one that reflected what we believed and the culture we wanted to have to support the work we do. I can tell you that before we did this, I hardly ever heard of people engaging with the handbook and now that it's online, fully available, and organized, we get lots of questions about it. I view that level of engagement as a good thing, that it's a living resource for employees.

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Chambers believes that addressing what she sees as a “profound disconnect” between an organization's desired culture and their HR policies and practices is powerfully symbolic. “HR is part of the backbone of any organization,” she said. “If you have an employee resource that feels aligned with what your organization's mission and purpose and values are, then I can't help but see that as an important contribution to internal well-being.”

For Mensah, who was an HR/talent professional before becoming an organizational consultant and DEI strategist, the success of efforts like PAF's employee manual overhaul might eventually be measured by “the absence of negative things that used to happen.” Given Chambers' earlier observation in her career about how employees have often experienced workplace trauma as a result of HR policies and practices, a potential indicator of positive impact could be a decrease or absence of those types of experiences. In this way, equity-

focused HR policies and practices could be compared to public health measures, which are often seen as most successful when diseases are contained, or when people stay healthy over longer periods of time.

Walker strongly agreed with Mensah’s hypothesis about how best to measure the success of HR-focused equity work. She revealed that while perusing the open comments section of PAF’s most recent employee engagement survey, she noted a complete absence of comments about favoritism, racism, or inequity, a noticeable change from previous years.

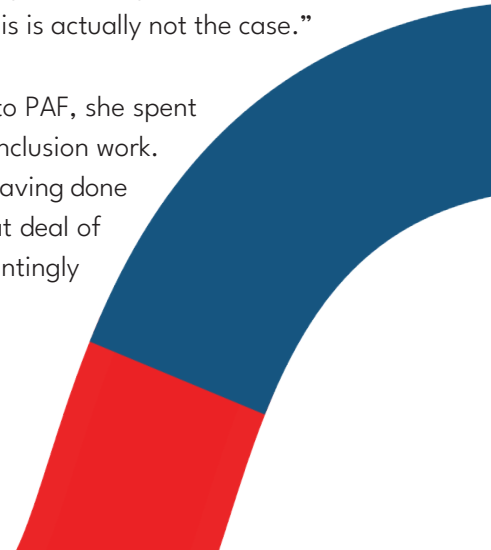
The Ingredients For Doing HR-Focused Equity Work

For organizations with the appetite and capacity to tackle the HR-dimension of equity work, PAF’s experience reveals a few foundational components of this undertaking.

AUTHORITY, POWER, AND COURAGE: Both Chambers and Walker are senior executives at PAF, having worked there for a number of years prior to the ELL work. They have a history of collaborating with and supporting each other. They also had strong support from Balch, the CEO of PAF, for leading organizational equity work. The seniority of their positions, their lengthy tenures, and their mutual trust were critical factors in deciding to undertake and follow through on the HR-focused equity work. Chambers’ decision to add HR to the three dimensions chosen by the staff affinity group is one example of the positive impact of their high level of authority and power. Another example is how Chambers and Walker advocated for PAF to fund components of the work not covered by the ELL support, such as the revising of the employee handbook. It is hard to imagine executive leaders without this level of stature, authority, and support making these same decisions.

An important prerequisite to courageous leadership is a sufficient level of authority. With enough power, leaders can make decisions that might initially seem risky. For example, after thoroughly vetting the revised employee handbook with staff and their executive colleagues, Chambers and Walker were able to successfully push back against some of the employment lawyers’ concerns and achieve a compromise. Mensah recalled her first role as a talent professional on a HR team many years ago, and the steep learning curve on employment-related law. “I remember being confused about what was actually law, versus what was a legal recommendation to avoid liability or to be in compliance,” she said. “Because of how complicated the legal and regulatory environment is around HR and employment, many people think that you can’t change your HR policies and practices to center equity and that you can’t question any recommendations or concerns from an employment attorney. But I think that PAF’s example shows that this is actually not the case.”

EXPERT GUIDANCE: Walker is a highly experienced HR professional; before coming to PAF, she spent several years at a large corporation with a deep commitment to diversity, equity, and inclusion work. Chambers came to PAF in 2014 to lead the organization’s work related to health equity, having done similar work at her previous job. Although Walker and Chambers have amassed a great deal of experience in work-based initiatives related to diversity, equity, and inclusion, both unstintingly



credit Mensah and Mosaic with helping guide them through the HR-focused equity work initially conducted as part of the ELL and eventually funded and sustained by PAF. “PAF does have an advantage over the large corporations in that we are a relatively small organization — just 200 staff — with a mission that is really all about equity for our patients. In other words, we don’t have a large bureaucracy that makes these types of sweeping changes difficult to take on,” said Walker. “That being said, I don’t see how anyone can do this type of work without the guidance of someone like Olanike [Mensah]. Her experience in both HR and diversity, equity, and inclusion was invaluable to our effort.”

PAF is currently in its third year of the equity-focused work started with the support of the ELL, with the employee handbook alone taking nearly a year to complete. Chambers, Walker, and Mensah all admitted that the work can at times feel arduous and slow due to the painstaking attention to detail needed to review the many policies and practices that make up an HR approach. However, all three still believe that this work was, and is, essential.

“There have been many laws and policies in our country’s history that began as part of a theoretical framework and resulted in creating great inequities in our society,” said Chambers. “I know that we’re still at the early stages of proving our theory that centering equity in human resources can help lessen the harms and injustices of the past. I look forward to seeing what this work will yield down the line when it comes to helping all of PAF’s employees feel as if HR is meant to truly support them.”

