

advancing equity: navigating new terrain

- ▶ transforming programs through an equity lens



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about VentureWell



At VentureWell, we envision a world in which science and technology innovators have the support, training, and access to networks and resources they need to solve the world's most difficult problems. We foster collaboration among the best minds from research labs, classrooms, and beyond to advance innovation and entrepreneurship education and to provide unique opportunities for STEM students and researchers to fully realize their potential to improve the world.

Since our founding in 1995, we've supported more than 12,000 early-stage innovators and helped launch over 2,300 ventures that have raised \$1.8 billion in funding. These ventures have reached millions of people in over 50 countries with technological advancements in fields such as biotechnology, healthcare, sustainable energy and materials, and solutions for low-resource settings.

We are proud that leading institutions, from foundations to government agencies to major businesses, support our mission to transform higher education and technology entrepreneurship. The Lemelson Foundation, Bill & Melinda Gates Foundation, National Science Foundation (NSF), National Institutes of Health (NIH), and USAID are among those who recognize ours as a powerful model for supporting emerging STEM innovators and the entrepreneurship ecosystems that are critical to their success.

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about the series

Creating physical or virtual spaces, programs, and courses that welcome a diversity of perspectives, backgrounds, and approaches is critical for excellence in innovation and entrepreneurship (I&E). As many higher education institutions, entrepreneurship centers, and funders affirm, renew, or expand their commitments to diversity, equity, and inclusion (DEI), they are eager for strategies and solutions to advance DEI in their work.

In July 2020, VentureWell published the findings of a national study of promising practices we commissioned, which identified six interrelated action areas for advancing equity in higher education STEM I&E. We presented these in our report, **Advancing Equity: Dynamic Strategies for Authentic Engagement in Innovation and Entrepreneurship**, as a widely applicable blueprint for university-based entrepreneurship centers and programs that strive to broaden access pathways for early-stage innovators. Since then, we engaged I&E faculty and center directors in discussions of their experiences testing and implementing strategies and solutions on their campuses through a series of community conversations, facilitated by experts from the field. After these lively and compelling virtual discussions, we invited several presenters to form teams and to dig a little deeper into one or more action areas to develop resources for the field.

We are pleased to share the results of their work through our new series called **Advancing Equity: Navigating New Terrain**. The series includes:

- a presentation of two assessment tools designed to facilitate deep and thoughtful conversations among staff about how to integrate ongoing DEI practices and learnings into programmatic work;
- three personal narratives centered on catalytic events that propelled each author into deeper, more authentic personal and professional engagement around DEI;
- a creative illustration of multiple pathways to success in entrepreneurship, to represent and support student innovators from a broader range of backgrounds, interests, and lived experiences.

We invite you to adapt or adopt these resources to advance DEI in your campus and community, and share back with us what you are testing and learning.

*This series is made possible through the support of **The Lemelson Foundation**, our long-term partner in cultivating and supporting student inventors in higher education, with a shared commitment to advance equity in science and technology innovation and entrepreneurship.*



introduction

Tsai Center for Innovative Thinking at Yale (Tsai CITY) and VentureWell are two organizations that share the mission to support individuals who use innovation to solve the world’s most pressing problems. To live out this mission, both seek to engage and support individuals from a diverse range of backgrounds, identity markers, and lived experiences, especially those who do not have entrepreneurial support systems, resources, and access pathways to translate their ideas into ventures. The racial reckoning of 2020 has further ignited conversations around the systemic barriers that disadvantage members of underrepresented groups, and has shed light on the ways that organizations, often with the best of intentions, can ultimately reinforce and/or perpetuate inequities and exclusion. Planning tools that use and embrace an equity lens can support the authentic integration of DEI into centers and programs. Here, we are pleased to share two such examples of effective learning tools, piloted by Tsai CITY and VentureWell.

Tsai CITY’s **SERJ (Social Equity and Racial Justice, Appendix A)** framework is a set of guiding questions designed to help shape program design and outreach at Yale University. Its primary application is in the development of cohort programs: venture development programs, issue-focused intensives, and other longer-term experiences for student innovators. Tsai CITY uses the SERJ tool to guide collaborative conversations between programs and communications staff, during which best practices and recommendations are documented.



VentureWell’s staff collaboratively designed the **Equity Action Planning Tool (Equity APT, Appendix B)** to enable its program and functional teams to integrate DEI into their work. Special thanks to Lauren Gase, former Team Lead of Research & Evaluation at VentureWell, for her leadership in the development of this assessment tool, and to Quality Evaluation Designs (QED) who conducted the national study of promising practices to advance equity in innovation and entrepreneurship education, which we drew from to formulate the Equity APT. VentureWell chose to elevate the urgency of DEI from the lens of race, gender, and socio-economic background as the areas of starkest need in the U.S.-based Science, Technology, Engineering, and Mathematics (STEM) I&E ecosystem. We invite you to engage with these tools in ways that are most applicable to your campus or community.



advancing equity at Tsai CITY

Tsai CITY launched in 2017, with the mission “to inspire students from diverse backgrounds and disciplines to seek innovative ways to solve real-world problems.” Guided by this mission, we have focused on DEI in innovation from our earliest stages.

In our first four years, we have devoted significant energy to the process of translating this mission into tangible actions and practices. Our goal has been to operationalize our commitments to DEI in three primary areas—representative leadership, informed empathy, and inclusive participation. Early on, we established a DEI working group, composed of cross-functional team members. We’ve built practices that include implementing a set of community norms, arranging monthly staff training on topics from decentering institutional whiteness to effective listening, and creating shared resources for common questions like inclusive event introductions, digital accessibility, and metrics tracking.

By embedding best practices into standard workflows and operations across the organization, we hope to create sustainable systems that will scale along with our work as a whole. We’re also intentional about continuing to learn and to refine these best practices. We actively seek feedback from our community, and in many cases we’ve adjusted our practices based on this feedback. Input from community leaders at Yale’s Native American Cultural Center prompted us to rethink the framing of our land acknowledgements. Conversations with multiple stakeholders at Yale led us to adjust our approach to collecting data on gender identity. As we continue these conversations, respond to current events, and welcome new members to our community, this commitment to ongoing learning and iteration will be key.





advancing equity at VentureWell

For 25 years, VentureWell has been on a mission to cultivate a diverse pipeline of inventors, innovators, and entrepreneurs driven to solve the world's biggest challenges and create lasting impact. Since 2018, and with increasing intensity over time, we have been tackling an important question: who has access to, is supported, and is uplifted in science and technology (S&T) I&E programs—and who is not? In 2019, we committed to broader organizational goals to open the pathways to advancing DEI in our organization, our programs, and our field. We commissioned a national study of best practices in engaging student innovators from underrepresented groups. In July 2020, we published the findings in our report **Advancing Equity: Dynamic Strategies for Authentic Engagement in Innovation and Entrepreneurship**, which features a framework of six action areas as a widely applicable blueprint for university-based entrepreneurship centers and programs that strive to broaden participation among early-stage innovators and entrepreneurs.

In 2020, the police killings of George Floyd, Breonna Taylor, Ahmaud Arbery, and numerous other Black and Brown individuals, as well as the COVID-19 pandemic, brought issues of equity and systemic racism to light nationwide in a new way. We turned the mirror on ourselves to reflect on our own complicity in perpetuating these inequities and insufficiently addressing DEI within our work. We recognized that to be successful in advancing equity, we needed to shift our attention to our internal culture-building, as well as creating change within our programs. We learned quickly that DEI-related work functions like any other task—if we wanted to do the work, we also needed to build our collective skill set. Examples of building our competency included optional all-staff bi-monthly discussions on race, racism, and white supremacy culture; developing shared organizational definitions; and hosting a series of community conversations on advancing equity with experts in the field. While these efforts were distinct from our programmatic work, they were critical in normalizing engagement around these topics, fostering a shared language among our staff, and creating necessary time and brave spaces for knowledge-sharing and storytelling.

In 2020, VentureWell began to adopt several new programmatic processes to enhance our work and to expand the participation, inclusion, and support of historically underrepresented, underestimated, and underresourced faculty and students in S&T I&E—specifically those who identify as Black, Latinx, and Indigenous; women of all backgrounds; and individuals from low-income backgrounds. The work has been messy and unpredictable. But, it has also been intentional and consistent—and these features have been integral in making our fundamental changes trickle down into more aspects of our work. In the summer of 2021, we published an in-depth reflection on our key learnings during the past two years of intentional efforts to advance equity in our programs and in our organization.



Tsai CITY's Social Equity and Racial Justice (SERJ) Tool

As part of our work to embed DEI into our programs and operations, we adopted a Social Equity and Racial Justice (SERJ) process in 2018—adapting the tool from versions we had seen used in other spaces, such as social and civic innovation settings. The SERJ tool has undergone several iterations since it was first implemented.

Phase One

When we first adopted the SERJ tool, we asked each program manager to complete a comprehensive SERJ checklist as part of planning each cohort program they ran. This comprehensive checklist, which was structured by “what, who, where, why, and how,” covered detailed questions in areas such as:

- program content and how it might affect underrepresented populations differently
- impacts on, and involvement of, different stakeholders
- root causes of inequities related to the program or its topic
- recommended approaches and metrics

While the incorporation of the SERJ tool helped establish DEI as a key component of our core planning processes, we also encountered barriers in this first iteration. Some program managers found the SERJ checklist overwhelming, either because of its length and scope or because they were completing it individually as opposed to collectively. Other program managers, already navigating shifting workflows as we piloted new processes, forgot to complete the SERJ checklist. Without any checkpoints or accountability, it often slipped through the cracks.



Photo: WOCinTechChat.com

Phase Two

We moved from asking program managers to independently complete the full checklist to translating this tool into a conversation between each program manager and members of Tsai CITY's DEI working group. The checklist was streamlined to better reflect the positioning of Tsai CITY programs and the most relevant questions and areas of discussion (based on the patterns we saw in Phase One); it allowed the program manager to focus on a smaller subset of key questions when preparing for the meeting. During the meeting, the program manager walked through responses to these questions and DEI working group members offered feedback and input. This approach provided shared accountability and improved process outcomes, as program managers were better equipped both to surface insights and to translate these insights into specific changes in program design and planning. The meetings also highlighted the significant overlap between considerations for planning programs and for marketing programs—an insight that led to our current SERJ process, which brings together program and communications/marketing staff for a unified conversation.



Phase Three

In its current form, the SERJ is a fully collaborative process. Midway through the program planning process, program managers meet with Tsai CITY’s communications director and, on occasion, other members of the DEI working group. During this meeting, the group talks through the tool’s streamlined questions, which brings together program design considerations and a discussion about outreach to a diverse range of communities. Notes from this meeting, which highlight recommendations and link to key resources, are turned into a shared document that outlines action items and can be referenced by program managers at any point in the program process.

The current SERJ tool includes the following questions:

Program Design

- Who is underrepresented in the field this program addresses, and what does existing data tell you about the status quo?
- How has the content been designed?
- Have stakeholders from different communities been informed/involved/represented in the design of this program?
- Is your lineup of speakers, judges, or other key guests diverse (considering multiple dimensions of diversity, such as race/ethnicity, gender, educational/career pathways, and others)? How did you arrive at this lineup?
- How will the logistical requirements of your program—such as physical location/space and timing/schedule—affect participation? Are there audiences who may face barriers to participation because of these elements?
- How have you designed your selection process, and how will that affect the program? How have diversity and equity factored into your thinking here?

Outreach

- Who do you currently do a good job of reaching? Who’s well represented in this program currently (or in past iterations)?
- Who should we do a better job of reaching? Who’s underrepresented in this program currently (or in past iterations)?
- When you think about “good response,” what does that look like in terms of numbers?
- Outreach next steps (brainstorm and assign outreach to specific channels/communities).





program implementation

We have taken an iterative approach to all of our work at Tsai CITY, and the SERJ process is no exception: the tool’s design and its implementation in our programs have informed each other, creating a feedback loop that has allowed us to refine the tool for maximum impact. At this point, we have incorporated the SERJ tool into our program planning checklist for all cohort-based programs. This includes our venture development programs (Tsai CITY Launchpad, Accelerator, and Summer Fellowship) as well as our rotating lineup of intensives (multi-week deep dives into specific topics, from climate innovation to financial modeling).

As an example of what this looks like in practice, we’ll walk through the Fall 2020 implementation of the SERJ tool in planning for two new intensives: Storytelling with Spreadsheets (an introduction to financial modeling for startups) and Storytelling with Slides (an introduction to pitching for startups). Both intensives were hosted virtually and open to the general public, not just to Yale students.

The process began when the program manager for these intensives, following our cohort program planning checklist, scheduled time for a SERJ conversation. This conversation included the program manager, Tsai CITY’s communications director (who is also a member of the DEI working group), and two student employees who helped plan and coordinate the intensives. Our communications director facilitated the conversation, walking through the SERJ’s list of questions and taking notes throughout. The conversation provided space for additional questions, brainstorming on strategies, and recommendations based on organization-wide best practices. After the meeting, the communications director sent a Google Doc capturing notes, key recommendations, and agreed-upon action items to all participants. Takeaways included:

- A conversation around inequities regarding whose ideas get invested in, with links to existing research on racial and gender gaps in startup pitch success, access to capital, and other relevant topics
- A recommendation to avoid over-assuming knowledge and to avoid jargon
- Links to digital accessibility resources for team discussion
- An outreach plan that included specific channels/ approaches for reaching New Haven community members who might not otherwise hear about or feel welcome in these programs



As the team continued to develop the program, this Google Doc served as a shared resource that all team members could reference. Ultimately, the program served a unique mix of Yale undergraduate and graduate students, Yale alumni, students from other universities, and interested community members, exceeding the team’s initial expectations for audience engagement. It also prompted some key insights, including the role of these open, virtual programs in encouraging active engagement among participants who may typically have faced barriers to access. These insights have since shaped the design of other Tsai CITY offerings, and will continue to inform future SERJ conversations.



VentureWell's Equity Action Planning Tool (Equity APT)

In 2020, we created our Equity Action Planning Tool for program and non-program teams to engage in a deep and intentional conversation about how to integrate DEI into their work. The Equity APT was designed to support teams in both examining existing efforts and identifying new opportunities—no matter the program stage. The tool includes specific questions for each program stage. The following represents a selection of questions from the Equity APT:

- **Reaching priority populations:**

- a. To what extent does VentureWell's focus on race, gender, and socio-economic background apply to the program?
- b. To what extent are we reaching priority populations? What is the current level of diversity (within each demographic characteristic) at each stage of the program?

- **Program recruitment, application, and selection:**

- a. How are participants finding/entering the program? What barriers exist/might exist for underrepresented groups in the application process?
- b. How are participants selected? What is the current level of diversity (i.e. representation based on identity markers such as, but not limited to, race, ethnicity, gender, socioeconomic status) of reviewers?

- **Program design and delivery:**

- a. Why do we have this program? What are the historical and structural drivers that influenced its development?
- b. To what extent do the program goals align with the stated needs/preferences of the target audience?

- c. Does/how does the program take into account diverse motivations and pathways for entrepreneurship?
- d. Does/how does the program create safe and inclusive spaces?
- e. What is the current diversity (e.g. race, ethnicity, gender, socioeconomic status) of program leadership? Instructors? Mentors?

- **Program Evaluation and Improvement:**

- a. What types of feedback opportunities are available to program participants? At what cadence and in what modalities? Are we soliciting feedback in ways that feel genuine and psychologically safe?
- b. Is/how is participant feedback incorporated into program improvement/refinement?





Central to the Equity APT's utility is its embedded focus on learning. Specifically, it is intended to be paired with discussions at a regular cadence or interval, in order for teams to actively reflect over time on what has been accomplished and learned. The tool also includes an opportunity to capture emerging questions, short- and long-term actions, and learnings. Questions can be answered in a variety of ways; for example, pulling from existing program data, looking into the literature, thoughtful group discussions, or getting feedback from program participants. A core component of the APT's intention to create an inclusive and equitable approach is that it is grounded in the perspective of those *directly impacted by the issue*. Often this means those individuals or groups whom the program serves or aims to serve. Gathering input directly from program participants (and non-participants from underrepresented groups) is likely to yield new and valuable insights.

In applying the Equity APT, program teams engaged multiple VentureWell departments (e.g., other program teams, marketing and communications, research and evaluation, data sciences, information systems, development) and gathered diverse perspectives. We believe that acknowledging and valuing the expertise of staff from all levels and vantage points is critical, and that the APT is not something that one or two people should fill out alone.

In reflection, this learning approach was central to our work because it created the conditions that allowed us to:

- Be imperfect and elevate opportunities to learn from mistakes.
- Provide regular space and time to grapple with ideas and questions.
- Recognize that answers may exist both within and outside of our organization.

- Develop and refine assessment techniques in tandem with program strategies.

program implementation

The implementation of the Equity APT began in Fall 2020 for two of our programs: E-Team Grant Program, grant and training programs for early-stage innovators; and Faculty Grants, which support faculty with innovative ideas for S&T I&E courses. Facilitated by the research and evaluation team, the implementation of the Equity APT began with a series of conversations to capture a baseline about how DEI strategies have been considered in all aspects of the program. Subsequently, program teams met at monthly or quarterly intervals and consulted other VentureWell departments along the way.



We learned that asking questions, listening, and being responsive to faculty and students' experiences is critical to improving our work. Both program teams quickly realized that when it comes to DEI-related work, we often don't know what we don't know. In engaging in the exercise of understanding our baseline, we recognized that we needed to do a lot more work to ask the right types of questions to the individuals we serve (or those that we seek to serve), and to listen deeply to their responses.



Based on one Equity APT discussion focused on the question *how does the program take into account diverse motivations for entrepreneurship?*, the E-Team program team built in new program content to emphasize the importance of DEI within venture development. Examples of these strategies included developing new modules and pre-work readings on understanding and fostering the value of DEI (both as part of a team and within venture structures), and conducting a deep review of how program materials, mentors, or guest lecturers reflect (or don't reflect) different lived experiences. These efforts were tracked in the Equity APT.

Based on another E-Team program conversation guided by the Equity APT, which contemplated *is/how is participant feedback incorporated into program improvement/refinement?*, we became more intentional about assessing our new strategies in order to determine effectiveness. The research and evaluation team worked together with the program team to draft closed- and open-ended survey questions to receive feedback on these new efforts. We learned through these assessment efforts that one of the strategies—the diversity pre-work—was uncomfortable for a few participants who identified as people of color. In particular, one participant said the new pre-work did not appear to be “for them.”

In response to this feedback, the research and evaluation team followed up with this participant to learn more about their experience. The pre-work content largely focused on the importance of diversifying one's network, so that entrepreneurs can build teams that represent a range of backgrounds, skills, and life experiences. The participant suggested that this narrative was geared toward white entrepreneurs, because 1) entrepreneurs of color are the “diverse network” described within the article, and 2) “diverse networks” may not always be the safest for people of color, because many people of color experience implicit and explicit forms of racism (Sue, 2010)¹. Additionally, the participant shared that

having spaces that include only people of color can be supportive in creating a sense of belonging within entrepreneurship. Within this conversation, issues of tokenism, safety and belonging, the problem with the “business case for diversity,” and the challenges of being a person of color in entrepreneurship also emerged.



Photo: WOCinTechChat.com

This additional feedback was brought back to the team during the monthly E-Team Equity APT meeting for discussion. The conversation was difficult, required a lot of processing, and was further complicated by the fact that the feedback was shared directly with the one person of color on the VentureWell team, who then had to deliver the information to her white colleagues. We were careful to sit with our collective discomfort before jumping into solutions. We discussed what the pre-work implicitly communicates to participants of color, which is not initially something we had considered. We discussed the desire to make sure that everyone feels seen and included in the E-Team workshop and workshop materials. After this learning discussion, the program staff revised the pre-work with a specific eye toward the audience, and also decided to introduce a new strategy around creating opt-in affinity groups in the context of the workshop. These revised strategies were brought back to the monthly Equity APT meeting, and we are in the process of testing them. We also closed the loop with the participant to share how we adapted our program content and shared our gratitude for their time, energy, and feedback; this follow up conversation was well-received.

¹Sue, D.W. (2010) *Microaggressions and Marginality: Manifestation, Dynamics, and Impact*. John Wiley & Sons.



Tsai CITY's outcomes and key lessons learned

Embedding the SERJ tool into our program planning has yielded real value for our team. Key outcomes include:

- *Embedding and prioritizing DEI within the planning process of many of our signature programs.* The SERJ conversation is now included in our cohort program planning checklist, alongside other essential elements like setting a schedule or booking speakers. This ensures we're thinking about DEI, and taking tangible steps to incorporate best practices into our operations, from early in the planning process.
- *Sharing best practices and resources across our team.* In the scramble to move to virtual programming in 2020, several team members individually sought out or learned about best practices for Zoom accessibility. The SERJ process has provided a space to gather those best practices and share them across our team.
- *Integrating program planning and outreach planning.* Immediately after a discussion of audiences we should do a better job of reaching, the SERJ conversation moves to tangible actions: we brainstorm specific channels and approaches for engaging those audiences, and assign tasks to all team members. This aligns everyone on outreach goals and ensures we all leave with key next steps.
- *Creating space for ongoing, collaborative conversations around operationalizing DEI.* For example, we've held SERJ conversations for our **Accelerator** since 2018. These continuous check-ins have allowed us to track trends, progress, and challenges, and to create new tools—such as processes for tracking applicant data from semester to semester, refining application processes that lower barriers to entry for students, and more.

has also taught us essential lessons. As we continue to grow, we'll focus on carrying these lessons forward.

- *Tightly linking DEI processes like the SERJ to other workflows.* The SERJ process has become an effective tool for cohort program planning, and has helped shape elements of other core workflows like event planning or mentor outreach. As we refine our full portfolio of workflows, we'll work to fully integrate specific DEI processes, drawing on the lessons learned through the SERJ's implementation.
- *Understanding that the SERJ is one part of a larger conversation, not a box to be checked.* One of the biggest benefits of moving from our original SERJ checklist to our current process is that it frames the SERJ as the opening of a collaborative discussion, rather than as a discrete task that can be marked complete. We hope to build more prompts and spaces for this continuing discussion, to ensure that reflection and accountability are built into processes—not just for planning programs, but for program execution and evaluation as well.
- *Connecting the SERJ to key goals and metrics, and following up to measure success.* Currently, the SERJ includes space for discussion about a program manager's goals around outreach and representation. Going forward, we aim to further tie SERJ processes to core Tsai CITY DEI goals, and to ensure that we have clear steps for measuring success against these goals.
- *Committing to ongoing learning and feedback.* As in all of our work, we're committed to incorporating feedback in our SERJ process and into inclusive program development overall. Staying open to new approaches to programming and outreach—and being willing to continuously learn from community perspectives—will be essential as we continue to scale our impact in the coming years.

The process of implementing and refining the SERJ tool



VentureWell outcomes and key lessons learned

As we piloted the Equity APT, we worked to capture learnings and identify opportunities for further development, to establish a process that could be used across the organization. As the two initial program teams identified and tested strategies, they shared successes and learnings with other VentureWell teams that helped us refine and strengthen the tool.

Key outcomes of the implementation of the Equity APT include:

- *Utilizing the Equity APT as one of many efforts to support our organizational DEI goals.* We understood that the Equity APT alone was not sufficient to move our DEI goals forward. The Equity APT has functioned as a program effort alongside both internal (staff knowledge, organizational policies, and practices) and external strategies (how we communicate about advancing equity to external audiences). These efforts must all work in tandem to help us move our organizational DEI goals forward.
- *Enabling the seeking of hypotheses and answers internally and externally.* The use of the Equity APT highlighted the wealth of internal resources we had to enhance our DEI learning within our own organization, and the necessity to fill our existing gaps in knowledge and perspectives by forming partnerships with other organizations. By seeking out answers internally and externally, we were able to learn more about our current work, and how we can move closer to our equity goals.
- *Tracking DEI outcomes and learnings in a systematic way.* We were intentional about how to understand our efforts. Whether it was through quantitative data, qualitative data, or learning discussions, one of the main outcomes that emerged from the tool was the ability to codify data, findings, and learnings to help move our work forward.

Moreover, the process of engaging with the Equity APT has emphasized that we must commit to the following approaches and mindsets in order to be successful in this work:

- Being open to learning from each other and those outside of VentureWell
- Getting comfortable with imperfection
- Listening to our stakeholders and constituents and being responsive to their feedback
- Asking questions and intentionally seeking answers to those questions
- Pursuing new assessment strategies in tandem with new program strategies
- Reflecting on the interconnections between internal culture-building, programmatic DEI work, and external field-building to ensure our strategy and approach is aligned with our broader organizational goals





conclusion

The SERJ Framework and the Equity APT are two examples of tools that I&E programs, centers, and organizations can use to actively break down barriers for innovators from underrepresented groups in mindful and intentional ways. Putting these tools into practice has emphasized the crucial importance of moving beyond a checkbox in doing DEI work, toward an integrated approach that centers continual reflection, iteration, and learning. The implementation of these tools also highlights the need to embed reflection and learning into the workflow along with other critical steps in the planning and execution of programs. Assessing and measuring these efforts must be central to the work in order to learn and grow.

We encourage you to use these frameworks to take action. Reflect with your staff and students on which elements are most resonant, and adapt them to best fit your campus or community context. We would love to hear your thoughts on these tools and your experience in implementing them. Please share your feedback, questions, insights, and experiences by reaching out to Kristen Golden and Shaheen Mamawala at equity@venturewell.org or Clare Leinweber, Executive Director of Tsai CITY at clare.leinweber@yale.edu. For more resources, please visit VentureWell's [Advancing Equity page](#).



Photo: WOCinTechChat.com



Appendix A: **SERJ (Social Equity and Racial Justice)**

Program Design

- Who is underrepresented in the field this program addresses, and what does existing data tell you about the status quo?
 - How has the content been designed?
 - Have stakeholders from different communities been informed/involved/represented in the design of this program?
 - Is your lineup of speakers, judges, or other key guests diverse? How did you arrive at this lineup?
 - How will the logistical requirements of your program — such as physical location/space and timing/schedule — affect participation? Are there audiences who may face barriers to participation because of these elements?
 - How have you designed your selection process, and how will that affect the program? How have diversity and equity factored into your thinking here?
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Outreach

- Who do you currently do a good job of reaching? Who's well represented in this program currently (or in past iterations)?
- Who should we do a better job of reaching? Who's underrepresented in this program currently (or in past iterations)?
- When you think about "good response," what does that look like in terms of numbers?
- Outreach next steps (brainstorm and assign outreach to specific channels/communities):





Appendix B: Equity Action Planning Tool

Program Reflections

- To what extent does the focus on race, gender and socio-economic background apply to the program?
 - If this scope is not fully applicable, how is the program defining its priority populations with regard to demographics?
- To what extent are we reaching priority populations? What is the current level of diversity (on each demographic characteristic) at each stage of the program...
 - Applicants?
 - Participants?
 - Those who “successfully” complete the program?
 - Those who move forward to the next stage?

Program Recruitment, Application, and Selection

(keeping in mind the priority populations you just identified)

- How are participants finding/entering the program?
- What strategies are we using to promote the program?
 - How are the program and potential participants described or presented (visual and written formats)?
- What strategies are we using to recruit program participants?
 - To what extent are we using authentic and targeted outreach?
- How are we supporting potential participants in applying?
- What barriers exist/might exist for underrepresented groups in the application process?
- How are participants selected?
 - Where are there opportunities for conscious or unconscious bias in the selection process?
- What is the current level of diversity of reviewers?





Program Design and Delivery

- What are the program goals?
 - Why do we have this program? What are the historical and structural drivers that influenced its development?
 - To what extent do the program goals align with the stated needs/preferences of the target audience?
 - To what extent are the program goals determined by VentureWell vs an external party? Where do we have opportunities to influence the program scope/goals?
- If/how was the target population engaged in building the program?
- If/how does the program take into account diverse motivations for entrepreneurship?
- If/how does the program support individuals in developing as people (knowledge, skills, career path, network, etc)?
 - If/how does the program help participants build self-efficacy and confidence?
- If/how does the program create safe and inclusive spaces?
- What is the current diversity of program leadership? Instructors? Mentors? etc.

Program Evaluation and Improvement

- What types of feedback opportunities are available to program participants? At what cadence and in what modalities? (i.e. survey, interviews, informal conversation, etc)
 - How do we know whether these methods are effective? Are we soliciting feedback in ways that feel genuine and psychologically safe?
- What feedback have you received on the program? Are there trends or differences across demographic groups?
- If/how is participant feedback incorporated into program improvement/refinement?
- What types of information / whose perspectives are missing?





Action Planning

Based on your answers and reflections to the questions above, identify the highest priority areas/opportunities to further integrate DEI. Then consider:

Additional Information Needed

Identify additional information you need to collect - this can be information from participants, from others within your organization, from external partners, or from the literature. Consider: What information, if any, do you need to collect, before identifying action steps? Or can you collect information, while simultaneously beginning to test strategies? Should this information be elevated as an organization-level need? (If so, begin to explore organization-level opportunities/solutions.)

Short-Term Actions

One of the best ways to learn is to start testing! Begin by developing a work plan to further integrate DEI in the current fiscal year. These can be big or small steps - either way, you'll want to plan for how to examine their impact and identify what to do next. Make a note of how these actions do/do not align with current program goals, deliverables, or key performance indicators.

Long-Term Actions

Develop a workplan to further integrate DEI in the long-term, beyond this fiscal year. Identify opportunities, necessary structures, processes, and/or resources, critical first steps, and a project timeline. Think about how you will assess and measure success.

Issues to Elevate to the Organization

Note any areas/issues that need to be elevated to the organization level, such as data infrastructure needs, barriers/challenges presented by a funder, or need for additional resources.



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