



Information Technology Equity Project Management Tool

Goal: Ensure inclusiveness and the most effective product for our diverse internal and external customers by applying the principles of Race and Social Justice (RSJ) Equity to technology projects, with attention to:

- Employee Development
- Public Engagement
- Usability and
- Digital Equity (inclusion)

Purpose: Ensure that the principles of RSJ are incorporated into the project. The questions addressed in this document should be asked of all types of IT projects, whether infrastructure or applications, whether purchased or custom-developed. This document is intended to assist you in addressing these four overlying questions:

- 1) What diversity is there in who will be using the product(s)?
- 2) Does your Project team and process reflect this diversity?
- 3) How will you ensure your product development and selection is the best it can be for your diverse users and resolve any unintended barriers?
- 4) How will your outreach, training and support addresses the different needs of users of different groups of users?

How to use this Tool:

- Use the questions and notes to guide discussion and planning
- Fold into your existing project processes
- Start early in the initial scoping and then come back to use the tool throughout the project. This is intended to be an iterative process.

Contents:

- **Section I:** This section is intended to guide discussions with project team members to get a high-level assessment of the diversity of your stakeholders, their needs, and potential impacts of the project. This section includes:
 - **User Overview**
 - **Product and Vendor Assessment**
 - **Public Impact**
- **Section II:** This section contains the **Project Management Checklist**. This is a checklist and record of how RSJ principles are applied throughout your project. This section is filled out by the project manager to assess and track rsji-related actions and issues.
- **Section III:** This section includes a list of References and Resources.

Section I:

A. User Overview

Your responses to these questions give an overview of your target audience for this product. Use this information to inform your stakeholder analysis and communication plan. By assessing the diversity of your users early the project will be more successful in ensuring the Product development and selection is the best it can be for your diverse users and unintended barriers aren't created.

1. Who are your stakeholder and user groups? (e.g. public customers, application users, application owners (business), technical support personnel, system administrators)
2. Who are your users within these groups? Ask the following questions for each group identified above:
3. Are they of different racial/ethnic/cultural groups (see city demographics and HR for staff demographics)?
4. Will there be use by limited English speakers?
5. Will there be people with disabilities impacting their ability to use the product/solution?
6. What do you know about the level of experience and technical skills of your users and their culture?
7. What do you know about their approach to learning that will help or hinder their likelihood of fully adopting the proposed technology?

B. Product and Vendor Assessment

Your responses to these questions provide an assessment of the significance of RSJ issues in the selection of the vendor and product.

1. What product assessment has been conducted of the effectiveness, best practices or barriers to use by your diversity of users? Do potential product vendors have research reports, case studies or client referrals?
 - a. For the current product?
 - b. For a proposed replacement or new product?
 - c. Are there other available products which serve a similar audience?
2. What technical skills and degree of competency are required to use the proposed product/solution? Create a checklist of skills needed: for operators and end users if different.
3. What is the diversity on the development team?

C. Public Impact

Your responses to these questions provide insight into potential impacts to diverse groups within the community and how the product addresses them.

1. In what way will this product support or hinder civic participation (public engagement) in government and community affairs by diverse users?
2. Are there any cost implications for users? If needed, what effort will be made to address the needs of low-income users?
3. What technology requirements are there for end user bandwidth, hardware or software to utilize this product? Do low-income members of the public have sufficient access to the necessary bandwidth, hardware or software?
4. Will this require upgrade or purchase of service or device to use the service (e.g. who gets texting costs)?
5. What options or strategies are there to address the impact of these requirements?

Section II. Project Management Checklist

The items in this checklist are organized by the phases of the Project Management Lifecycle. Each section should be filled in by the Project Manager during the applicable phase of the project. Include additional comments as necessary to provide the best answer.

| ID | Project Phase | Question | Project Manager Comments | Open | Complete |
|----|--|---|--------------------------|--------------------------|--------------------------|
| 1 | Initiation: Charter | Do the Goals, Objectives, Scope, and Deliverables in your Charter reflect the product/solution's required diversity and inclusiveness? | | <input type="checkbox"/> | <input type="checkbox"/> |
| 2 | Initiation | Does your Project Sponsor and Steering Committee understand and support such Goals, Objectives, Scope, and Deliverables? | | <input type="checkbox"/> | <input type="checkbox"/> |
| 3 | Initiation: Stakeholder Analysis | Does your list of project stakeholders include the diverse user communities identified? [See Section 1 – User Overview questions] | | <input type="checkbox"/> | <input type="checkbox"/> |
| 4 | Initiation | Does your Steering Committee have appropriate representation from these diverse communities? | | <input type="checkbox"/> | <input type="checkbox"/> |
| 5 | Initiation: Charter | Do your high-level estimates for cost and schedule allow for additional scope related to inclusiveness? | | <input type="checkbox"/> | <input type="checkbox"/> |
| 6 | Planning: Communication | Does your communications plan provide sufficient information, outreach, and notification to diverse users and stakeholders? Is the method and format of communication appropriate? [See Section 1 – User Overview questions] | | <input type="checkbox"/> | <input type="checkbox"/> |
| 8 | Planning: Communication | Are there leaders or representatives who are people of color or otherwise represent your diverse users and stakeholders whom you could check-in with for feedback on your communications? | | <input type="checkbox"/> | <input type="checkbox"/> |
| 9 | Planning: Communication | How will you ensure diverse users are notified and worked with to understand the change (or interruption of service)? | | <input type="checkbox"/> | <input type="checkbox"/> |

| ID | Project Phase | Question | Project Manager Comments | Open | Complete |
|----|-----------------------------|---|--------------------------|--------------------------|--------------------------|
| 10 | Planning: Requirements | Is there a suitable mechanism for gathering requirements from diverse users? How does this take into consideration their experience articulating needs, time available, and any approval needed to participate? | | <input type="checkbox"/> | <input type="checkbox"/> |
| 12 | Planning: Requirements | What expectation of behavior or workflow change will there be? (e.g., having to learn a new system or submit content online)? | | <input type="checkbox"/> | <input type="checkbox"/> |
| 13 | Planning: Acceptance | Have you identified Acceptance Criteria related to the diverse user base and will these users have a role in product/solution acceptance? | | <input type="checkbox"/> | <input type="checkbox"/> |
| 14 | Planning: Design | Does the design build in any unique requirements identified for diverse users, including special accommodation, translation, user interface, learning style, reports, content and format, and business process changes? | | <input type="checkbox"/> | <input type="checkbox"/> |
| 15 | Planning: Testing | Does your test plan & scripts include testing of requirements unique to diverse users? Is there inclusion of diverse user communities in UAT (User Acceptance Testing)? | | <input type="checkbox"/> | <input type="checkbox"/> |
| 16 | Planning: Training | Will you address any unique diversity requirements in your training delivery and training materials as well as user documentation? | | <input type="checkbox"/> | <input type="checkbox"/> |
| 17 | Planning: Training | How will you engage members of the diverse community in designing and delivering the training? | | <input type="checkbox"/> | <input type="checkbox"/> |
| 18 | Planning: Implementation | Are there any special deployment needs related to a diverse user base? | | <input type="checkbox"/> | <input type="checkbox"/> |
| 19 | Planning: Implementation | What installation will there be and will it be in a diverse neighborhood? | | <input type="checkbox"/> | <input type="checkbox"/> |
| 20 | Planning: Implementation | How will it influence parking, traffic, public facilities? | | <input type="checkbox"/> | <input type="checkbox"/> |
| 21 | Planning: Project Team | Is there an opportunity to place a staff member on the Project Team to provide career growth or new skills? | | <input type="checkbox"/> | <input type="checkbox"/> |

| ID | Project Phase | Question | Project Manager Comments | Open | Complete |
|----|---------------------------|--|--------------------------|--------------------------|--------------------------|
| 22 | Planning: Project Team | Do any of the project tasks identified require special skills on the Project Team (e.g., someone who speaks other languages for communications and/or requirements gathering, a developer with experience building accommodation into a user interface)? | | <input type="checkbox"/> | <input type="checkbox"/> |
| 23 | Planning: Project Team | As part of the extended project team, is there a focus or advisory group representative of user diversity to guide and shape the product and its rollout? | | <input type="checkbox"/> | <input type="checkbox"/> |
| 24 | Planning: Project Team | Is there someone on the Project Team who is responsible for monitoring/facilitating the application of RSJ principles? | | <input type="checkbox"/> | <input type="checkbox"/> |
| 25 | Planning: Project Team | Does the Project Team require any special training in RSJ? | | <input type="checkbox"/> | <input type="checkbox"/> |
| 26 | Planning: Schedule | Are all the diversity-related tasks you identified now represented on the project plan, and has sufficient time been allowed in the project schedule to accomplish these tasks? | | | <input type="checkbox"/> |
| 27 | Planning: Costs | Have you budgeted for these unique and/or additional tasks and resources? | | <input type="checkbox"/> | <input type="checkbox"/> |
| 28 | Execution | Have you considered WMBE vendors when selecting and contracting products/solutions and contractors? | | <input type="checkbox"/> | <input type="checkbox"/> |
| 29 | Execution | Are you regularly checking in and getting feedback from diverse users during project execution, and is that input resulting in improvements or course corrections? | | <input type="checkbox"/> | <input type="checkbox"/> |
| 30 | Execution | What user-centered design and equipment will be applied? | | <input type="checkbox"/> | <input type="checkbox"/> |
| 31 | Execution | What could be implemented to better enable limited English speaking users? (e.g., visual or audio interface, translation or interpretation for product or training). | | <input type="checkbox"/> | <input type="checkbox"/> |
| 32 | Execution | Have you considered gender roles, image choices, literacy level or other cultural and skill level factors? | | <input type="checkbox"/> | <input type="checkbox"/> |

| ID | Project Phase | Question | Project Manager Comments | Open | Complete |
|----|---------------|--|--------------------------|--------------------------|--------------------------|
| 33 | Execution | What could be implemented to better enable disabled users? (e.g. trackballs for limited mobility, optional text size, contrast, audio/video, design for speech synthesis, ADA compliant design, access to assistive technologies)? | | <input type="checkbox"/> | <input type="checkbox"/> |
| 34 | Closeout | Are you collecting input from diverse users when documenting Lessons Learned? | | <input type="checkbox"/> | <input type="checkbox"/> |
| 35 | Closeout | As part of Lessons Learned, are you reviewing the application of RSJ to this project and identifying areas for improvement to this process? | | <input type="checkbox"/> | <input type="checkbox"/> |
| 36 | Closeout | Have you done outreach to diverse user communities through a survey, focus groups, etc., to gauge the product/solution's success? | | <input type="checkbox"/> | <input type="checkbox"/> |
| 37 | Closeout | Is there a plan for soliciting ongoing feedback from and measuring longer-term benefits to diverse users? | | <input type="checkbox"/> | <input type="checkbox"/> |

This Information Technology Project Management Checklist was produced as a City of Seattle Department of Information Technology (DoIT) Race & Social Justice Initiative project by David Keyes, Bruce Blood, Amy Doerzbacher, Julie O'Brien and Mark Schmidt with input from Ellie Miller. This checklist draws from the Racial Equity Toolkit and the Inclusive Outreach and Public Engagement (IOPE) Toolkit developed for the City of Seattle Office of Civil Rights led Race & Social Justice Initiative (seattle.gov/rsji/) Content was also drawn from the Washington State Access to Justice Technology Principles and Project (www.atjweb.org/atj-technology-principles). This City of Seattle RSJI Project Management Checklist was approved by the DoIT Project Management Office Steering Committee on November 12, 2009.

D. References and Resources

- **Seattle Information Technology Access and Adoption Indicators Project:**
<http://www.seattle.gov/tech/indicators/>
- **2010 Seattle Census Info - Seattle Population Demographics:**
http://www.seattle.gov/dpd/Research/Population_Demographics/Overview/default.asp
- **Seattle Office of Civil Rights**
<http://www.seattle.gov/civilrights>
- **Translation & Interpretation:**
<http://www.seattle.gov/rsji/immigrants/translation.htm>
- **Race and Social Justice Initiative:**
<http://www.seattle.gov/rsji/>
- **Inclusive Outreach and Public Engagement (IOPE):**
<http://www.seattle.gov/rsji/docs/IOPE%20guide%2001-11-12.pdf>
- **RSJI Equity Toolkit (RET, formerly known as the Budget Filter):**
http://www.seattle.gov/rsji/docs/RSJIToolkit_3_10.pdf
- **Pew Internet and American Life Project**
<http://pewinternet.org/>

- **People:**
 - Your department's Race and Social Justice Change Team
 - Your own diverse staff
 - Inclusive Outreach and Public Engagement (IOPE) interdepartmental team
 - Department of Information Technology tool consultants
 - Seattle Office of Civil Rights (SOCR)
 - Community partners
 - UW Information School research centers and capstone students
<http://ischool.uw.edu/research/centers>

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