Development and Implementation of an Individual Equity Action Plan
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Category: Administration

Background: Equity and inclusion are essential to the Mayo Clinic institutional values of teamwork and respect. Nationally, the diversity, equity, and inclusion (DEI) landscape is constantly evolving. In order for our institution to lead in the DEI space, we too must constantly evolve, yet many individuals are not personally engaged in improving our institutional environment pertaining to diversity. Simultaneously, personal engagement by all is needed to improve the environment around people who are diverse and increase opportunities for recruitment and retention of such individuals.

Purpose: Led by the Mayo Clinic Office for Research Equity, Inclusion, and Diversity, this institutional action project was designed to develop, refine, pilot, and assess a Personal Equity Action Plan (EAP) to embed within annual reviews, providing a recurring behavioral nudge within a process that includes accountability and feedback.

Methods: Following conceptualization and development of the initial draft, we conducted focus groups with department and division chairs structured to gain feedback on the EAP concept, tool, and planned implementation. The resulting EAP tool included a definition of "diversity," a list of illustrative examples of personal DEI goals, and an implementation guide for the person leading the annual review. The illustrative examples include DEI and health equity topics spanning staff, students, patients, and research participants. The revised EAP tool was then brought to multiple committees in our matrix institution and further refined through feedback. Evaluation to date includes a survey of DEI leaders spanning the organization. Future downstream impacts will be assessed through changes in the biannual All Staff survey for belonging, culture of safety, and intent to remain at the institution among people of different demographic groups.

Results: Following extensive vetting, the EAP begins with a statement of purpose at the institutional level asking individuals to set a personal annual goal. This is paired with a definition of diversity as "groups at a negative power differential within United States society." Staff are asked to report on outcomes for their prior goal and set a new goal, for which they are aided by 36 illustrative examples spanning categories of My Actions, Help Others, Research, Education, Practice, and Institutional Culture. Among 12 DEI leaders, 100% agreed that "This will help interested individuals develop substantive and meaningful personal action plans" while 83% agreed that "Over time, this will lead to positive change in the environment around people who are diverse." DEI leaders also provided insights into how to shorten the tool to increase uptake and impact.

Discussion: We plan to continue to modify the tool and implementation guide based on feedback provided over time.

Conclusion: Culture change is challenging to initiate and sustain yet is integral to positive DEI changes. By embedding the EAP tool within annual reviews, we hope to both initiate action guided by the illustrative examples and sustain ongoing changes through behavioral nudges within an existing and widely used institutional system.