



## Article

# Central Coast Regional Equity Initiative: Co-Creating and Actionizing a New Community-Led Equity Framework

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**Abstract:** We present a community-led equity framework as a foundation for promoting equity on the Central Coast of California. We discuss the key elements of a participatory, community-led evaluation and planning approach for the Central Coast Regional Equity Initiative, which aims to advocate for social, health, environmental, and economic equity through region-wide cross-sector collaboration, community and research-informed action, and an indigenized and decolonized approach. Through a systematic mixed-methods evaluation and planning approach, including Community Consultations and Strategic Action Planning, we found that our community's lived experience contributes to a deeper understanding of inequities, and that engagement in cross-sector collaboration empowers our community to bridge data with action organizing. The findings demonstrate that engagement in community-led evaluation and planning contributes to a greater readiness for cross-sector collaborative action and a sense of community ownership of solutions to equity issues, and sets the stage for deeper-rooted, long-term success built on genuine reciprocity and trust. We present our community-led equity framework inviting others to adopt systematic community knowledge-base-building that values community wisdom, identifies power imbalance, promotes trust-building through healthy discomfort, and encourages reflective action.

**Keywords:** community-led approach; equity framework; participatory evaluation; regional equity; indigenous approach; policy advocacy; community organizing; strategic action plan; strategic planning; social justice



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## 1. Introduction

We are living in a time of unparalleled challenges on the Central Coast of California and throughout the world, as we grapple with the still-unfolding consequences of the COVID-19 pandemic, structurally embedded patterns and practices of systemic racism, and the immediately clear and present dangers of human-induced climate change. It is also a time to reassess and reorder our priorities considering the long-standing inequities these challenges have brought so starkly into view. The Central Coast region—which includes Santa Barbara, San Luis Obispo, and Ventura Counties—faces a multi-dimensional crisis of inequality that manifests in wages and employment, housing, criminal justice, education, environmental exposures, and access to healthcare. This crisis weighs most heavily on working-class communities of color. The depth and extent of these inequities were brought to the surface by the devastating, racially disparate impacts of the COVID-19 pandemic, but they are rooted in structural trends, policies, and practices that have been shaping regional fortunes for decades (O'Connor et al. 2022). The region also has a long and growing history of interconnectedness that reaches beyond our interconnected economies and history of regional activism—a history that is rooted in the genocide and colonization of the Chumash and Tatavium peoples. This colonization actively continues in the present day through continued Indigenous struggles for political rights, cultural recognition, and land protection, thus contributing to a continued

erasure of Indigenous ways of life and the perpetuation of inequities that significantly harm our region's Native peoples (O'Connor et al. 2022).

With this growing emphasis on structural inequities across the region, the Central Coast Regional Equity Initiative (CCREI) is a collaborative movement that aims to advocate for social, health, environmental, and economic equity through region-wide cross-sector collaboration, community and research-informed action, and using an indigenized and decolonized approach. By providing a community-led, data-driven analysis of the crises of inequity facing California's Central Coast, the CCREI helps advance a shared regional vision that recognizes the unique struggles and aspirations of the Central Coast's peoples and communities. We define "community-led" as an evaluation and planning process that centers community perspectives at a foundational level and leverages systematic processes to support community knowledge-base building through: helping community members frame questions, providing research path options, consistently seeking community feedback with a willingness to adapt methods, engaging community wisdom in the analysis process, and promoting collective community ownership of the planning and evaluation process. Community-led evaluation and planning contributes to a greater readiness for cross-sector collaborative action and a sense of community ownership of solutions to equity issues, and sets the stage for deeper rooted, long-term success (Kania and Kramer 2011).

There is an important intersection between policy and community-based participatory research that is needed to address health inequities (Cacari-Stone et al. 2014). Locally, Ventura County and Santa Barbara County both declared racism a public health crisis, but the Central Coast region lacks a community strategy to address racism and issues of structural inequity. The process of translating equity data into policy change is often difficult, which is why our approach to addressing inequities in the Central Coast continues to be rooted in direct community cross-sector collaboration. The previous literature stresses the importance of community engagement and how it involves more than just feedback, but rather seeking community wisdom and expertise to develop critical knowledge throughout the entire research project (Gordon da Cruz 2017). In addition, examples of successful cross-sector collaborations suggest that large-scale social change stems from better multi-sector coordination rather than an isolated intervention. Such examples also indicate that substantially more effective progress in addressing our most complex social problems could be made if nonprofits, government, businesses, and the public convened together around a common agenda aimed at collective impact (Kania and Kramer 2011).

In this article, we share our processes of community-led evaluation by involving a range of cross-sector participants to generate innovative ways of measuring process, impact, and outcomes (Springett and Wallerstein 2008). Our evaluation and planning team utilize the following CDC definition of program evaluation: "The systematic collection of information about the activities, characteristics, and outcomes of programs to make judgements about the program (or processes, products, systems, organizations, personnel, or policies), improve program effectiveness, and/or inform decisions about future program development", (Centers for Disease Control and Prevention 2011). Our evaluation and planning team asked, "how does the community's lived experience bring to light the depth and breadth of inequities in California's Central Coast?" Our evaluation and planning team sought to understand this through Community Consultations, which provided qualitative data to frame the priority issues areas of the CCREI's first report, entitled *Towards a Just and Equitable Central Coast*. This then led us to ask, "how do we address these inequities by effectively engaging diverse groups in collaborative action?" With previous studies indicating that cross-sector approaches foster long-lasting change, we engaged in a Strategic Action Plan (SAP) process, which was designed to emphasize a cross-sector collaborative approach to actionizing community-led solutions to the inequities elevated in the report. We highlight the key community contributions that informed the phases of data collection and demonstrate how adaptability in evaluation processes contributes to more robust and sustainable action.

## 2. Materials and Methods

### 2.1. Community Consultations

To inform the equity issue areas presented in the *Towards a Just and Equitable Central Coast* report, we conducted 16 Community Consultations, which were facilitated conversations that engaged 160 participants—including community members, local activists, and regional leaders—around how inequities are experienced and perceived by the people who live, work, learn, and participate in civic life in the Central Coast. The purpose of the report was to explore the breadth and depth of regional inequities, and the Community Consultations informed the report's contents, purpose, and frameworks, and influenced subsequent quantitative data gathering.

Participants for the Community Consultations were located through The Fund for Santa Barbara's existing networks and invited to participate via email. Community Consultations were co-facilitated by The Fund for Santa Barbara and The Blum Center of Poverty, Inequality, and Democracy at the University of California, Santa Barbara, and were conducted between August 2020 and March 2021.

The consultations spanned eight general sessions and eight issue-specific sessions covering K-12 Education, Public Higher Education, Racial Justice, Housing & Homelessness, Access to Public Health, Small Business, Climate Justice, and finally, Criminal Justice and Reimagining Community Safety. Community Consultations were conducted virtually, were recorded, and lasted 1.5–2 h. The discussions also explored how the murders of George Floyd and Breonna Taylor and the experience of the COVID-19 pandemic had exacerbated or otherwise brought existing inequities into sharp relief. The Community Consultations were a space for participants and facilitators to imagine change, informed by data, and create shared ideas about how to move toward a more equitable future.

While each consultation was unique, naturally dynamic, and free flowing, they all included a summary of the *Towards a Just and Equitable Central Coast* report and its aims, encouragement of an ongoing conversation, and some or all of the following questions:

- How has the pandemic affected your work?
- What information in our Equity Study would be helpful in your work?
- What are the highest priority issues for you?

These Community Consultations provided broad and nuanced insight into systems of inequity on the Central Coast. With the help of several interns of The Fund for Santa Barbara, the Community Consultation co-facilitators took extensive, concurrent notes. While these Community Consultations were not designed to be a representative sample of the Central Coast, they nevertheless provided the report with valuable guidance in its early stages and provided the basis for ongoing community engagement and organizing following the release of the *Towards a Just and Equitable Central Coast* report.

Following the release of the report in December 2021 and subsequent community discussions with participants in the CCREI throughout December 2021–August 2022, we recognized the need for a process of ongoing community engagement and organizing grounded in a unified equity agenda and a clear equity framework, and thus engaged in a community-led Strategic Action Plan (SAP).

### 2.2. Strategic Action Plan Process

The Fund for Santa Barbara partnered with Evolve Equity Psychology, Inc. to develop, facilitate, and implement the SAP evaluation and planning process. The goals of the SAP process were to encourage innovation, change, and knowledge creation to build sustainable and collaborative approaches to address the inequities elevated in the report. The SAP planning and evaluation process consisted of a systematic method for collecting, analyzing, and utilizing data to examine the effectiveness and efficiency of CCREI activities ([Centers for Disease Control and Prevention 1999](#)).

We utilized a mixed-methods and participatory evaluation approach with the intention to facilitate a community-led SAP process that strengthens cross-sector partnerships. Given the previous literature on community-based participatory evaluation and mixed-methods

designs for building cross-sector partnerships (Bryson et al. 2015; Parker et al. 2020), our team utilized a mixed-methods, community-based participatory evaluation approach to the SAP by collecting data through workgroup meetings, surveys, and individual interviews (Springett and Wallerstein 2008). Table 1 details all activities of the SAP process.

**Table 1.** Central Coast Regional Equity Initiative SAP Timeline.

August 2020 to March 2021	Community Consultations
December 2021	Launch of <i>Towards a Just and Equitable Central Coast</i> report
December 2021 to August 2022	Community Engagement through Central Coast Regional Equity Initiative
August 2022	Workgroup 1 (SAP)
August 2022	Survey 1 (SAP)
September 2022	Individual Interviews (SAP)
October 2022	Workgroup 2 (SAP)
October 2022	Survey 2 (SAP)
October 2022	Partnership for Excellence (SAP)
June 2023	Launch of Strategic Action Plan Report

The overarching methodology was grounded in an Indigenous approach, drawing upon values of reciprocity, respect, and interdependence with the natural world (Fast and Kovach 2019; Wilson 2008). Interweaving these principles through this indigenized process empowered community participants to connect and engage with the material on a deeper level and provide more in-depth and nuanced feedback that drew upon their own wisdom and lived experience. This indigenized approach enabled our evaluation and planning team to evolve evaluation questions and frameworks for community participant responses.

#### 2.2.1. Workgroups

We engaged 23 SAP participants that represent the following six sectors:

1. Philanthropic Funders Sector;
2. Research Sector;
3. Business Sector;
4. Policy Maker Sector;
5. Community-Based Organizations, Nonprofit Organizations, and Direct Service Providers Sector;
6. Policy Advocacy and Organizing Sector.

SAP participants were invited to participate in two workgroups held virtually on Zoom. The purpose of Workgroup 1 was to identify how the *Towards a Just and Equitable Central Coast* report data were being used in different sectors to help our team understand how diverse groups were engaging with the data and applying them to their equity work. Participants were organized into four small groups with participants outside of their respective sector and our evaluation and planning team took concurrent notes. The goal of these small groups was to have participants share strategies of how they use data to address inequities within their sectors, identify any differences and overlap between sectors, and share how their personal experiences impact the work they do. A total of 17 out of 23 participants attended this workgroup meeting, and all materials used were sent to the participants.

Workgroup 2 convened after the individual interviews and focused on sharing the preliminary findings of the interviews and presenting updated materials. In addition, participants were dispersed into the same four small groups to discuss the next steps for the CCREI, including what roles they would want to take on. The goal of this meeting was

to continue strengthening relationships between the six sectors and gain endorsement of the direction in which the SAP was headed. A total of 17 out of 23 participants attended.

### 2.2.2. Evaluation and Planning Surveys

A total of two surveys were administered via Google Forms. Survey 1 consists of 20 questions and was distributed after Workgroup 1 via email (Appendix A). The first 10 questions of Survey 1 aimed to identify current and prospective efforts to transform the report data into tangible outcomes and to identify which inequity crises participants want to address collaboratively. The second 10 questions of Survey 1 were adapted from the Community Readiness Model (CRM), which were included to identify participants' readiness to engage in cross-sector collaborative change (Plested et al. 2006). As we were unable to complete the 36-item individual interview administration of the validated CRM tool due to the limited capacity of the SAP participants, we utilized a CRM-informed approach to develop 10 items in Survey 1 (Appendix B). A CRM-informed approach provided the opportunity to assess participants' knowledge of the strengths and obstacles to cross-sector collaborative efforts, as well as to understand current leadership, training, and resources for cross-sector collaboration. Follow-up emails were sent to those who did not complete by the deadline. A total of 23 participants responded to the survey.

The second survey was distributed after Workgroup 2 with the intent to collect feedback on the SAP process and to plan the next steps of the CCREI. This includes participants sharing their honest experiences of the evaluation process and evaluating whether the tools that were presented will be used in their future work, with the aim of obtaining their endorsement and commitment to continue participating in the three-year SAP. A total of 11 out of the 23 participants responded to the second survey.

### 2.2.3. Individual Interviews

During Workgroup 1, we announced that individual interviews will be conducted, and scheduling was completed via email. Based on participants' feedback thus far in the SAP process, our evaluation and planning team shifted the interview questions to focus more on forming cross-sector collaborative partnerships, rather than finding specific inequity crises to address. The following questions were asked to each participant:

- *What norms do you need to feel safe in the initiative and collaborative relationships? What do trusting cross-sector relationships "look like"?*
- *How do we acknowledge power imbalance and privilege?*
- *What does a successful reciprocal collaboration look like to you? How do we successfully collaborate reciprocally, given power imbalance?*

A total of 22 out of the 23 participants participated in 30 min individual interviews in September 2022. Detailed, concurrent notes were taken during the interviews. Using those notes, thematic coding was conducted and organized into strengths and opportunities by our team.

### 2.2.4. Partnership for Excellence

To include a broader and more diverse community perspective in the SAP, The Fund for Santa Barbara and Evolve Equity Psychology, Inc. facilitated a community conversation through the Santa Barbara Foundation RoundTable 2023 Partnership for Excellence, and in partnership with the Nonprofit Resource Network. Studies have described successful community evaluation projects to be designed with and alongside community members and blend a variety of data collection methodologies including qualitative, quantitative, and visual (Fine and Torre 2019). Therefore, we engaged an additional 200 community members from the Central Coast region in the Partnership for Excellence Conference to discuss regional inequities and engage in reflective action by strategizing solutions.

The October 2022 community gathering included 200 participants from the nonprofit and philanthropic sectors. During the three-hour virtual program, attendees were introduced to the importance of data in community work and the philanthropic sector, which

included a presentation of the data and framework from the *Towards a Just and Equitable Central Coast* report and the action-organizing framework for the CCREL.

Attendees were asked to answer two Zoom polls that focused on the importance of cross-sector collaboration and how familiar they are with the report data. The goal of asking these questions was to see if what was discussed in the SAP process resonates with more community members in the nonprofit and philanthropic sectors. Then, attendees were dispersed into 19 breakout sessions to discuss how an equity lens shows up in their work and how to advance equity through data and learning. Breakout conversations were framed around the central question, “How might we activate equity in our organizations, constituencies and communities?” After the breakout sessions, participants returned to the large group for a general community wisdom-sharing session, in which they had the opportunity to verbally share key takeaways from their breakout session’s conversation, as well as add their written reflections to a shared Google JamBoard. Participants were encouraged to share:

- *Something you learned today;*
- *Something that inspired you;*
- *An action you’ll take;*
- *An equity resource to share.*

This facilitation method allowed for both top-down knowledge-sharing (through data presentations and panel discussion conversation) and bottom-up knowledge-sharing (through breakout groups for peer-to-peer sharing, learning, and self-reflection).

### 3. Results

#### 3.1. Community Consultations

The Community Consultation model set community partners as equal knowledge-producers, and provided a foundational community-led research framework for an integrated and intersectional *Towards a Just and Equitable Central Coast* report. Results from the Community Consultations, which were a collection of diverse narratives and community perspectives, set the direction of the research. Notably, this resulted in an expansion of data around COVID-19, particularly as they related to disparities among demographic lines, as well as a deeper exploration into regional racial disparities in the wake of George Floyd’s and Breonna Taylor’s murders. Results from the Community Consultations informed the tone and directionality of the report, as well as the resulting frameworks for social change and regional equity action.

Dynamic narratives shared during Community Consultations contributed significantly to the framing of the report and resulted in a higher degree of intersectionality. The Community Consultations underscored the urgency and intersectionality of equity issues, including issues such as racial injustice, the complexity of the region’s housing crisis, economic inequality, and health disparities. Community members shared insight into the complex and highly nuanced aspect of equity issues and allowed for a deeper investigation into the intersectionality of inequity in the US Census-based data analysis of equity indicators presented in the report (Hale et al. 2022).

It is important to stress that Community Consultations were not simply a prelude to data analysis—they are the model for an ongoing body of community-led research that builds regional capacity for inclusive and equitable planning, policy development, and political action. Deepening and diversifying our knowledge base in this way also enhances the capacity to build a shared understanding of the region’s problems and prospects, generate alliances across issue areas, and track progress towards equity and justice over time (Hale et al. 2022).

#### 3.2. Strategic Action Plan Process

The results stemming from each method of data collection showcase the changes made throughout the SAP process due to continuous participant engagement and feedback.

Our evaluation and planning team ensured that community voices shaped the evaluation questions and the focus areas to develop an accurate and comprehensive SAP.

### 3.2.1. Workgroup 1

SAP participants gathered virtually for the first-time during Workgroup 1, which focused on introducing the SAP approach, gathering information about existing ways in which participants had used the data from *Towards a Just and Equitable Central Coast* in their respective sectors, and opportunities participants saw to further leverage the data to inform actionable change. In the four small groups, common themes that arose were the need to acknowledge power imbalances and build trusting relationships to successfully engage in collaborative projects. In addition, several participants expressed their hesitations regarding the SAP process and questioned how the *Towards a Just and Equitable Central Coast* report data could be turned into action. Our evaluation and planning team initially planned for the first workgroup to focus on the implications of the data and how to address specific inequity crises. However, participants focused their discussions on establishing long-lasting relationships across sectors. Therefore, we had to adjust our approach to the SAP by shifting the focus from data implications to cross-sector collaborative change.

### 3.2.2. Survey 1

The first survey focused on participants' readiness to engage in cross-sector collaborative projects to address the inequities identified in the *Towards a Just and Equitable Central Coast* report.

For the first 10 survey questions, two evaluators assessed SAP participant's readiness level to address regional inequities. Results show that 91% of Workgroup participants were familiar with the inequities data findings, and 63% reported specific ways that they had used the report findings.

For questions 11–20, one evaluator scored the 10 CRM-informed items using the anchored rating scales for scoring each Dimension (Plested et al. 2006), with each CRM Dimension receiving a score ranging from 1 to 9 (Appendix B). Overall, the highest level of readiness was present in CRM Dimension of Leadership and Resources, with scores ranging from 3 to 6. CRM dimensions with the lowest readiness were Community Knowledge of Efforts and Community Climate, with scores ranging from 1 to 4. The results suggest that although there are leadership and resources for cross-sector collaborative efforts, the efforts are not focused, detailed, or well-known.

Our evaluation and planning team conducted a summative analysis of the survey findings and reached a consensus that SAP participants are in the pre-planning stage for the CCREI task of engaging in cross-sector collaboration to address inequities, meaning that there is clear recognition of a need for the CCREI; however, efforts are not focused or detailed (Plested et al. 2006). Understanding participants' readiness level to address regional inequities via cross-sector collaboration enabled us to gain a better understanding of general community readiness and develop the three-year SAP to be reflective of both existing community engagement in addressing inequities, and tangible goals for future action.

### 3.2.3. Individual Interviews

Stemming from the results of Workgroup 1 and Survey 1, we identified the need to ground participants in a way that would set the CCREI up for future success in cross-sector collaboration. By integrating the common themes that arose from the first workgroup and combining them with the readiness results from the first survey, the 4 Phases Model was drafted and integrated into the interview questions (Table 2). Incorporating these guiding principles enabled us to see if this was an appropriate model to use for the SAP. It is important to note that we changed all the initially planned interview questions to focus on these four phases due to participant feedback. A shift to focusing specifically on cross-sector collaboration was very important at this phase of data collection to ground

the group before establishing collaborative projects to work on. As a result of this shift, thematic coding was carried out based on the 4 Phases Model and organized into strengths and opportunities for data interpretation.

**Table 2.** 4 Phases Model.

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Phase 1: Building Trusting Cross-Sector Relationships
<ul style="list-style-type: none"> <li>• Psychological safety.</li> <li>• Communication agreements.</li> <li>• Healthy boundaries are needed to reduce an “us vs. them” mindset.</li> <li>• Invite new authentic connections and strengthen existing connections.</li> </ul>
Phase 2: Acknowledging Power and Privilege
<ul style="list-style-type: none"> <li>• Awareness and understanding.</li> <li>• Naming of structural power imbalance across sectors, institutions, social locations, lived experience, and roles.</li> </ul>
Phase 3: Successful Reciprocal Collaboration
<ul style="list-style-type: none"> <li>• Giving and receiving to build resource-sharing alliances.</li> <li>• Promote a “collective narrative”.</li> <li>• Catalyze grassroots alliances and organic organizing efforts.</li> </ul>
Phase 4: Sustainable Resource Circulation
<ul style="list-style-type: none"> <li>• Circulating resources (time, funding, people, roles, skills, space, data) reliably and consistently to produce replicable data-driven actions that achieve measurable results.</li> </ul>

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For Phase 1, our evaluation and planning team asked participants about trusting cross-sector relationships and they shared various strengths that are already used or needed to create safety and form connections. The main takeaway is the need to establish collective norms/agreements. Most participants shared the importance of honoring each other’s presence and the experience they bring to the space. This expands beyond people’s job titles or the organization they represent, but also their life experiences, background, and individual skills. Therefore, role clarification and understanding are needed in the collective space to build trust. On the other hand, most participants explained that creating a trusting relationship takes time and how often, in this type of work, the outcomes are the priority, over the formation of authentic, long-term relationships. With this normalization, there is a hesitation to believe that the environment will be safe enough to raise legitimate fears, have real discussions, and be heard.

*“Essential to collaboration—how do we make decisions, resolve conflict, how do some of us step back or forward, share leadership, define success.”* (Participant from Community-Based Organizations, Nonprofit Organizations, and Direct Service Providers Sector)

Several participants questioned what their role is and what “hat” they would be wearing (i.e., sector leader, community member, organization representative, individual), as well as how others would perceive them and their input. Lastly, participants expressed that their voices do not represent an entire sector or community, and that it is not their responsibility to represent an entire sector. Nevertheless, some participants shared their nervousness regarding others’ levels of commitment.

For Phase 2, evaluators asked participants how they feel about power and privilege and participants expressed the need for it to be acknowledged, recognized, and understood, as well as an understanding that those steps alone will not instantly resolve the existing imbalance. Participants emphasized the importance of everyone both having a voice and being heard, as well as the importance of educating oneself on history and being open to continuous learning. For example, one participant shared the need for:

*“Diverse experience, real time learning.”*

(Participant from Community-Based Organizations, Nonprofit Organizations, and Direct Service Providers Sector)



Participants opened up about both the internal and external struggles they see within sectors, and how each sector has its own nuances and unique experiences. Status and organizational hierarchies were also raised as a concern and participants emphasized the importance of ensuring that all people in the collaborative space are at the same level and that no-one is prioritized over others. Participants said that there needs to be space to have hard conversations, but this can be tricky because it takes time to learn and understand, thus reiterating the need for continuous learning. An important concern was raised surrounding how openly people can speak in the space due to the fear of retaliation from others due to the power imbalance.

*“There may be a perceived power imbalance there that makes them feel like they can’t say something that might upset the decision-making person.”* (Participant from Community-Based Organizations, Nonprofit Organizations, and Direct Service Providers Sector)

For Phase 3, our evaluation and planning team asked what successful collaborative projects look like, and participants shared how genuine reciprocity is needed to address equity issues and, while in these settings, participants need to feel that their presence and expertise is valued in the space.

*“Everyone recognizes how valuable everyone in the team is, and everyone has different strengths to contribute.”* (Participant from Research Sector)

*“Successful reciprocal collaboration requires a genuine regard—not just those who receive the benefits/receive the services—not just the recipients who are appreciative of what they are receiving; the agency/org providing that service is appreciative of how the service benefits them as well as the recipients.”* (Participant from Community-Based Organizations, Nonprofit Organizations, and Direct Service Providers Sector)

Participants emphasized how these collaborations are a shared responsibility and commitment, which includes collective decision-making, accountability, leadership, and a commitment to reach the goals together. This builds on participants expressing the importance of setting clear expectations for the project and those involved in the process. In addition, several participants expressed that collaborating is a shared learning experience, and that it should be positively transformative for all who are involved in the work. An important strength highlighted by participants is setting time to celebrate small and big wins, reflect on successes, encourage each other, and bring joyfulness into the work.

*“Lifting up and celebrating all the different ways that people contribute, and really holding those values.”* (Participant from Philanthropic Funders Sector)

Building from the opportunities mentioned in Phase 2, participants raised concerns regarding possible power imbalances that may occur in collaborative spaces and questioned how their work and voice would be appreciated, valued, and meaningful to others.

*“Not create a hierarchy of priorities—a consensus involved even though there won’t be total agreement.”* (Participant from Research Sector)

Lastly, participants shared that reciprocity looks like mutual loss/sacrifice and holding each other accountable.

For Phase 4, the evaluators did not explicitly ask about sustainable resource circulation because this was going to be the focus of Workgroup 2; however, statements were coded into Phase 4 if applicable. As mentioned in every Phase, participants emphasized that this work takes time, but it is crucial to set measurable outcomes. However, barriers surrounding sustainability, including funding, capacity, and commitment make it difficult to see positive impacts.

*“We all want the best for our community, it will be complex and more work, will take longer and take more patience.”* (Participant from Policy Maker Sector)

*“I think that in order to make this work, we need capacity—and capacity doesn’t mean just commitment—it means the infrastructure, the tools, the people and staff.”* (Participant from Research Sector)

Some participants mentioned the need to understand the data and the story they tell. Almost all participants shared, in some way, that action on the report is needed; however, it is not yet clear what that looks like.

*“Have to understand data, narrative, and story.”* (Participant from Philanthropic Funders Sector)

*“Study done, findings there, now what do we want to see in the next two years, three years and put these things clearly to avoid being too ambitious about this stuff? Sometimes things go forward and then backward and then we don’t know where they are.”* (Participant from Research Sector)

#### 3.2.4. Workgroup 2

Our evaluation and planning team presented the preliminary findings from the interviews in combination with the readiness results. Participants also established group norms to create safety and trust within the SAP process and beyond. Then participants were dispersed into small groups and were asked questions relating to their future role and contributions to the CCREI. Participants emphasized the importance of continuing to reinforce belonging and recognize that collaboration includes learning from one another. In addition, participants identified how they would like to contribute to the CCREI, such as assisting with funding opportunities, hosting a cross-sectoral convening, and sharing report findings in an academic setting through lectures and presentations. By identifying contributions, participants also established the roles they would like to have, including providing technical assistance and research support, resource-sharing, and hosting meeting spaces. Roles were not set in stone, but used to brainstorm potential ideas of what each sector will be contributing to and possibly collaborating on.

#### 3.2.5. Survey 2

When participants were asked about how satisfied they were with the overall SAP process on a scale from 1 (not very satisfied) to 5 (very much satisfied), 55% of participants selected very much satisfied, 27% selected satisfied, and 18% selected neutral. When participants were asked how beneficial they think the SAP will be for the work that they are doing on a scale from 1 (not very beneficial) to 5 (very much beneficial), 46% of participants selected very much beneficial, 36% selected beneficial, and 18% selected neutral. When asked how likely it was that they would incorporate each of the four phases into their work, all respondents were somewhat likely to, very likely to or already incorporate all four phases into their work. Participants also shared key takeaways from the SAP, including feelings of excitement, interest, and readiness for cross-sector equity work and how this community-led process was a good starting point for collective change.

#### 3.2.6. Partnership for Excellence

During the Partnership for Excellence, two Zoom polls were launched. When asked about how important cross-sector collaboration is for promoting equity, 100% of attendees said it was important; however, when asked how knowledgeable they were about cross-sector collaboration, 35% of attendees said they were not very knowledgeable or uncertain. When asked about the level of expertise and training among those working on cross-sector collaborative efforts, 67% of attendees stated that the level was moderate. In addition, when asked about how familiar attendees were with the data and research findings of the *Towards a Just and Equitable Central Coast* report, 67% of them were familiar with the data while the remainder were not familiar.

For the Google Jamboard session, attendees responded to four questions after engaging in the program content and their community group discussions in Zoom breakout groups.

When participants were asked to share something they learned, they highlighted how the Community Readiness Model is a useful framework for addressing internal organizational resistance for addressing equity, indicating an interest in using and applying the model in the nonprofit sector. In addition, participants felt inspired when engaging in conversations with new community members, learning about how others are specifically using the report data in their respective nonprofit organizations, and understanding how current collaborative projects are successful. Participants also shared an action they will take to promote equity, with the following common themes: intentions to collaborate on a deeper level within and outside of their organization; sharing back program information with their staff, volunteers, and key partners; creating plans and timelines based on the 4 Phases Model and Community Readiness Model; shifting grantmaking priorities in philanthropic organizations. For the last Jamboard question, participants shared equity resources such as existing collaborative groups, county- and state-level equity resources, capacity-building training opportunities, and funding opportunities.

### 3.2.7. Three-Year Strategic Action Plan

The three-year SAP resulted from a community-led evaluation and planning process that promoted community engagement and reflective action toward regional equity advocacy and change. Although the three-year plan is not described in this article, only the process of its creation, it is important to understand how community participants led the process and formulated the strategies to actionize the report's data. By centering the community at the beginning of the evaluation process, community members can continue to be the center of the CCREI and the center of strategies for equity solutions. This process of experiential education empowers community learning and equips the community with foundational tools to continue equity work both in their respective sectors and in more effective cross-sector collaboratives.

## 4. Discussion

When considering approaches to transform the Central Coast to a more just and equitable region, it is crucial to center community voices, experience, and wisdom in unified regional action. The principles of participatory evaluation include the intentional engagement of community partners throughout the evaluation and planning process, from problem definition through data collection and analysis, to using findings to effect change, must also inform and support collective strategies for action-organizing at an intersectional regional level (Cacari-Stone et al. 2014). The priorities and topics identified by community participants during the Community Consultations provided a framework for the structure of the equity data analysis in the *Towards a Just and Equitable Central Coast* report and contributed to a collective understanding of the breadth of inequities experienced in the Central Coast. These community perspectives supported the intersectionality of the research, and the report directly speaks to the struggles and realities of the equity issues faced by Central Coast communities, providing a strong foundation for engaged equity action research.

Developing a community-led equity framework requires flexibility and a willingness to adapt throughout the evaluation and planning process, including the consistent integration of participant perspectives and feedback, as well as the ability to adjust the research focus and questions accordingly. This ultimately contributes to not only a deeper understanding of the questions, but to a body of work that is more holistic and reflective of the nuances of intersectional collective community problem-solving for ingrained and large-scale equity issues. This was demonstrated after Workgroup 1 during the SAP evaluation and planning process, as we reframed evaluation questions based on participant hesitations and feedback. This flexibility enabled our evaluation and planning team to adjust our strategy (which originally centered on data implications from the report) to center on developing frameworks for relationship-building, thus shifting the focus from strength-based approaches to cross-sector collaborative change. Centering our community

not only as equal knowledge-producers, but as equal solution partners, can begin to heal community trauma, particularly that experienced by community organizers at the forefront of social movements, resulting from previous action-planning efforts that either failed to center the voices of those most impacted or did not result in tangible change.

We found that the key to starting and sustaining this work is building trusting cross-sector collaborative relationships that honestly acknowledge power and privilege, which leads to opportunities for reciprocal collaboration and an initiative that can be sustained in the long-term. This is similar to previous literature results stating that cross-sector collaborative frameworks express that trusting relationships are the essence of collaboration (Lee et al. 2012). Although collaborations often start with different degrees of trust, trust-building is an ongoing requirement for collaborative success (Bryson et al. 2015). Our findings from the SAP process, including reframing our evaluation approach to focus on cross-sector collaboration based on specific feedback from participants during Workgroup 1 discussions, Individual Interviews, and Survey 1, reflect community learnings centered around an appreciation of diversity of experience, both personal and professional responsibilities, and a desire for change rooted in addressing structural inequities. When looking at community-led solutions to equity issues, which are longstanding and deeply ingrained in the social, political, and economic landscape of the Central Coast, it is equally important to recognize that the relationships upon which current and ongoing strategies are built are also reflective of the social, political, and economic fabric of life in the Central Coast.

This work is highly personal (Lee et al. 2012)—in other words, success is reflective of relationships built among individuals, which, in turn, lead to trust among organizations, local governments, research centers, and other public institutions that contribute to the richly complex social fabric of modern societies. Relationship-based collaborations are affected by hierarchies—either those directly embedded in hierarchical structures or those affected by such structures (Bryson et al. 2015). Honest acknowledgements of existing power imbalances and privileges, and a genuine willingness to reassess allocations of such power and privilege, are necessary for collaborative action. This was particularly shown during Individual Interviews, as participants spoke regarding how power influences conflict resolution and shared leadership, as well as power's influence on the valuation of experience. Making a genuine effort to reassess power not only builds and deepens trusting relationships but leads to the reciprocal relationships necessary for collaboration. Participants elevated this in their individual interviews, specifically when speaking to genuine reciprocity, which honors the mutual benefit of services for both the giver and the recipient. This reciprocity is needed to encourage collaborative partners to contribute their resources (e.g., knowledge, time, experience, financial assets, power networks, organizing capacities) to the collective agenda. When trusting cross-sector relationships of reciprocity are successfully built and caringly maintained, a sustainable initiative arises, and equity solutions emerge. The results from Workgroup 2 and Survey 2 highlight a commitment to continuing to build cross-sector relationships, as well as a willingness to integrate frameworks for equity action into participants' respective organizations, sectors, and collaborative work. Our evaluation process expands upon not only building relationships among community members but building relationships among organizations across sectors and counties. We hope this can serve as an example framework for effective equity action on larger state, national, and international levels.

Community-led evaluation and Indigenous approaches should be the standard for developing equity frameworks. The CCREI's evaluation and planning process, including Community Consultations, community engagement and education opportunities, and the Strategic Action Plan, sets foundations for equity action-organizing that is both scientifically rigorous and community-led, and serves as a record of an intentional community-led evaluation effort. By engaging different community perspectives and experiences from three counties and six sectors, the evaluation scope actively sought out not only different community perspectives and experiences, but also different levels of access to power, privilege, resources, and networks. A community-led, Indigenous approach to address-

ing complex community inequities will co-create—along with the commitment to public investment, policy change, and social movement organizing—solutions to long-standing inequities and the structural practices that uphold and perpetuate further community harm. Research must honor a shared fate through co-creating community landscapes that are environmentally, economically, and politically interconnected, and support the equitable distribution of power and resources to empower communities to participate in decision-making that affects them. We encourage others to adapt their research and evaluation processes to follow systematic community knowledge-base-building that values community wisdom, identifies power imbalance, promotes trust-building through healthy discomfort, and encourages reflective action.

## 5. Conclusions

In the context of existing research structures, our presented evaluation and planning process lands somewhere between findings and action and helps inform collective and unified equity-centered research and action-organizing. However, a more expansive view illuminates the evaluation and planning process as not a separate or static contribution to equity work, but rather the equity action-organizing work itself. In addition, community contributions to research and evaluation need to be initiated, valued, and shared in detail as standards of research practice. Community-led approaches to equity work contribute to tangible outcomes. As community members deeply experience the manifestation of inequities, their active engagement and leadership drives solutions that are ultimately much richer and much more successful at shifting long-standing structural inequities. This is demonstrated through our work in California’s Central Coast and can be a framework for other communities addressing systemic equity issues both nationally and internationally.

Through the Community Consultations and the Strategic Action Planning process, there is a recognition that the intersectionality and interconnectedness of regional inequities means that the solutions to such equity issues must be intersectional and interconnected across issue areas and sectors. The CCREI integrates these principles into the foundations of equity-centered community action organizing that will serve our Central Coast community long into the future. Our community-led equity framework not only offers strategies for one to three years down the road, or even thirty years, but “seven generations” into the future. We recognize that while we will not see the full realization of what this work aims to achieve, nor will we witness a complete transition to a just and equitable future in the Central Coast, what we can offer to future generations is a contribution to shifting research frameworks to serve communities more equitably in our collective struggle and aspirations for a truly sustainable, resilient, and justice-centered equitable future.

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**Informed Consent Statement:** When participants were invited to engage in the evaluation and planning process, informed consent was obtained.

**Data Availability Statement:** The following datasets are all publicly accessible via the following Reports available on the Central Coast Regional Equity Initiative website, <https://centralcoastequity.org/>, (accessed on 8 July 2023): *Towards a Just and Equitable Central Coast* report (<https://centralcoastequity.org/regional-equity-study/>, (accessed on 8 July 2023)); Community Consultations Report (<https://centralcoastequity.org/community-consultations/>, (accessed on 8 July 2023)); and Partnership for Excellence Google Jamboard, Partnership for Excellence Strategic Action Planning Report of Recommendations, Strategic Action Planning Workgroup Report, Partnership for Excellence Google Jamboard, Partnership for Excellence Data Visuals available all at (<https://centralcoastequity.org/strategic-action-plan/>, (accessed on 8 July 2023)).

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## Appendix A. Survey 1 Questions

The purpose of this survey is to identify cross-sector collaborative change opportunities. Estimated time of completion is 25 min.

1. Please select the sector(s) that you represent. Select all that apply.
  - a. Policy Maker
  - b. Research Sector
  - c. Community-Based Orgs, Non-profits, Direct Service Providers
  - d. Business
  - e. Policy Advocacy and Organizing
  - f. Philanthropic Funders
2. Do you have any comments, questions, or feedback about Workgroup #1?
3. Which inequality crisis is your sector (or sectors) most concerned with: (check all that apply)
  - a. Environmental exposures
  - b. Access to healthcare
  - c. Education
  - d. Housing
  - e. Wages and employment
  - f. Criminal justice
4. Which inequality crisis are you actively working on? (check all that apply)
  - a. Environmental exposures
  - b. Access to healthcare
  - c. Education
  - d. Housing
  - e. Wages and employment
  - f. Criminal justice
5. What data and research findings from the Central Coast Regional Equity Study ("Study") have you used?
6. On what project(s) have you used the findings of the Study?

7. How have you used the findings (data & research findings) of the Study?
8. How might you use the findings of the Study in the future?
9. How familiar would you say you are, with the data and research findings of the Study?
  - a. Very familiar
  - b. Somewhat familiar
  - c. Not very familiar
  - d. Uncertain
10. What developments can be made to improve the accessibility and utility of the CCREI Website? In your sector(s)...
11. How important is cross-sector collaboration?
  - a. Extremely Important
  - b. Somewhat Important
  - c. Not Very Important
  - d. Unsure
12. Please describe current cross-sector collaborative efforts.
13. What are the strengths of these cross-sector collaborative efforts?
14. Who are the leaders for cross-sector collaboration?
15. How are leaders currently involved in cross-sector collaborative efforts? Please explain. (For example: Are they involved in a committee, task force, etc.? How often do they meet?)
16. What are the primary obstacles to cross-sector collaborative efforts?
17. How knowledgeable are others about cross-sector collaboration?
  - a. Extremely knowledgeable
  - b. Somewhat knowledgeable
  - c. Not very knowledgeable
  - d. Uncertain
18. How would you rate the level of expertise and training among those working on cross-sector collaborative efforts?
  - a. Very high
  - b. Moderate
  - c. Low
  - d. Very Low
19. How are current efforts for cross-sector change and collaboration funded? Please explain.
20. Are you aware of any proposals or action plans that have been submitted for funding that address cross-sector change and collaboration in your sector?
  - a. Yes! (please explain in the text field). in the next question.
  - b. Not at this time
  - c. Uncertain

## Appendix B. Community Readiness Model-Informed Survey

The Community Readiness Model (CRM) informed the development of Survey 1 questions. 10 modified CRM questions were used in Survey 1 to evaluate readiness for cross-sector collaboration. Ten questions were selected from the 36-item CRA to adapt for the online questionnaire format. The ten questions pertain to the 6 dimensions of the CRA. More specifically, 2 out of 11 questions from Dimension A; 1 out of 4 questions from Dimension B; 2 out of 4 questions from Dimension C; 1 out of 5 questions from Dimension D; 1 out of 4 questions from Dimension E; 3 out of 8 questions from Dimension F. Selected questions from the CRA were chosen based on the need and assuring quality responses since it was distributed in a survey versus an interview format. Modifications were made to the original CRA items to better fit the population being surveyed. Specifically, “cross-sector

change and collaboration” was used instead of “issue”, and “sector” was used instead of “community.”

Table A1 outlines each CRA Dimension, the original CRA question wording, and the question adaptations made for Survey 1. Table A2 outlines the scores for the nine CRA stages of readiness.

**Table A1.** CRA Survey Adaptation by CRA Dimension.

CRA Dimension	Community Readiness Assessment	Survey 1 Adaptation “In your sector(s)…”
A: Community Efforts	Using a scale from 1–10, how much of a concern is this issue in your community (with 1 being “not at all” and 10 being “a very great concern”)? Please explain.	How important is cross-sector collaboration? Extremely Important Somewhat Important Not Very Important Unsure
A: Community Efforts	Please describe the efforts that are available in your community to address this issue.	Please describe current cross-sector collaborative efforts.
B: Community Knowledge of Efforts	What are the strengths of these efforts?	What are the strengths of these cross-sector collaborative efforts?
C: Leadership	Who are the “leaders” specific to this issue in your community?	Who are the leaders for cross-sector collaboration?
C: Leadership	How are these leaders involved in efforts regarding this issue? Please explain. (For example: Are they involved in a committee, task force, etc.? How often do they meet?)	How are leaders currently involved in cross-sector collaborative efforts? Please explain. (For example: Are they involved in a committee, task force, etc.? How often do they meet?)
D: Community Climate	What are the primary obstacles to efforts addressing this issue in your community?	What are the primary obstacles to cross-sector collaborative efforts?
E: Community Knowledge about the Issue	How knowledgeable are community members about this issue?	How knowledgeable are others about cross-sector collaboration? Extremely knowledgeable Somewhat knowledgeable Not very knowledgeable Uncertain
F: Resources Related to the Issue	On a scale from 1 to 10, what is the level of expertise and training among those working on this issue (with 1 being “very low” and 10 being “very high”)?	How would you rate the level of expertise and training among those working on cross-sector collaborative efforts? Very high Moderate Low Very Low
F: Resources Related to the Issue	How are current efforts funded? Please explain.	How are current efforts for cross-sector change and collaboration funded? Please explain.
F: Resources Related to the Issue	Are you aware of any proposals or action plans that have been submitted for funding that address this issue in your community? If yes, please explain.	Are you aware of any proposals or action plans that have been submitted for funding that address cross-sector change and collaboration in your sector? Yes! (please explain) Not at this time Uncertain



**Table A2.** Nine Stages of CRA Readiness.

Score	Readiness Stage
1	No Awareness
2	Denial/ Resistance
3	Vague Awareness
4	Preplanning
5	Preparation
6	Initiation
7	Stabilization
8	Confirmation /Expansion
9	High Level of Community Ownership

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