# Progress on Implementation of the Recommendations of the Equitable Data Working Group

*A Report by the*

Subcommittee on Equitable Data

*of the*

NATIONAL SCIENCE AND TECHNOLOGY COUNCIL

March 2023

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## About the NSTC Subcommittee on Equitable Data

The Subcommittee on Equitable Data (SED) was chartered to operationalize and institutionalize the work of the Equitable Data Working Group (EDWG) established by the Executive Order on Advancing Racial Equity and Support of Underserved Communities Through the Federal Government (EO 13985). The SED provides executive departments and agencies a forum for implementing the EDWG recommendations to achieve its vision for equitable data. Equitable data allow for rigorous assessment of the extent to which government programs and policies yield consistently fair, just, and impartial treatment of all individuals. Equitable data illuminate opportunities for targeted actions that will result in demonstrably improved outcomes for underserved communities.

## About this Document

This SED progress report provides an illustrative look at federal agency progress on implementing the five high-level recommendations of the EDWG since January 20, 2021. It describes patterns of EDWG recommendation adoption across agencies, relevant feedback from public stakeholders, and current and future efforts to advance government-wide progress in implementing the President's mandate to use data to yield more equitable outcomes for the American people.

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    Community

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## Abbreviations and Acronyms

| | |
|---|---|
| **AA** | Asian American |
| **AI/AN** | American Indian/Alaska Native |
| **ARP** | American Rescue Plan |
| **BIL** | Bipartisan Infrastructure Law |
| **BJS** | Bureau of Justice Statistics |
| **CBSA** | core-based statistical area |
| **CDC** | Center for Disease Control and Prevention |
| **CDO Council** | Federal Chief Data Officer Council |
| **CFAP** | Coronavirus Food Assistance Program |
| **CoP** | community of practice |
| **DEIA** | diversity, equity, inclusion, and accessibility |
| **DHS** | Department of Homeland Security |
| **DOE** | Department of Energy |
| **DOI** | Department of the Interior |
| **DOJ** | Department of Justice |
| **DOL** | Department of Labor |
| **DOT** | Department of Transportation |
| **DSWG** | data-sharing working group |
| **ECHO Notify** | Enforcement and Compliance History Online notification system |
| **ED CoP** | Equitable Data Community of Practice |
| **EDP** | Enterprise Data Platform |
| **EDWG** | Equitable Data Working Group |
| **EDWG Vision for Equitable Data** | A Vision for Equitable Data: Recommendations from the Equitable Data Working Group |
| **EFF IWG** | Equitable Federal Funding Interagency Working Group |
| **EO 14031** | Executive Order on Advancing Equity, Justice, and Opportunity for Asian Americans, Native Hawaiians, and Pacific Islanders |
| **EO 13985** | Executive Order on Advancing Racial Equity and Support of Underserved Communities Through the Federal Government |

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| **EO 14035** | Executive Order on Diversity, Equity, Inclusion, and Accessibility in the Federal Workforce |
| **EO 14052** | Executive Order on Implementation of the Infrastructure Investment and Jobs Act |
| **EO 14074** | Executive Order on Advancing Effective, Accountable Policing and Criminal Justice Practices to Enhance Public Trust and Public Safety |
| **EO 14075** | Executive Order on Advancing Equality for Lesbian, Gay, Bisexual, Transgender, Queer, and Intersex Individuals |
| **EO 14082** | Executive Order on the Implementation of the Energy and Infrastructure Provisions of the Inflation Reduction Act of 2022 |
| **EO 14091** | Executive Order on Further Advancing Racial Equity and Support for Underserved Communities Through the Federal Government |
| **EPA** | Environmental Protection Agency |
| **Evidence Act** | The Foundations for Evidence-Based Policymaking Act of 2018 |
| **FEMA** | Federal Emergency Management Agency |
| **FSA** | Farm Service Agency |
| **GSA** | General Services Administration |
| **HBCUs** | Historically Black colleges and universities |
| **HHS** | Department of Health and Human Services |
| **HUD** | Department of Housing and Urban Development |
| **ICSP** | Interagency Council on Statistical Policy |
| **IRA** | Inflation Reduction Act |
| **IWG** | interagency working group |
| **LGBTQI+** | lesbian, gay, bisexual, transgender, queer, and intersex |
| **LGBTQI+ Equity Agenda** | Evidence Agenda on LGBTQI+ Equity |
| **MSIs** | minority-serving institutions |
| **NASA** | National Aeronautics and Space Administration |
| **NCES** | National Center for Education Statistics |
| **NCHS** | National Center for Health Statistics |
| **NCVS** | National Crime Victimization Survey |
| **NHPI** | Native Hawaiian and Pacific Islander |

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|---|---|
| **NOAA** | National Oceanic and Atmospheric Administration |
| **NSF** | National Science Foundation |
| **NSTC** | National Science and Technology Council |
| **OMB** | Office of Management and Budget |
| **OSTP** | Office of Science and Technology Policy |
| **PET** | privacy enhancing technology |
| **PII** | personally identifiable information |
| **PTSD** | post-traumatic stress disorder |
| **RFI** | request for information |
| **SAM** | System for Award Management |
| **SBA** | Small Business Administration |
| **SBIR** | Small Business Innovation Research |
| **SBTT** | Small Business Technology Transfer |
| **SED** | Subcommittee on Equitable Data |
| **SME** | subject matter expert |
| **SOGI** | sexual orientation and gender identity |
| **SPD 15** | Statistical Policy Directive No. 15: Standards for Maintaining, Collecting, and Presenting Federal Data on Race and Ethnicity |
| **STEM** | science, technology, engineering, and mathematics |
| **TRI** | Toxics Release Inventory |
| **UI** | unemployment insurance |
| **USDA** | Department of Agriculture |
| **VA** | Department of Veterans Affairs |
| **WHIAANHPI** | White House Initiative on Asian Americans, Native Hawaiians, and Pacific Islanders |

## Executive Summary

On his first day in office, President Biden signed the [Executive Order on Advancing Racial Equity and Support for Underserved Communities Through the Federal Government](#) (EO 13985), which stated that "a first step to promoting equity in Government action is to gather the data necessary to inform that effort." This executive order tasked the Equitable Data Working Group to ensure that federal data can help advance equity. In April 2022, this group published [A Vision for Equitable Data: Recommendations from the Equitable Data Working Group (EDWG)](#), which included recommendations for how to advance equitable data across the federal government. This report highlights the significant work underway in agencies to implement these recommendations.

The principle of equitable data is about disaggregating and analyzing data to identify disparities in federal policies and programs, using levers of the federal government to address those disparities, and then enabling members of the public to hold government accountable. The Office of Science and Technology Policy's National Science and Technology Council Subcommittee on Equitable Data (SED) was established[1] to operationalize and scale best practices for realizing this core goal. More specifically, the SED collaborates with agencies to ensure that the federal government is making demonstrable progress toward achieving the recommendations called for in *A Vision for Equitable Data*.

This report documents a cross-section of select agency progress since Day One of the Biden-Harris Administration to implement equitable data practices. While it is clear from the work represented in this document that we have made significant progress on equitable data in a relatively short time, there is still more work to do. The final section of this report provides a brief description of the ways the SED intends to build on a strong foundation to accelerate progress over the coming months and years.

Key action items highlighted in each section of the report include work focused on the following:

### Making disaggregated data the norm while protecting privacy

➤ The Office of Management and Budget (OMB) has made considerable progress in its ongoing work to [revise the minimum race and ethnicity standards](#) used by federal agencies.
➤ OMB released [best practices](#) on the collection of sexual orientation and gender identity data in federal surveys.
➤ The SED published an [evidence agenda](#) that provides a roadmap for federal agencies to build evidence to advance equity for the LGBTQI+ community.
➤ ***What's Next:*** The SED will continue to develop data policy strategies for advancing the available evidence about historically underserved communities, such as detailed racial and ethnic groups, people with disabilities, and people in rural communities.

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[1] See Section 9 of the Executive Order on Further Advancing Racial Equity and Support for Underserved Communities Through the Federal Government [https://www.whitehouse.gov/briefing-room/presidential-actions/2023/02/16/executive-order-on-further-advancing-racial-equity-and-support-for-underserved-communities-through-the-federal-government/](https://www.whitehouse.gov/briefing-room/presidential-actions/2023/02/16/executive-order-on-further-advancing-racial-equity-and-support-for-underserved-communities-through-the-federal-government/).

## Catalyzing existing federal infrastructure to leverage underused data

➢ The Interagency Council on Statistical Policy curated a collection of survey data that allows for analyzing disaggregated data for Asian American, Native Hawaiian, and Pacific Islander (AA and NHPI) communities.

➢ Agencies such as the Department of Agriculture (USDA) and Department of Energy (DOE) have created equity-focused dashboards to help visualize program investments, so they can correct for gaps in service delivery.

➢ Agencies like the Department of State have created diversity, equity, inclusion, and accessibility (DEIA) dashboards to help shift recruitment and outreach efforts to ensure that they are able to deliver on their commitment to diversify their staff.

➢ *What's Next:* Agencies are making it easier for decisionmakers to find data to support an equitable data approach through practices such as curating data inventories and catalogs. One next step is to scale these practices across the federal government, for example, by infusing equitable data applications into agency implementation of data inventories in compliance with the Foundations for Evidence-Based Policymaking Act of 2018 (Evidence Act).

➢ *What's Next:* To generate disaggregated estimates of program participation by using data that other agencies have already collected, teams in government are creating better data linkage protocols, including development of standard language that agencies can use in data sharing agreements. These protocols will make it easier to generate new equitable data insights that can be used to advance equity.

## Building federal capacity to conduct robust equity assessments

➢ Agencies are hiring new data practitioners, upskilling existing staff on data science skills, and cultivating communities of practice so that staff working on equitable data issues can share expertise and tools.

➢ The SED launched the Equitable Data Community of Practice (CoP), designed to accelerate the adoption of effective equitable data practices across federal agencies.

➢ *What's Next:* Agencies are integrating instructional modules about how to conduct equity assessments to identify disparities into upskilling activities, and sharing across agencies, which could have a large-scale, ongoing impact deep within agencies.

➢ *What's Next:* Agencies are exploring how they might combine efforts to recruit a diverse data workforce, such as using subject matter experts to assess qualifications, coordinating recruitment from minority-serving institutions, and expanding pools of potential applicants to better include underrepresented communities.[2]

## Galvanizing diverse partnerships across levels of government, the research community, and the American people

➢ The SED's Interagency Working Group on Community Engagement and Accountability has been collecting agency experiences, promising practices, and tools for launching partnerships or collaborations with members of the public.

➢ Agencies such as the Department of Labor (DOL), the Federal Emergency Management Agency (FEMA), and the Centers for Disease Control and Prevention (CDC) have established data

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[2] https://chcoc.gov/content/guidance-release-eo-13932-modernizing-and-reforming-assessment-and-hiring-federal-job

partnerships with states to improve service delivery on urgent and expansive priorities like improving unemployment insurance (UI) and providing supports for pandemic response.

➢ **What's Next:** Infusing equitable data into the next versions of agency documents such as their equity action plans, learning agendas, capacity assessments, annual evaluation plans, evaluation policies, and data strategies will help build a culture and an internal mandate for engagement and accountability.

## Being accountable to the American people

➢ Teams such as the White House Infrastructure Implementation Team are increasing transparency in government decision-making by publishing data on the location and attributes of Bipartisan Infrastructure Law (BIL) projects.

➢ Agencies like the Environmental Protection Agency (EPA) and the Bureau of Justice Statistics (BJS) within the Department of Justice (DOJ) have created tools to ensure that data on topics like our environment and the criminal justice system are both available and accessible to the American people.

➢ **What's Next:** Agencies are continuing work to make it easier for the public to access and use data tools to further equitable data goals by building new data tools, dashboards, and access platforms.

# Introduction

*"A first step to promoting equity in Government action is to gather the data necessary to inform that effort."*

*President Joseph R. Biden, January 20, 2021*

With his Day One [Executive Order on Advancing Racial Equity and Support for Underserved Communities Through the Federal Government](#) (EO 13985), President Biden launched a whole-of-government effort to gather and use data to deliver more equitable outcomes to the American people. He ordered the formation of a new Equitable Data Working Group (EDWG) to

- study existing federal data collection policies, programs, and capabilities and
- provide recommendations that lay out a strategy for increasing data available for measuring equity and representing the diversity of the American people.

In April 2022, the EDWG released [A Vision for Equitable Data: Recommendations from the Equitable Data Working Group](#) where they defined **equitable data** as "those that allow for rigorous assessment of the extent to which government programs and policies yield consistently fair, just, and impartial treatment of all individuals." They added that **equitable data** "illuminate opportunities for targeted actions that will result in demonstrably improved outcomes for underserved communities." At its core, the principle of equitable data is about disaggregating and analyzing data to identify disparities in federal policies and programs, using levers of the federal government to address those disparities, and then enabling members of the public to hold government accountable.

> At its core, the principle of **equitable data** is about disaggregating and analyzing data to identify disparities in federal policies and programs, using levers of the federal government to address those disparities, and then enabling members of the public to hold government accountable.

The report's five high-level recommendations to advance equitable data include the following:

(1) Make disaggregated data the norm while protecting privacy.
(2) Catalyze existing federal infrastructure to leverage use underused data.
(3) Build federal capacity to conduct robust equity assessments in order to understand the impact of federal policies on equity outcomes.
(4) Galvanize diverse partnerships across levels of government and the research community.
(5) Be accountable to the American public.

Progress in implementing these recommendations naturally varies by agency mission and the nature of the data they collect or disseminate. Some agencies collect data primarily to guide policy and implement programs, while for others, producing federal statistics is their core statutory mission. Even so, each agency has a role to play in cultivating the collection and use of actionable data to advance equitable outcomes for all Americans. As recommended in the April 2022 EDWG report, this whole-of-government approach is aligned with related federal equity efforts, including the work of the [Gender Policy Council](#), the [White House Initiative on Asian Americans, Native Hawaiians, and Pacific Islanders](#) ([WHIAANHPI](#)), and the [Justice40](#) initiative. It is also executed in accordance with the President's policies on [scientific integrity and evidence-based policymaking](#), and related [OSTP](#) and [OMB](#) guidance.

Organized to reflect the five high-level recommendations in the EDWG Vision for Equitable Data, this progress report provides an illustrative look at progress since January 20, 2021. In this document, the Subcommittee on Equitable Data describes the patterns of EDWG recommendation adoption across federal agencies, relevant feedback from public stakeholders, and current and future efforts to advance government-wide progress in implementing the President's mandate to use data to yield more equitable outcomes for the American people.

## Subcommittee on Equitable Data

The Subcommittee on Equitable Data (SED) serves as the coordinating body for accelerating and tracking agency progress in implementing the recommendations of the EDWG, established by the [Executive Order on Advancing Racial Equity and Support of Underserved Communities Through the Federal Government](#) (EO 13985) and affirmed in the [Executive Order on Further Advancing Racial Equity and Support for Underserved Communities Through the Federal Government](#) (EO 14091).

Over 20 federal agencies and departments and 10 organizations in the Executive Office of the President are members of the SED. The SED has established five subgroups to advance progress on different aspects of the EDWG recommendations. Each subgroup is at a different stage of implementation, with fast tracking of those with deadlines established in executive actions. As the work evolves, the SED will establish and sunset subgroups. Descriptions of current subgroups follow:

(1) **Sexual Orientation, Gender Identity, and Variation in Sex Characteristics Data Subcommittee (SOGI Data Subcommittee)**, as outlined in the [Executive Order on Advancing Equality for Lesbian, Gay, Bisexual, Transgender, Queer, and Intersex Individuals](#) (EO 14075)

The SOGI Data Subcommittee is charged with developing the Federal Evidence Agenda on LGBTQI+ Equity and supporting agencies as they create and implement SOGI data action plans in response. To advance equity and improve the lives of LGBTQI+ people, the federal government must gather the evidence needed to understand the community, their interactions with federal systems, and their access to and use of policies and programs that enable their health and well-being.

This subgroup includes over 40 technical and subject matter experts (SMEs) from more than 20 departments and agencies across the federal government, including many individuals who identify as LGBTQI+ and bring lived experience to the work alongside their technical expertise.

*Key Deliverables for 2023:*
- Report on Federal Evidence Agenda on LGBTQI+ Equity
- Templates and resources to help agencies develop SOGI data action plans
- Monitoring and support of the implementation of SOGI data action plans
- 1-year progress report

(2) **Galvanizing Diverse Partnerships Across Government and Civil Society and Enabling Accountability Through Improved Data Access and Transparency Interagency Working Group (Engagement and Accountability IWG)**

The Engagement and Accountability IWG will explore, develop, and promote methods for agencies to improve production, dissemination, and use of federal equity-related data and statistics with members of the public, particularly from underserved communities. This subgroup has more than 20 members representing 12 government agencies.

*Key Deliverables for 2023*:
- Listening sessions to support community engagement and accountability
- White paper with case studies of community and research collaborations and lessons
- Release of government agency responses to the Request for Information (RFI) to further the Fifth Open Government National Action Plan

(3) **Equitable Federal Funding IWG (EFF IWG)** to support the Executive Order on Implementation of the Infrastructure Investment and Jobs Act (EO 14052) mandate to invest Bipartisan Infrastructure Law dollars equitably and the Executive Order on the Implementation of the Energy and Infrastructure Provisions of the Inflation Reduction Act of 2022 (EO 14082) to create equitable economic opportunity through the Inflation Reduction Act (IRA).

The EFF IWG will build the capacity of agencies to conduct rapid equity assessments to inform program design and delivery of federal funding. This subgroup has over 20 members representing 10 government agencies.

*Key Deliverables for 2023*:
- Toolkit of resources including templates, how-to guides, and code and scripts for restructuring data and conducting analyses to enable scaling across funding programs
- Minimum of seven rapid equity assessments conducted for programs across the federal government
- Participation in at least four knowledge-sharing events to communicate successes and lessons learned

(4) **Criminal Justice Statistics IWG**, as outlined in the Executive Order on Advancing Effective, Accountable Policing and Criminal Justice Practices to Enhance Public Trust and Public Safety (EO 14074)

The Criminal Justice Statistics IWG will identify opportunities and barriers to infusing an equitable data framework into data collection, use, and transparency related to state, Tribal, local, and territorial law enforcement activities. This subgroup includes over 20 members representing 13 government agencies.

*Key Deliverables for 2023*:
- Stakeholder engagement
- Data Collection, Use and Transparency Practices of Law Enforcement Agencies report submitted to the president
- Event highlighting the report and next steps for public- and private-sector stakeholders

(5) **Equitable Data Community of Practice**
The Equitable Data Community of Practice subgroup brings together federal employees to share knowledge and develop resources to support equitable data practices. More than 300 federal employees are currently participating in this community of practice.

*Key Deliverables for 2023*:
- Equitable Data Solutions Exchange webinar series
- Development of a continuously evolving shared resource repository for federal data practitioners
- Launch of data equity champions program, which will provide structured leadership opportunities for data equity leaders

# Recommendation 1: Make Disaggregated Data the Norm While Protecting Privacy

Disaggregated data—data about groups separated out by race/ethnicity, gender identity, veteran status, geography, sexual orientation, income level, disability status, rural/urban location, and other factors—are essential for identifying and remediating disparities in how the government serves American communities, particularly those that have historically been overburdened and underserved.

The benefits of collecting, holding, and sharing information about smaller populations, however, must be considered in the context of the increased risk of identification to the individuals in those populations.

Federal data used to generate demographic statistics are generally sourced from program applications, data received from state governments, and statistical surveys. Though baseline tasks, such as modernizing minimum race and ethnicity categories, are relevant to both forms and surveys, the responsible collection and use of disaggregated demographic data will differ depending on the context.

While foundational work is underway across federal agencies to responsibly collect, generate, and analyze disaggregated data, public stakeholders have identified specific areas to focus on and have also noted that greater timeliness, geographic granularity, and demographic details would make it easier to align civil society and state and local government work with federal efforts.

## Revise Statistical Policy Directive 15 on Race and Ethnicity Standards Across the Federal Government

On January 26, 2023, the OMB Office of the Chief Statistician released an initial set of recommended revisions for how the federal government collects and reports data on race and ethnicity. These recommendations were proposed by an Interagency Technical Working Group.

This is the next step in the process that began in summer 2022 with a clear goal: to ensure that the standards better reflect the diversity of the American people. OMB Statistical Policy Directive No. 15: Standards for Maintaining, Collecting, and Presenting Federal Data on Race and Ethnicity (SPD 15) has not been updated since 1997.

This revision process is designed to ensure that the standards better reflect "the societal, political, economic, and demographic shifts" in the United States. The OMB Interagency Technical Working Group launched a new website at SPD15revision.gov so that stakeholders can stay informed of opportunities for public input and track the working group's progress.

## Improve Availability of Data Disaggregated by Detailed Race and Ethnicity

In July 2022, the Chief Statistician's office issued flexibilities and best practices for disaggregating race and ethnicity data that agencies can use immediately. These flexibilities specify how agencies can use more detailed race and ethnicity categories as long as the categories can be aggregated to the existing minimum categories of SPD 15. For example, an agency can collect data on groups such as Chinese, Asian Indian, Filipino, etc., that together roll up into the existing category of "Asian."

## Interim Progress on Data Disaggregation and Disaggregated Statistical Estimates

All SED member agencies are boosting their efforts to collect and acquire disaggregated data and publish disaggregated statistics through

- asking additional questions on surveys and administrative forms,
- increasing sample sizes in surveys, or
- aggregating data over multiple survey years.

Agencies are also developing best practices for measuring demographic characteristics that are important for understanding and addressing inequities. Using select examples, this section gives a progress update on agency efforts to collect and publish more disaggregated data on race and ethnicity and other demographic characteristics while protecting privacy.

Examples:

- For the first time, a representative sample of 9th grade American Indian/Alaska Native (AI/AN) students is included in the newest high school longitudinal study from the Department of Education's National Center for Education Statistic (NCES). This is the first time that the sample size is expected to be large enough to track AI/AN students' experiences and outcomes long term, into postsecondary education and the world of work.
- For the first time, in December 2021, the Small Business Administration (SBA) released federal contracting data disaggregated by race and ethnicity. These disaggregated data on federal contracting will help the Administration meet its goal of increasing the share of contract dollars awarded to small disadvantaged businesses to 15 percent by 2025.
- In May 2022, the Interagency Council on Statistical Policy (ICSP) released an inventory of federal statistical datasets allowing disaggregation of Asian American, Native Hawaiian, and Pacific Islander (AA and NHPI) communities, pursuant to President Biden's Executive Order on Advancing Equity, Justice, and Opportunity for Asian Americans, Native Hawaiians, and Pacific Islanders (EO 14301). This curated collection serves as a model for agencies that want to expand disaggregation to other categories and datasets. It gives stakeholders and researchers a single place to find disaggregated data on the AA and NHPI communities.

- BJS [expanded and reallocated the sample of its National Crime Victimization Survey](#) (NCVS), the nation's primary source of information on criminal victimization, to be able to produce victimization estimates for states and substate geographic areas. As of March 2023, approved researchers can begin to securely access and work with representative estimates of violent and property victimization for the 22 most populous states.

## Privacy and Confidentiality Practices

Unfortunately, challenges to protecting public data from re-identification risk are growing at the same time that demand for access is increasing.[3] Publicly releasing data and statistics on particularly small population groups, including populations with intersectional characteristics (e.g., federal aid applicants from a rural community who are transgender and Black, students in a given school who are English language learners and have a disability) or those who receive a geographically and/or time-limited benefit (e.g., recipients of disaster assistance or discounted broadband service), increases the risk of identifying individuals.

As agencies increase their generation and use of disaggregated data, they are responsible for complying with applicable laws, regulations, and policies related to protecting privacy and confidentiality.

For this progress report, SED member agencies highlighted how they are adopting approaches to mitigating the risk of re-identification when increasing access to disaggregated data. Techniques include

- masking personally identifiable information (PII),
- increasing options for controlled access to information that cannot be publicly released, and
- creating processes for reviewing information products for potential disclosure concerns before they are publicly released.

By focusing on equitable data, agencies have increased the relevance of these cutting-edge disclosure avoidance practices and have rapidly advanced discussions about how to best keep small populations visible while protecting privacy.

To address these challenges, statistical agencies are advancing opportunities to access data in restricted settings. In December 2022, leaders of the federal statistical system, led by the Chief Statistician of the United States, launched a [standard application process](#), as required under recent legislation designed to expand the nation's capacity for evidence-building. This critical first step creates a single front door for finding and requesting data access from statistical agencies for evidence-building purposes—without needing to already know which agency houses the data sought or having to navigate various agency websites and request processes.

Additionally, several agencies use the shared infrastructure of the [Federal Statistical Research Data Centers](#), where qualified researchers can access restricted-use microdata from a variety of statistical agencies. Agencies also describe using dedicated disclosure avoidance personnel and review

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[3] See for example: Federal Committee on Statistical Methodology (2022), Data Protection Toolkit: Report and Resources on Statistical Disclosure Limitation Methodology and Tiered Data Access (formerly "Statistical Policy Working Paper #22"), rev. 2022.01 (11/28/2022).

procedures so that any disaggregated data is released at the appropriate level to balance the public's need for important information with privacy protections.

Innovations in privacy protection continue, for example, through the General Services Administration (GSA) 10x program and in collaboration with the United Nations Privacy-Enhancing Technology Lab, the Census Bureau is piloting privacy enhancing technologies (PETs) that allow for privacy-preserving data sharing to better balance privacy and utility.[4]

## Establish Effective Practices for Measuring Sexual Orientation, Gender Identity, Disability, and Rural Location

When the EDWG engaged community advocates and agencies to develop its May 2022 recommendations, both groups noted that the lack of government-wide guidance for collecting disaggregated demographic variables such as sexual orientation, gender identity, disability, and rural location hinders the ability to examine equity across these communities.

Since then, the federal government is making progress establishing evidence agendas and promising practices for collecting, protecting, and using data about sexual orientation and gender identity (SOGI). These agendas and practices create a possible path for developing best practices for other demographic characteristics such as disabilities and rural/small area geographies.

Released in January 2023 pursuant to the Executive Order on Advancing Equality for Lesbian, Gay, Bisexual, Transgender, Queer, and Intersex Individuals (EO 14075), the Office of the Chief Statistician's Recommendations on the Best Practices for the Collection of Sexual Orientation and Gender Identity Data on Federal Statistical Surveys provides current best practices for collecting and protecting self-reported SOGI data on federal statistical surveys, including several examples of question formats that agencies can use depending on the context and their analytical goals.

The SED SOGI Data Subcommittee's Federal Evidence Agenda on LGBTQI+ Equity also pursuant to EO 14075, explores how to most effectively put that technical guidance into action to build evidence to advance LGBTQI+ equity. In doing so, the Federal Evidence Agenda on LGBTQI+ Equity represents a unique opportunity to help improve the health and well-being of LGBTQI+ people.

For the first time, the federal government has laid out a roadmap to systematically and strategically build the evidence needed to inform policies and programs that will improve the lives of LGBTQI+ individuals and their families. By identifying those questions that, when answered, will enable the federal government to better serve this population, the Evidence Agenda serves as a call to action for federal agencies and the broader external community. Moreover, it provides guidelines and tools for federal agencies as they approach collecting and using demographic data on sexual orientation and gender identity to ensure that they are doing so inclusively and responsibly.

The SED will begin building comparable best practices for other high-priority under-collected demographic variables, including disability and rural location status, through its Equitable Data Community of Practice.

As the work matures, the SED will likely create additional IWGs and assign specific deliverables to advance equitable data for other populations under-represented in federal datasets. To facilitate the

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[4] PETs include secure multi-party computation, homomorphic encryption, secure enclaves, and differential privacy, the details of which are beyond the scope of this report.

progress in those areas, the SOGI Data IWG is documenting its process, so it can be used for other populations.

As the SED explores these systemic solutions at large, SED member agencies are already making progress on incorporating sexual orientation, gender identity, disability, and small area geographic data into data products, where appropriate.

Examples:
- The Census Bureau is continuing research on how to best add both sexual orientation and gender identity questions to household surveys.  Collecting this data on the American Community Survey, one that many agencies use when conducting equity assessments, and other Census household surveys, could help the federal government better serve the LGBTQI+ community by providing valuable information on their jobs, educational attainment, home ownership, and more.
- The National Center for Health Statistics conducted promising new research about using a single question to collect information about gender identity.
- The Department of Transportation (DOT) is implementing Justice40 in part by ensuring that its discretionary grant programs include considering impacts to historically underserved or overburdened communities. Small area geographies are critical for such consideration because large areas can mask disparities. In 2021, DOT built the publicly available Transportation Disadvantaged Census Tracts tool, which enables mapping project areas against census tracts. Census tracts are neighborhood-level geographies generally home to between 1,200 and 8,000 people. This comparison allows the DOT to determine level of disadvantage according to DOT's Justice40 definition.
- BJS has used existing data to create topical reports that present disaggregated estimates by disability status, sexual orientation, and gender identity, among other characteristics. For example, the Crime Against Persons with Disabilities, 2009—2019 – Statistical Tables report compares victimization statistics of persons with and without disabilities by demographic characteristics and disability type.[5]
- For the first time, in 2023, the Department of Housing and Urban Development (HUD) proposes to ask questions about sexual orientation and gender identity in the context of the American Housing Survey for adult respondents (self-reported). HUD will also test item nonresponse to both of these questions for other adult household members (by proxy). These test results, along with further research on proxy SOGI response accuracy, will inform decisions to include proxy questions about sexual orientation and gender identity in future American Housing Surveys.

## Recommendation 2: Catalyze Existing Federal Government Infrastructure to Leverage Underused Data

Addressing underutilization of existing federal data for equity assessment at scale across the federal government will require the joint efforts of agency chief data officers, evaluation officers, privacy

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[5] Other examples include Hate Crime Victimization, 2005-2019,  which explores whether the victim of a crime thought the offender(s) perpetrated the crime because of a bias against a particular characteristic such as disability status or SOGI status and Violent Victimization by Sexual Orientation and Gender Identity, 2017–2020.

officials, and statistical officials, as well as data practitioners embedded in program offices and on agency-wide teams.

Below are some recent developments in mining available data to understand agency progress in meeting the Biden-Harris Administration's equity goals.

## Increase the Use of Data Through Data Visualization and Analyses

Agencies collect many types of data while administering their programs. But data themselves are necessary but not sufficient to promote understanding and drive action. To leverage disaggregated data to inform more equitable policies and programs, the data must be analyzed and presented in innovative and more engaging ways—including using data visualization.

Federal data practitioners are using data visualization software plus existing administrative and survey data to develop internal dashboards that yield new, actionable insights. Such dashboards can be particularly valuable as a tool for improving outcomes when they give visibility into specific organizational units and are benchmarked to measurable goals.

Examples:

- The Department of Energy (DOE) Small Business Innovation Research (SBIR) and Small Business Technology Transfer (SBTT) Offices track application and award demographics of business owners. They share this information internally with DOE sponsoring offices to inform award decisions. For example, understanding how women- and minority-owned small business are under-represented will help DOE reach its goal to distribute 15 percent of SBIR/SBTT Phase 1 awards to these groups by fiscal year 2025, per the DOE Agency Equity Action Plan.
- The Department of Agriculture (USDA) has used its enterprise data platform to build a collection of internal equity-focused dashboards to improve visibility and insights into programs such as
    - Tribal investments,
    - loan applications,
    - nutrition education,
    - civil rights impact analyses, and
    - small business investment.
- The National Science Foundation (NSF) is developing a dashboard to track funding proposals with principal investigators from groups underrepresented in science, technology, engineering, and mathematics (STEM) and from underserved institutions. The dashboard will allow internal NSF users to view this data on a granular level by directorate, division, state, institution, and other parameters. It will also help monitor NSF progress toward the goal of increasing proposals by 10 percent.
- The Department of the Interior (DOI) used DOI and Census Bureau data to benchmark characteristics of people who submitted outdoor recreation reservations through Recreation.gov against the characteristics of the general population to identify which demographics are under-utilizing these public resources.
- In 2021, the Department of State established a diversity, equity, inclusion, and accessibility (DEIA) Data Working Group that developed a DEIA data policy and data-sharing agreements within the agency so that the DEIA Working Group could conduct barrier analyses and develop dashboards for internal users, including the workforce and department leaders, as well as

reports for external stakeholders such as the Senate Foreign Relations Committee and the general public.

## Improve Findability of Underused Data to Inform Equity Assessments

Within government agencies, data needed for robust equity assessments are often hard to find and access. This applies both to internal data within a given department and to the vast datasets available through the federal statistical system. Below are some examples of how agencies are working to overcome this challenge:

- The Department of Homeland Security (DHS) Office for Civil Rights and Civil Liberties is working with the Homeland Security Operational Analysis Center to develop an equity data resources catalog of publicly available and internal data to enable more focused equity decision-making.
- In summer 2022, the Department of Health and Human Services (HHS) Data Council Equity Data Subcommittee conducted a survey of administrative data collected by HHS-funded programs that could be used to identify and reduce disparities. The survey included both *what* demographic characteristics programs are collecting (e.g., gender identity, veteran status, immigration status, primary language, and disability or functional impairment) and *how* they are collecting the data (e.g., collecting age data by asking birthdate, current age, or current age range). Next steps include developing a brief for public dissemination and a work plan to address the identified data gaps.
- At the request of the U.S. Trade Representative, the independent U.S. International Trade Commission released a report in November 2022 that catalogued information on the distributional effects of trade and trade policy on underrepresented and underserved communities. The report summarizes the literature and confirms clear gaps in trade data focusing on Tribal nations, Indigenous and AA and NHPI workers; workers with disabilities; and workers based on their race/ethnicity, gender, and sexual orientation.
- The National Aeronautics and Space Administration (NASA) DEIA Analytics Capability effort is targeting multiple external data sources that are currently under-utilized or not used at all into its Enterprise Data Platform to enable easier, enhanced analytics for equitable delivery of public programs and workforce DEIA.[6] Data sources include the American Community Survey, System for Award Management (SAM), USAJOBS, and USA Spending.
- In April 2022, to support implementing the Federal Data Strategy and the Evidence Act, the Federal Chief Data Officer Council (CDO Council) issued a report on Enterprise Data Inventories, addressing barriers and opportunities for agencies to help analysts find and use their own agency's data.

## Expand Protected Interagency Data Sharing for Equity Assessment

During engagement to develop the EDWG recommendations, stakeholders inside and outside of the federal government described the need for better privacy and legal frameworks to permit the safe sharing of person-level data among agencies to inform equity assessments for programs.

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[6] See "Performance Goal 4.4.1: Execute a data acquisition, ingestion, and cataloging blitz of critical data sources into NASA's Enterprise Data Platform (EDP) to address data gaps preventing DEIA analytics needed to ensure mission success and safety" on p. 25 of the FY22-26 Diversity, Equity, Inclusion, and Accessibility (DEIA) Strategic Plan.

In 2021, the federal CDO Council convened the Data-sharing Working Group (DSWG) to improve the CDO Council's understanding of the varied data-sharing needs and challenges across the federal government. In April 2022, the CDO Council's DSWG issued findings and recommendations with concrete recommendations for

- expediting the data sharing agreement process,
- improving data awareness, and
- improving data trustworthiness.

These recommendations ranged from targeted, short-term tasks to broader, more holistic efforts. For example, one specific recommendation was that agencies build agency data use agreements with standard language that can be used to inform draft data sharing agreements. The Department of Commerce is already doing this by using agreements from its internal bureaus to create a catalog of templates for departmental use.[7]

## Enhance Opportunities for Equity Assessment Through Data Linkage

During their lifetimes, Americans provide demographic information to federal agencies by completing statistical surveys and administrative forms. Historically on administrative forms, federal agencies have not asked for demographic data that is not directly needed for determining an applicant's eligibility. Given this context, a common question posed by benefit- and service-providing agencies to the EDWG was how they best could obtain the demographic data necessary to identify inequity across applicants and beneficiaries.

Public stakeholders are similarly interested in this issue. They have specific suggestions to use demographic data from statistical surveys to enhance census-tract level equity assessment of items like mortgage performance and federal nutrition programs. One of the most promising practices for meeting this need is to link data across agencies. Though not without potential challenges, data linking can offer many benefits including making use of data that have already been collected elsewhere to provide information missing from the original source.

Agencies are expanding protected access to data for equity assessment through bilateral or trilateral agency partnerships that allow the secure linking of benefit program and statistical survey datasets to derive insights on equity. As discussed in the EDWG Vision for Equitable Data, one option is for service or benefit programs to share data with one of the 13 federal statistical agencies that have the experience and methods to generate disaggregated estimates of program participation in ways that protect against inadvertent disclosure of identifiable information.[8]

Examples:

- In a collaboration with the Department of Veterans Affairs (VA), the National Center for Health Statistics (NCHS) linked the National Health Interview Survey and National Health and Nutrition Examination Survey data to VA administrative data. The linkage provided insights on a wide range of health-related topics for veterans, including use of VA benefit programs.

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[7] https://www.gao.gov/assets/gao-23-105514.pdf

[8] In the Vision for Equitable Data report, the EDWG highlighted work between the WIC and SNAP programs and the Economic Research Service and the Census Bureau to understand the demographic characteristics of program participants and eligible nonparticipants.

- Through an interagency agreement with the Census Bureau, BJS is linking individual-level data from the National Corrections Reporting Program and Survey of Prison Inmates with other federal and state datasets, including employment and earnings data from the Longitudinal Employer-Household Dynamics program. As a result, it is now possible to estimate the percentage of formerly incarcerated people who were employed in the 4 years after release, as well as their earnings and employment sector.
- The FY23 Budget includes funding so the Census Bureau can help social safety net and business assistance programs understand the demographic characteristics of their participants, grantees, and customers. That information will help the agency make programmatic and policy decisions about their impact on underserved communities.

## Recommendation 3: Build Capacity for Robust Equity Assessment for Policymaking and Program Implementation

To facilitate progress in equitable policymaking and program implementation, the EDWG recommendations call for strengthening the federal government's capacity for data analysis and evaluation, with an aim toward enabling robust assessment of compounded experiences and overlapping identities. The EDWG recognizes that to implement this recommendation, agencies and program offices would need to further invest in the statistical, evaluation, and data science expertise necessary to design and conduct equity assessments. Agencies have also identified the need for enhancing infrastructure such as business analytics software, data sharing agreements, and data governance frameworks.

All SED member agencies report significant activity on this recommendation. This progress bodes well for accelerating, deepening, and sustaining progress on equitable data over the next 2 years and beyond as the foundations for this work are established.

### Invest in Human Capital Necessary for Equity Assessment

#### *Training and Technical Assistance*

The federal workforce is the greatest asset the government has in its drive to use data to deliver more equitable outcomes. Federal agencies are using several mechanisms to boost the skills and knowledge of their workforce with the goal of facilitating equity assessments. Efforts include training on various data science and equity issues and using equitable business practices.

Examples:

- HHS established the HHS Equity Technical Assistance Center to provide training, tools, and technical assistance for HHS components to build internal capacity for making HHS policies, programs, research, and analyses more equitable.
- The Environmental Protection Agency (EPA) National Center for Environmental Economics provides training, workshops, and guidance to educate analysts on the basics of conducting environmental justice analyses for rulemaking, explore ways to better leverage existing data and methods, and identify opportunities to improve data and methods.
- The DHS Program Analysis & Evaluation Team has offered multiple trainings for the department's evidence and evaluation workforces, with guest speakers from academia and co-trainers from other agencies.

- In March 2022, the Federal CDO Council established the Data Ethics and Equity Working Group to help the council understand, foster, and support data ethics and data equity activities across the federal government.
- The Evidence Team at OMB worked with agency partners to develop and execute a five-part workshop series for federal staff on equity in evaluation.

## Federal Workforce DEIA and Equity

While federal agencies are considering when and how to obtain demographic characteristics directly from administrative forms and surveys, they are also exploring the demographics of their workforce through internal surveys and applications for employment. Agencies are pursuing these activities as part of their implementation of the June 2021 Executive Order on Diversity, Equity, Inclusion, and Accessibility in the Federal Workforce (EO 14035). Many SED member agencies see value in building enterprise-wide data capacity that can support both workforce DEIA and their own goals of delivering more equitable outcomes for the American people, including implementing the EDWG recommendations.

Agencies have built dashboards and tools, created working groups, and drafted reports to better understand both their internal workforce makeup as well as those for external partners such as contractors and field workers, and to identify barriers to establishing diverse workforces.

In fact, the Office of Personnel Management has set an agency priority goal of 75 percent of target agencies using a DEIA dashboard by the end of FY23. The talent and data infrastructure required for DEIA workforce efforts align with those needed to, for example, influence the design of public-facing STEM programming to encourage participation from historically under-represented populations.

## Hiring Data Talent and Building Equitable Data Teams

Over the last 2 years, federal agencies have onboarded staff with technical expertise in such areas as data science, analytics, coding, economics, evaluation science, and data management. A data-driven approach to increase the diversity of the federal workforce inevitably benefits this rapidly expanding workforce of data practitioners. Agencies are thinking about more than individual hires. They are also building teams and working groups focused on collecting and using equitable data. Agencies are also directing substantial existing talent to work on equity-related research.

The Federal Emergency Management Agency (FEMA) has been working toward equitable data capacity at multiple levels throughout the agency. In October 2021, FEMA established the Equity Data & Analytics Working Group. This group reports to and supports the agency's Equity Enterprise Steering Group in implementing its vision for enhancing FEMA's ability to use data to evaluate and increase equitable outcomes through program delivery.

In addition, FEMA programs such as Individual Assistance began recruiting and hiring data and program analysts specializing in equity. These full-time employees focus their time on understanding and incorporating equity considerations into analysis of program delivery. FEMA has also integrated personnel dedicated to supporting analytics at field offices during disaster operations—a role called field leader data analytics advisors—to support data-driven decision making; these individuals can help incorporate equity data analysis across all of FEMA's Stafford Act Public Assistance program areas.

## Communities of Practice and Workgroups

Thousands of data scientists, economists, program analysts, social scientists, evaluators, and statisticians collect and use data to serve the American people every day. With advances in peer-to-peer communication and a shift toward more virtual working environments across the federal government, knowledge workers such as these are cooperating and collaborating as never before. The recent advances in communication and collaboration have led to federal agencies establishing both formal and informal communities of practice (CoPs) to foster knowledge sharing and advancing analytical methods. Many of these CoPs use their collective expertise to advance equitable data efforts.

Examples:

- The Census Bureau's Data Science Hub is connecting Census Bureau practitioners to learn about data science and share resources.
- HUD's Knowledge Collaborative focuses on improving DEIA-informed approaches to evaluation design and implementation.
- NASA's DEIA Data Analytics Working Group supports equity analyses across the NASA enterprise through the footprint of their Office of Diversity and Equal Opportunity.
- VA's Demographic Data Working Group is standardizing the collecting and reporting of demographic data across all VA systems.

Federal government-wide, the SED hosted the first of a series of monthly meetings of the Equitable Data CoP in January 2023 to accelerate and deepen adoption of promising practices across agencies.

## Integration into Policy

To accord with EO 13985 signed by President Biden on January 20, 2021, agencies have been incorporating the principles of equity and equitable data into their policies and plans. Many agency Equity Action Plans, which were delivered in early 2022, explicitly refer to the role of disaggregated data in conducting equity assessments. Implementing the Evidence Act provides ample opportunity for making concrete the priorities of equity and equitable data as agencies infuse equitable data into their latest learning agendas, capacity assessments, annual evaluation plans, and evaluation policies.

Many agencies also incorporate equity into evaluation frameworks, recommendations for future research, and agency-wide policy directives and statements. The OMB Evidence Team developed the new Learning Agenda Questions Dashboard on Evaluation.gov, which compiles all agency learning agenda questions in one place and allows users to search by cross-cutting themes including data, equity, and DEIA.

## Using Recovery Funding and Infrastructure Implementation to Institutionalize Equity Assessments

Massive amounts of coordinated federal funding through the American Rescue Plan (ARP), Bipartisan Infrastructure Law (BIL), and Inflation Reduction Act (IRA) provide an unprecedented opportunity to make the framework of equitable data operational across government. This means, where feasible and permissible, that agencies are exploring ways to do the following:

- expand reporting requirements for disaggregated data collection across key programs without overburdening recipients
- build agency capacity for rapid equity assessments to inform program implementation

- conduct evaluations to build evidence for future programs and policies

As the EDWG recommendations noted, such capabilities are critical for ensuring that projects benefit underserved communities and create opportunities for historically excluded workers.

The success of early Biden-Harris Administration actions to incorporate equity principles into the ARP's more than 200 programs and services are described in the May 2022 Advancing Equity through American Rescue Plan Programs report.

With EO 13985 as a foundation, coupled with other guidance issued in memoranda M-21-20 and M-21-24, the ARP Implementation Team developed an equitable implementation framework to assess progress and identify where additional effort was required throughout the implementation process. The intentionality of this implementation led to an historically equitable recovery, exemplified by marked improvements in measures of unemployment across Black, Hispanic, and Asian populations, rural communities with persistent poverty, youth, women, and the longtime unemployed.

The ARP Implementation Team published an ARP Equity Learning Agenda, which provides an overarching framework to guide the evaluation and related evidence-building activities of ARP investments on questions of equity over the lifespan of the various programs and beyond. In addition, the GSA has awarded a multi-year contract to examine the role of the ARP in advancing equitable outcomes across a range of federal, state, and locally implemented programs. The Office of Evaluation Sciences at GSA will support the contract in partnership with the OMB Evidence Team, the ARP Implementation Team, and other agency partners.

Building on lessons learned from ARP and guidance issued in memorandum M-22-12, the SED Equitable Federal Funding IWG (EFF IWG) is creating and using equitable data to support the equitable implementation of the BIL. The BIL, signed by President Biden in November 2021, includes over $1 trillion in federal investment over 5 years.

To accomplish this, in 2022 the EFF IWG created a process to scope and answer emergent, actionable research questions to inform equitable delivery of the BIL. These "rapid equity assessments" represent discrete projects that use equitable data to improve processes and policies along the entire grant life cycle.

To date, the EFF IWG, in collaboration with agency program staff, has conducted many rapid equity assessments including those that evaluate the geographic patterns of programs directly serving Americans and the distribution of project announcements throughout the country to better understand patterns of access among underserved communities.

Additionally, the EFF IWG has developed a way to apply geospatial analytical techniques to data from outreach webinars to determine where more technical assistance or local partnerships may be needed to reach the most disadvantaged communities. Because they are conducted by and with agency data practitioners, these rapid equity assessments leave behind lasting improvements to the standing processes that government agencies use to implement their programs.

**Building USDA Capacity to Serve Farmers and Ranchers**

**Agency: Department of Agriculture**

The Department of Agriculture's (USDA) Farm Service Agency (FSA) created a new data team within FSA's Farm Programs division to query data, build reports, and develop interactive dashboards, including numerous data calls for diversity and race, ethnicity, and gender reports. This is in addition to the team that already exists within FSA's Farm Loan Programs to do this work on its loan customers and policy needs.

FSA's Farm Loan Programs and Farm Programs have diversity dashboards with statistics on participation, loan obligations, and payment rates to underserved producers. FSA has used these dashboards and other resources for outreach programs and has created other tools to help better communicate to these producers.

Under the previous administration's Coronavirus Food Assistance Program (CFAP), only 4 percent of funding went to socially disadvantaged farmers. After identifying funding gaps, USDA announced Pandemic Assistance for Producers, a newly established initiative committed to distributing and directing resources more equitably, especially to the people and sectors who needed assistance the most. Among other funding opportunities, the Pandemic Assistance Initiative included re-opening signup for CFAP2, and led to

- $700 million to relieve small producers, processors, farmers markets, and seafood vessels affected by COVID-19
- $700 million in grants to provide relief to farm and food workers affected by COVID-19
- $2 million to establish partnerships with organizations to provide outreach and technical assistance to historically underserved farmers and ranchers

CFAP2 saw an approximately 21 percent increase of CFAP enrollment applications from socially disadvantaged producers.

## Recommendation 4: Galvanize Diverse Partnerships Across Levels of Government and the Research Community

State, Tribal, local, and territorial governments are essential partners for establishing durable, high-quality, and equitable data supply chains across many domains, such as food and disaster assistance, student performance, disease surveillance, and unemployment insurance (UI). Nongovernmental organizations such as think tanks, local data intermediaries, advocacy groups, community-based organizations, and academic institutions are also key players in the equitable data ecosystem, producing analyses that turn disaggregated data into evidence that informs policy advocacy and local action and helps local communities connect with federal data.

To fully realize the potential of equitable data to drive better outcomes for all Americans, it will be especially necessary to create incentives and pathways for increased diversity and representation among public data practitioners and research community participants.

Feedback from public stakeholders emphasizes the need for capacity-building for equitable data at all levels of government, including naming a point person responsible for coordinating data sharing in each government body, creating standard operating procedures around data collection and reporting

to enable comparisons across jurisdictions, and upskilling the public workforce to maintain data quality and governance.

Public stakeholders also identify the value of having reusable data sharing agreement language, collaboratively designed with federal agencies, states, and communities, to set data management standards and establish processes for safely sharing fine-grained and de-identified datasets across levels of government and with the public. Like the CoPs emerging within the federal government, stakeholders suggest tapping into more local and regional data collaboratives and exchanges to enable the sharing of information and best practices, training, and materials, including materials that help standardize and professionalize the role of state and local chief data officers.

Over the last 2 years, agencies have made significant progress in areas designed to enhance current community engagement, data access, and data sharing across levels of government, academia, and the public. For example, agencies have launched efforts to synchronize data collection and use across federal, state, and local entities; expand opportunities for historically underrepresented scholars; and engage local communities in conversations around data.

## Facilitate Increased Federal–State–Local–Research Partner Data Sharing

Agencies are pursuing avenues to share data with state, Tribal, local, and territorial governments, as well as university partners. These agreements have diverse origins, ranging from the need to assess program effectiveness to managing crises, building evidence, and mitigating future risk.

Examples:

- The Department of Labor (DOL) established data partnerships with states to enable the analysis of UI data. This will allow the agency to better understand who applies for, receives, and is denied UI benefits, and identify opportunities to remediate racial or geographic disparities. State unemployment insurance data have generally not been examined through an equity lens, so this project can have significant impact.
- The Center for Disease Control and Prevention's (CDC) HHS Protect is a common operating picture and central hub to collect, integrate, and share COVID-19 data in near real-time across federal agencies and with state, Tribal, local, and territorial partners. HHS Protect uses data from more than 300 sources and is accessible to over 3,900 unique users across more than 30 federal agencies, 56 states and territories, and the private sector. In the last 2 years, HHS Protect has enabled increased public awareness of disease impact by providing pandemic-related data on U.S. government data-sharing portals such as CDC COVID-19 Data Tracker, healthdata.gov, and data.cdc.gov, as well as local and state public health websites.
- FEMA developed general pre-approved data elements that can be shared immediately with other levels of government upon Presidential approval of an emergency or major disaster declaration under the Stafford Act based on the type of incident and authorized programs (such as public assistance, individual assistance, and mitigation), to rapidly assess unmet needs of different populations during incidents while still protecting the privacy of individual survivors.
- In April 2022, DOL announced a partnership with the Job Quality Measurement Initiative, a network of academic researchers, workforce practitioners, business representatives, and philanthropic organizations aimed to better measure, analyze, and report on job quality and equity. Better data will inform federal policies and programs that are intended to expand access to good jobs, especially for historically underserved populations.

## Expand Opportunities for Historically Underrepresented Researchers

The EDWG recommendations are clear on the importance of a diverse and inclusive range of researchers conducting their own equity analyses and contributing to government equity efforts. Member agencies such as NASA, DOE, and USDA's Animal & Plant Health Inspection Service are facilitating research engagement with scholars from underrepresented backgrounds, including historically Black colleges and universities (HBCUs) and minority-serving institutions (MSIs). These efforts include initiating research studies to identify and address barriers to participation; streamlining funding mechanisms; and offering paid research and engineering internships, apprenticeships, and research experiences for faculty. As NASA notes, "The overarching goal is to create an environment where underserved communities are better equipped to partner with NASA." DOE describes such arrangements as providing the opportunity "to discover new research voices and technical talent to diversify our research and reviewer bases."

The NSF, in partnership with OSTP, OMB, and other federal agencies, recently launched the Analytics for Equity Initiative. This new initiative links interested researchers directly with federal agencies seeking to answer research questions captured in their learning agendas in five equity-related research themes. This effort's goal is to fund researchers to produce rigorous empirical evidence and research in equity-related topics that federal agencies and other organizations can use to increase the impact of equity-focused evidence-based strategies. The Analytics for Equity Initiative places a very strong emphasis on broadening participation by encouraging proposals from MSIs and other organizations that have not typically engaged directly with federal agencies.

Initiatives to expand the nation's capacity for evidence-building are also poised to reduce barriers for all researchers to find, access, and use disaggregated data to inform the delivery of more equitable outcomes. The Advisory Committee on Data for Evidence Building recently released its recommendations for the National Secure Data Service envisioned in the Evidence Act. One recommendation included the need to routinely engage with key partners groups and user communities about their data access needs. The recent CHIPS and Science Act authorizes funding for "a demonstration project…to inform the full implementation of…a governmentwide data linkage and access infrastructure for statistical activities conducted for statistical purposes." These initiatives are poised to be a launchpad for additional support for greater evidence-building by state, Tribal, local, and territorial governments, researchers, businesses, community-based organizations, advocacy groups, and individual members of the public.

## Engage Local Communities in Conversations Around Data

Much of the work in engaging representatives of the communities that access and participate in federal programs is happening in agencies that provide direct services. The process of writing the equity action plans inspired many agencies to conduct outreach. These efforts included listening sessions,[9] public comment periods, crowdsourcing campaigns, and roundtables to assess internal processes that relate to the expressed needs of the community, with an eye toward more equitable

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[9] Listening sessions are facilitated discussions with groups of people, designed to gather information about their experience in a particular area.

outcomes. Agencies and SED IWGs are also incorporating engagement with local communities into their ongoing equitable data activities.

In doing so, many are empowering communities to contribute to efforts to build equitable data capacity.

Examples:

- To build partnerships and data sharing across and beyond government, EPA shaped its competitive grants for community monitoring funded under the ARP, a one-time supplemental appropriation, to support community-identified priorities to enhance air-quality monitoring. This funding bolsters community efforts to monitor their air quality and to promote air-quality monitoring partnerships between communities and state, Tribal, and local governments. Monitoring air quality is a foundational step toward actions to address health outcome disparities from pollution and the COVID–19 pandemic.
- DOL's Office of the Assistant Secretary for Policy created an introductory toolkit to encourage participation in the rulemaking process and encourage more impacted individuals to voice their experiences and views during the rulemaking process.
- USDA established an equity commission in early 2022, charged with evaluating USDA programs and services and providing recommendations for reducing barriers to access. The diverse membership of this 15-member independent commission includes representatives from community-based organizations in underserved communities, professionals in policy design, evaluation, organizational development, design thinking, change management, communications/public relations, civil rights, organizational DEIA, social policy and economic disparities, history, and law.
- To inform the Federal Evidence Agenda on LGBTQI+ Equity (pursuant to Section 11(b) of EO 14075), the SED SOGI Data subgroup held a series of listening sessions with more than 50 individuals, organizations, data specialists, community advocates, and academics, representing a broad range of lived experience and issue-area expertise. These listening sessions covered topics such as nuanced information about the needs of LGBTQI+ people, current available research on this community, and privacy and confidentiality considerations. The SOGI subgroup's subject matter experts, including evaluation officers, chief data officers, and statistical officials worked to identify and discuss gaps in evidence needed to advance LGBTQI+ equity as well as identify potential federal datasets that could be used to answer the illustrative questions in the Federal Evidence Agenda on LGBTQI+ Equity. The SED SOGI Data subgroup's work was also informed by the experts in the working group itself, many of whom pair lived experience with substantive proficiency in SOGI measurement issues, data collection more broadly, policies and programs that serve LGBTQI+ individuals and families, and in-depth knowledge of this population.
- The SED Engagement and Accountability IWG's effort to gather input from the public through a formal request for information (RFI) in fall 2022 is a highlight of the SED's work to increase transparency in data collection and sharing for diverse populations. To maximize engagement, the RFI was promoted across various channels including the Federal Register, a blog post, email follow-up communication with organizations, and social media from OSTP, OMB, and other agencies. The RFI received nearly 170 responses, and the SED Engagement and Accountability IWG will publish the results of this outreach in a separate report aligned with the Fifth U.S. Open Government National Action Plan.

- In the first half of 2023, the SED Engagement and Accountability IWG is piloting a complete feedback loop for recommendations received from the public on how to improve specific datasets. The IWG will present these recommendations to federal agency data stewards, and then respond publicly to whether the agency can implement the recommendations and share any relevant barriers to doing so.

## Recommendation 5: Be Accountable to the American Public

Transparency and accountability are critical elements of any sustained federal government commitment to using data to drive more equitable outcomes. Generating disaggregated data about government progress is necessary but not sufficient; such data also need to be packaged so that civil society can make use of them. As indicated in the EDWG's April 2022 recommendations, the government has a responsibility to support data platforms and partnerships that enable the public to easily find meaningful data about the well-being of their communities and the services provided to them.

Public stakeholders consistently request better data and tools. They also lift up models that they have found useful to inform their policy advocacy and to align private sector efforts with those of government to meet the needs of underserved Americans. A few tools that stakeholders have held up as promising practices include the CDC's Environmental Justice Index and HUD's Public Housing Dashboard and Low-Income Housing Tax Credit dataset.

### Increase Transparency About Progress Toward Serving Underserved Populations

To better share progress and work remaining to meet the needs of underserved populations, member agencies have used a variety of approaches including training on how to use data tools and datasets with information specific to individual communities and population groups.

Examples:

- The VA is publishing a series of Data Stories to help the public understand study findings on veterans benefit recipients with data broken out by demographic characteristics. Topics include research on post-traumatic stress disorder (PTSD), veteran population projections with demographics, and the levels of use of VA benefits across different demographic groups.
- OSTP's U.S. Chief Data Scientist's team, with data scientists from the Presidential Innovation Fellowship and U.S. Digital Corps, collaborated with the White House Infrastructure Implementation Team and the Office of Clean Energy Innovation and Implementation to produce and publish structured data on programs in the BIL and Inflation Reduction Act.[10] Intermediaries that provide networking and technical assistance to local governments can use the program data to reduce barriers for lower capacity communities to finding relevant funding.
- The White House Infrastructure Implementation Team also publishes data on the location and basic attributes of announced BIL projects, which can offer public stakeholders the first opportunity to analyze what areas are receiving funding.

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[10] Downloadable data and data dictionaries are toward the bottom of the linked BIL and IRA pages.

## Build Data Access Tools that are User-friendly

To make it easier for the public to access and use data tools to further equitable data goals, SED member agencies have pursued several strategies including building new data tools, dashboards, and access platforms. In addition, agencies have updated existing tools to make them more user-friendly and customizable, and to incorporate disaggregated demographic variables.

A few highlights from member agencies efforts in the last 2 years are included below.

- In 2022, the EPA Office of Enforcement and Compliance Assurance released the Enforcement and Compliance History Online notification system (ECHO Notify), a web tool that empowers members of the public to stay informed about important environmental enforcement and compliance activities in their communities. With this tool, subscribers can receive automatic alerts to environmental enforcement and compliance activities in their area of interest. As of late 2022, ECHO Notify has served more than 1,400 public subscribers.
- Also in 2022, to improve accessibility of its collected earth science information, NASA began to transfer its environmental datasets to the cloud to make it easier for those with less computing power to access and use the data by avoiding the need to download and store files on individual devices. NASA also will develop open-source code in common formats to help researchers easily access and visualize their data on the platform.
- EPA has enhanced the use of its Toxics Release Inventory (TRI) data tool by creating the TRI Toxics Tracker explicitly for community-based users. The TRI Toxics Tracker allows users to map TRI facilities along with nine demographic indicators, including low income, education level less than high school, and children under the age of five. Users can conduct community-level analyses of toxic chemicals released into the environment from industrial facilities. The tool also allows facilities to indicate pollution prevention measures they have taken.
- In October 2022, BJS released the Law Enforcement Agency Reported Crime Analysis Tool with incident-level data from participating law enforcement agencies across the U.S. The tool gives users the ability to examine an expanded set of demographic characteristics of crime victims, alleged offenders, and persons arrested.
- The Department of Education's NCES has been taking steps to improve the availability of rural education data and resources. For example, the agency has developed a new resource hub, Education Across America. The website is designed for those interested in the condition of education in the country's diverse geography—its cities, suburbs, towns, and rural areas.
- The DHS Office of Immigration Statistics and U.S. Citizenship and Immigration Services developed a public dashboard that captures country of birth, state, and core-based statistical area (CBSA) on lawful permanent residents who have not filed a Form N-400, Application for Naturalization.
- The National Oceanic and Atmospheric Administration (NOAA) incorporated Census demographic data such as poverty, disability, and limited English proficiency into its Billion-Dollar Weather and Climate Disasters Mapping tool.
- DOE's Office of Economic Impact and Diversity created the Environmental Justice Dashboard (Beta) leveraging underutilized data from their integrated data warehouse to make more public and transparent where DOE funding and investments are going.

# Future Work

During the 2 years since the signing of EO 13985, agencies have made significant and demonstrable progress on equitable data goals. During the 9 months since the EDWG recommendations were released, agencies have doubled down on their equitable data ambitions, building on early successes, and charting a clear path forward.

As expected, the progress we have outlined in this report is foundational. Agencies have focused on building capacity through talent, technology, and policy, and have conducted research and pilot programs to guide future work. Agencies have also made great strides in building accessible data tools and platforms both for their internal use toward equitable data goals and for the public's use.

A strong foundation and framework are critical to a lasting structure. The work conducted over the last 2 years positions the SED's members to accelerate the delivery of more equitable outcomes in federal government programs and services in the next 2 years.

As with any effort at this scale, collaboration and knowledge sharing among colleagues are essential to converting the promise of a strong foundation into a sustainable reality. That is why the SED and its subgroup, the Equitable Data Community of Practice, which is open to any federal employee, are so vital. Interagency collaboration is an indispensable component in realizing the vision of federal programming that serves all Americans. Yet as large as the federal government is, federal agencies cannot do it alone. The SED and its executive department and agency partners will need continued input from communities and the expert guidance of colleagues at the state, Tribal, local, and territorial levels to shine a light on the nuances that can be difficult for us to see at a distance.

In addition, we need support to address resource and other constraints that may limit the ability of certain agencies to pursue equitable data ambitions in their statistical surveys and administrative forms.

Over the next 2 years, the SED will build on the progress to date to move toward the Vision for Equitable Data in collaboration with our partners inside and outside of government.

# Appendix

## Equitable Data Timeline January 2021 – February 2023

The timeline below details key milestones in the Biden-Harris Administration's equitable data agenda.

## 2021

- **January 20:** President Biden signs the [Executive Order on Advancing Racial Equity and Support of Underserved Communities Through the Federal Government](#) (EO 13985). Section 9 of EO 13985 requires establishing the Equitable Data Working Group (EDWG), and tasks the EDWG with creating a set of recommendations for equitable data in the federal government.
- **May 5:** The Office of Management and Budget (OMB) issues a [Request for Information](#) that solicits public input on available methods, approaches, and tools to equitably serve all eligible individuals and communities. More than a third of the responses addressed data collection.
- **July 27:** Dr. Alondra Nelson (White House Office of Science and Technology Policy) and Dr. Clarence Wardell (White House Domestic Policy Council) publish an [Update from the Equitable Data Working Group](#), describing the case study approach the EDWG decided to use to structure the working group's conversations.
- **Summer through April 2022:** Agency equity teams workshop case studies to inform equity action plans.

## 2022

- **First Quarter:** Agencies release their [equity action plans](#), describing their plans to meet the challenges laid out in EO 13985, often including infusing data into equity initiatives.
- **April:** The Chief Data Officers Council Data Sharing Working Group issues [Findings and Recommendations](#) from their investigation into data sharing needs and challenges across the federal government.
- **April 22:** The EDWG releases [A Vision for Equitable Data: Recommendations from the Equitable Data Working Group](#).
- **May 23:** The White House releases [Advancing Equity through the American Rescue Plan](#), a report that details the Biden-Harris Administration's whole-of-government approach to the equitable implementation of more than 200 programs and services in this federal stimulus package.
- **May 25:** The President signs [Executive Order on Advancing Effective, Accountable Policing and Criminal Justice Practices to Enhance Public Trust and Public Safety](#) (EO 14074). Section 18 requires the EDWG to establish an interagency working group on criminal justice statistics, and tasks that IWG with creating a report that assesses current data collection, use, and data transparency practices with respect to law enforcement activities.
- **June 15:** The President signs the [Executive Order on Advancing Equality for Lesbian, Gay, Bisexual, Transgender, Queer, and Intersex Individuals](#) (EO 14075). Section 11 requires the EDWG to establish an IWG on LGBTQI+ data, and tasks the IWG with creating a Federal Evidence Agenda on LGBTQI+ Equity.
- **June 15:** The Chief Statistician of the United States [announces](#) the initiation of a formal process to review and revise the Office of Management and Budget's Statistical Standard 15 (SPD 15):  Standards for Maintaining, Collecting, and Presenting Federal Data on Race and Ethnicity. SPD 15 provides minimum standards that ensure the ability to compare information

and data across federal agencies, and also to understand how well federal programs serve a diverse America.

- **July**: OMB disseminates guidance to promote broader understanding of the existing flexibilities and best practices for disaggregating race and ethnicity data under the current SPD 15 standards, in recognition that any revision to SPD 15 will take time to develop and implement across all federal agencies.
- **August 1**: The OSTP NSTC Subcommittee on Equitable Data (SED) is chartered as a part of the National Science and Technology Council and is tasked with implementing the recommendations in the EDWG's Vision for Equitable Data report.
- **August 24:** The SED SOGI Data Subcommittee issues a Request for Information, soliciting input from the public on how best to improve the federal government's ability to make data-informed policy decisions that advance equity for the LGBTQI+ community.
- **September 2:** The SED IWG on Engagement and Accountability issues a request for information on how federal agencies can better support collaborations with other levels of government, civil society, and the research community around the production and use of equitable data.
- **October through December:** OSTP, OMB, and GSA host engagement sessions and receive public comments in a co-creation process for the U.S. Open Government National Action Plan, with a focus on equity.
- **December 28:** Fifth U.S. Open Government National Action Plan is released, in accordance with the guidelines of the Open Government Partnership, with several references to equitable data.

## 2023

- **January 11**: The Office of the Chief Statistician releases Recommendations on the Best Practices for the Collection of Sexual Orientation and Gender Identity Data on Federal Statistical Surveys.
- **January 19**: The SED IWG on Sexual Orientation, Gender Identity, and Variation in Sex Characteristics (SOGI) Data releases Federal Evidence Agenda on LGBTQI+ Data.
- **January 24**: The SED launches the Equitable Data Community of Practice.
- **January 26:** The Office of the Chief Statistician releases an initial set of recommended revisions proposed by an interagency technical working group to revise OMB's statistical standards for collecting and reporting race and ethnicity data across federal agencies.
- **February 16:** President Biden signs Executive Order on Further Advancing Racial Equity and Support for Underserved Communities Through the Federal Government (EO 14091) requiring deeper adoption of equitable data practices across the federal government.