

Guidance for OPS Licensees on Preparing Annual Social Equity Evaluation Reports

Created January 25, 2024

Background

This document is intended to serve as a resource for Oregon Psilocybin Services (OPS) licensees who are required to provide documentation of the evaluation of their social equity plans ([Oregon Administrative Rule: 333-333-4020](#)).

Upon renewal of an OPS license, a licensee must submit a document that reports how their Social Equity Plan was implemented over the past year. We refer to this annual reporting document as the Annual Social Equity Evaluation Report.

The purpose of this requirement is to ensure that every licensee evaluates the implementation of goals they have prioritized in their Social Equity Plan. If an Annual Social Equity Evaluation Report does not sufficiently meet the administrative rule requirements, a licensee may be required to submit additional information. If a licensee fails to submit the appropriate information, a license may not be renewed.

Strategic Alignment with Oregon Health Authority Equity Goals

Oregon will have established a health system that creates health equity when all people can reach their full health potential and well-being and are not disadvantaged by their race, ethnicity, language, disability, age, gender, gender identity, sexual orientation, social class, intersections among these communities or identities, or other socially determined circumstances. OPS aligns with the Oregon Health Authority (OHA) strategic goal to eliminate health inequities in Oregon and with the [OHA Equity Advancement Plan](#).

OPS also works to advance the priorities of [Healthier Together Oregon](#)

[\(HTO\)](#), Oregon's State Health Improvement Plan. HTO was developed with over 100 people from 68 organizations, who worked together to identify the following five priority areas:

- Institutional Bias
- Adversity, Trauma, and Toxic Stress
- Behavioral Health
- Economic Drivers of Health
- Access to Equitable Preventative Health Care

Long-standing systemic health and social inequities have put some population groups at increased risk of avoidable, unjust, and unfair differences in health status and outcomes. Priority populations in the HTO include:

- Black, Indigenous, people of color, and American Indian/Alaska Native people (BIPOC-AI/AN)
- People with low-income
- People with disabilities
- People living in rural areas of the state
- People who identify as lesbian, gay, bisexual, transgender, queer, and questioning (LGBTQ+)
- Immigrants and refugees

In addition to these populations, OPS also prioritizes individuals who are veterans.

When this guidance document refers to “HTO priority populations”, we are referring to these populations.

Guidance for Annual Social Equity Evaluation Reports

There is no size or page requirement for the Annual Social Equity Evaluation Report. Licensees are encouraged to keep the information directly tied to the goals and objective performance measures already in their Social Equity Plan.

The Annual Social Equity Evaluation Report can include both qualitative and quantitative information to describe progress made in meeting Social

Equity Plan goals. Below is a table that provides some evaluation examples:

Example Goals	Example Actions	Example Objective Performance Measures	Example Quantitative Evaluation	Example Qualitative Evaluation
Increase workforce representation of HTO priority populations and veterans	Recruit and hire diverse employees that represent HTO priority populations and veterans	XX% or more of workforce identifies as a member of HTO priority population or are veterans	% as reported in an annual workforce survey	Feedback provided in annual workforce survey about current workforce representation and retention practices
Workforce training	Require and pay for employees and contractors to attend equity-centered training	# of hours devoted to equity-centered training and % of employees and contractors who attended	# of hours documented through training registration and % of employees and contractors who attended	Name and description of training(s), key take-aways, how training will be applied to business policies and practices
Financially support licensees of HTO priority populations and veteran licensees	Support a licensee who identifies as a member of HTO priority populations by sponsoring their licensing fee	X% of licensing fee sponsored for X# of licensee applicants of HTO priority populations, including veterans	X in sponsorship dollars provided and documented through transaction to recipient	Description of sponsorship; how recipient was selected and benefited, etc.
Mentorship of HTO priority populations and veterans	Provide mentorship for a prospective licensee who identifies as a member of HTO	Meet with an individual X times to provide mentorship	# of meetings	Describe what you have learned from the meetings, describe specific topics

	priority populations, including veterans, through culturally-responsive, harm reduction lens			you have mentored on, describe areas of growth for yourself as a mentor
Financial assistance for HTO priority populations and veterans	Provide reduced rates for clients of HTO priority populations	Clients who accessed services at a reduced rate	# of total clients who benefited from assistance Average reduced rate: \$X for an administration session	Describe challenges and opportunities identified

Please keep in mind that the information listed in the table above is only provided to give examples. Licensees should evaluate and report on the goals and objective performance measures prioritized in their specific Social Equity Plan.

If progress was not made in the past year, licensees should describe reasons, lessons learned, and adjustments they have made to their Social Equity Plan for their renewal application.

Updating Social Equity Plans

The [OPS Social Equity Plan Guidance and Resources](#) document provides more information on creating Social Equity Plans that meet OPS requirements. In addition to submitting an Annual Social Equity Evaluation Report at the time of license renewal, licensees must also submit their current Social Equity Plan.

If a licensee decides to update their social equity plan, they must submit a copy of the updated social equity plan as part of their license renewal application package. At any other time, licensees must provide written notice of any material changes they make to their Social Equity Plan within 60 days of making that change.