

Oregon Psilocybin Services Social Equity Plan Resources

Background

This document is intended to serve as a resource for manufacturer, service center, facilitator and laboratory license applicants, who are required by [Oregon Administrative Rule \(OAR 333-333-4020\)](#) to submit a Social Equity Plan (SEP) as part of their license application with Oregon Psilocybin Services (OPS).

The purpose of the SEP requirement is to ensure that every psilocybin licensee in Oregon considers how certain communities have been disproportionately harmed by systemic inequities and how they propose to address these inequities in their business practices. The SEP is an opportunity for license applicants to state specific commitments to social equity and how those commitments will be integrated into business operations.

This document includes an overview of the SEP requirements in administrative rules, an explanation of the process for developing the content in this document, some general guidance for what to include in a SEP, and a selection of resources that can be helpful to applicants as they craft their first SEP.

Social Equity Plans in Administrative Rules

Oregon Administrative Rule (OAR 333-333-4020) states that social equity plans must include a description of the following:

- (a) Application of diversity, equity, justice and inclusion principles to the licensee's internal practices and policies.
- (b) Objective performance measures that the licensee will use to evaluate their social equity plan.

As a part of the license renewal process, all license applicants must provide documentation of the evaluation of their social equity plans based on the objective performance measures identified in their social equity plans.

Licensees must provide written notice of any material changes to their social equity plan within 60 days of making the change.

If a facilitator is an employee of a licensed service center, the social equity plan requirements can be fulfilled by submitting a statement to the Authority that references the service center's social equity plan. If a facilitator is an employee of more than one service center, the statement must identify each service center that employs the facilitator. If a facilitator contracts with a service center, they must submit their own social equity plan.

Process for developing this document

The Oregon Psilocybin Services (OPS) team has been working with community partners across Oregon to identify options for addressing equity in the implementation of the Oregon Psilocybin Services Act. OPS has also met with leaders implementing equity initiatives in the cannabis sector in California to understand lessons learned. OPS has scanned research and other publications to better understand social equity policies and programs within the cannabis sector.

The Oregon Psilocybin Advisory Board (OPAB) approved the Equity Subcommittee's recommendation that OHA require SEPs as a condition of licensure (See [OPAB Recommendations, pages 4 and 41-42](#)). This recommendation was adopted in final administrative rules. During the November 2022 rulemaking public comment period, OPS received requests for information or resources for the SEP requirement. OPS also received feedback that creating too complex of a requirement could be counterproductive to advancing social equity, as it may become overly burdensome, time-consuming or lead applicants to pay consultants for additional planning expertise.

Drawing from research, recommendations and community input, OPS drafted this document to provide more information and resources for license applicants. This document was reviewed by the Oregon Health Authority Public Health Division's Equity Team. OPS expects that this document will evolve over time, as we collectively learn more about effective social equity plans and identify new resources.

General Guidance

There is no size or page requirement for SEPs and applicants are encouraged to keep SEPs clear and actionable. Based on a review of SEPs in the cannabis sector and other social equity planning resources, components of an applicant's Social Equity Plan might include:

- Statements of commitments
- Description of business practices, policies and programming
- Goals for measuring and achieving diversity in ownership, management, and employment
- Descriptions of any workforce training and investments in justice, equity, diversity and inclusion work
- Neighborhood characteristics of area where the applicant intends to operate and any plans of partnership with, or assistance to, community organizations or residents
- How the applicant will align to help advance equity and justice priorities already identified by the local community
- Descriptions of any outreach, mentoring, training, or professional development that will be offered to diverse groups
- How the applicant will support other licensees who identify as BIPOC, LGBTQIA2S+, or other [priority populations](#)
- Acknowledgement of challenges and opportunities
- Descriptions of how applicant plans to meet social equity goals in daily operations
- Descriptions of how applicant plans to track and share progress

Please note that SEPs are not required to include all of these components. The list above provides examples of what could be included. Applicants may also have other components of an SEP that are not listed here.

Resources for Social Equity Planning

Below is a selection of resources that OPS license applicants may find useful in developing social equity plans.

[Medical Cannabis Dispensary Social Equity Plans](#)

San Francisco Office of Cannabis

This page provides the content of 40 different social equity plans submitted by medical cannabis dispensaries to the City of San Francisco's Office of Cannabis.

[Cannabis Licensees with Published Social Equity Plans](#)

Michigan Cannabis Regulatory Agency

This page provides links to over 60 different social equity plans submitted by businesses licensed under the Michigan Cannabis Regulatory Agency.

[SMARTIE Goals Worksheet](#)

The Management Center

The SMARTIE (Strategic, Measurable, Ambitious, Realistic, Time-bound, Inclusive, and Equitable) Goals Worksheet helps incorporate equity and inclusion components into organizational goals. The worksheet template can be adapted to different organizations and is available to download as a Google document, Word document, and in both English and Spanish. There are also many other tools available on The Management Center's [Equity and Inclusion main page](#).

[Equity and Empowerment Lens](#)

Multnomah County Office of Diversity and Equity

The Equity and Empowerment Lens is a quality improvement tool used to improve planning, decision-making and resource allocation leading to more racially equitable policies and programs. It includes a logic model tool that looks at transformative change at the individual, institutional, and systemic levels, and a 5P's Worksheet tool that asks major questions in the areas of people, place, process, power and purpose.

[Race, Equity, Justice Initiative \(REJI\) Organizational Toolkit & Guides](#)

JustLead Washington

This toolkit is designed to help organizations understand and incorporate racial equity into their work. Among its tools and resources, the toolkit provides an assessment tool that organizations can use to assess and advance their practices, policies, and culture to operationalize racial equity and support the development of organizational equity plans.

[Cannabis Equity in California](#)

California Department of Cannabis Control

This page offers some general information about the effects of cannabis criminalization and the challenges of entering the cannabis industry in California. It spotlights some local equity promising practices.

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