



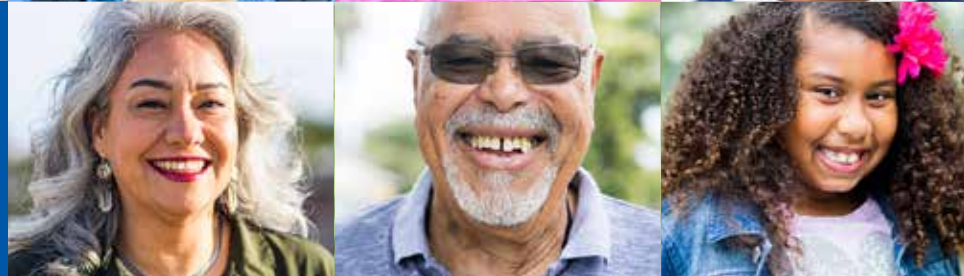
# **STRENGTHENING OUR EQUITY MUSCLE TO ACCELERATE IMPACT THE UNITED WAY EQUITY FRAMEWORK**







**A focus on diversity, equity, and inclusion  
*in all aspects of our work* is essential to  
the continued relevance of United Way  
as a partner of choice.**

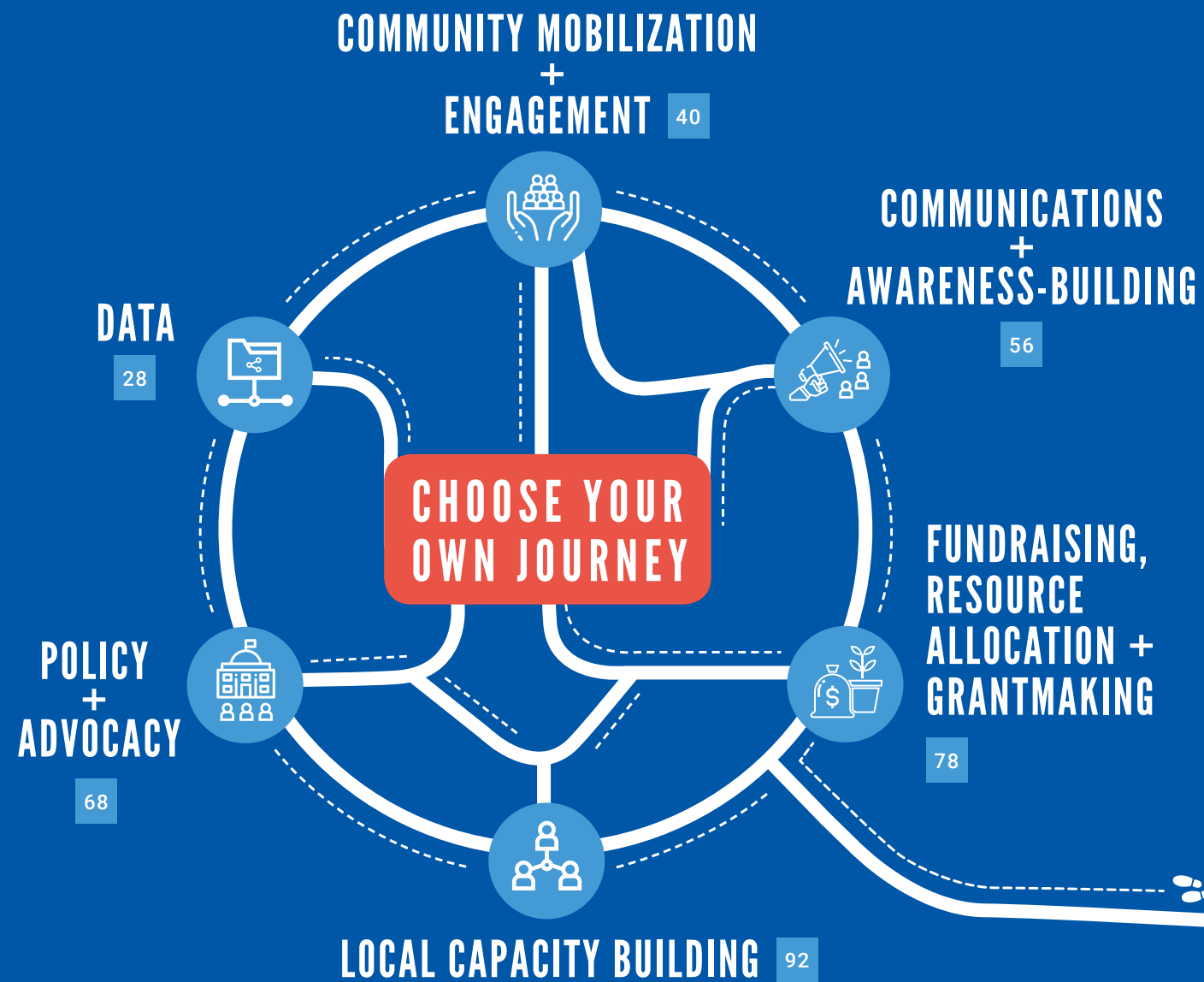


**We must be a leader in the  
fight for equity and strive to  
create communities where  
everyone has the resources,  
opportunities, and support  
they need to thrive.**





# THE 6 EQUITY LEVERS FOR SUCCESS



(Levers Overview Descriptions on page 11)

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# FOREWARD

Dear United Way Colleagues,

I am pleased to share United Way's Equity Framework! This Framework is a resource to help United Ways in the U.S. to identify, develop and implement impact strategies, practices, processes and messaging to drive equitable community change.

Our mission is to mobilize the caring power of communities to advance the common good. We envision inclusive, resilient and equitable communities. We engage donors, advocates, volunteers and partners to join us in fighting to ensure that every person in every community has access to a quality education, including the knowledge, skills and training they need to attain jobs that pay good wages, and the ability to live a healthy life.

For too many individuals and families, access to a better life remains elusive. To achieve our vision, we must understand and address the underlying factors that impede progress. By challenging practices based on racism, sexism, and other historical and current forms of discrimination, we can create more inclusive communities and equitable outcomes. We must be a leader in the fight for equity and strive to create communities where everyone has the resources, opportunities, and support they need to thrive.

This Equity Framework is best used in conjunction with the Equity Toolkit (Living United: A Guide for Becoming a More Equitable Organization toolkit focused on "getting your house in order"). The Equity Toolkit focuses on United Way as the unit of change, and the Equity Framework focuses on the community as the unit of change. The Framework is focused on your work externally with community residents and partners to create more equitable communities.

The Framework and the Toolkit are both overarching critical success factors of our Blueprint for a Modern United Way. It is important to embody the principles of diversity, equity, and inclusion in our internal organizational practices. A Modern United Way must also work to engage community residents, particularly those who have been historically marginalized. By working with residents, we can identify and understand persistent, systemic inequities to create impact solutions that help advance inclusive growth and opportunity. This emphasis reflects the understanding that a focus on diversity, equity, and inclusion in all aspects of our work is essential to the continued relevance of United Way as a partner of choice. It is imperative that our work addresses the most critical, pressing issues within and across communities in the United States.

We are proud of United Ways who are trailblazers in this work. They remind us that we can always make a difference and be more equitable in engaging with the community, diversifying our boards and staff, and improving vendor procurement. We are especially grateful to the United Ways who contributed to the development of this framework. Many of their stories are highlighted throughout the tool.

As our U.S. network embraces an explicit equity lens and understands its impact on our work, we are here to support you in your efforts to lead in new ways. We only succeed when the communities we serve, and our overall society succeeds.



Yours in equity and inclusion,  
Suzanne McCormick  
U.S. President, United Way Worldwide



## United Way Worldwide Equity Work

**Modern United Way**  
Model Diversity, Equity and Inclusion

### Creating Equitable UW Organizations

**Goal** - Help United Ways become more diverse, inclusive, and equitable organizations so that they are more credible addressing these same issues in the community.

**Key Products** - Equity Toolkit, Annual Summit, Learning & Tools

### Creating More Equitable Communities

**Goal** - Leverage expertise within and outside United Way to provide the strategies, best practice examples, and success measures to help United Ways create more equitable communities and close disparities wherever they exist.

**Key Products** - Equity Framework, Integrating Equity into Impact Approach & Common Measures (GRF), Resources & Tools



### Strengthening the Capacity of Local Leaders

**Goal** - Deepen Board member understanding of community issues and data. Increase leadership capacity to advance equitable community change.

**Key Product** - EY Board Development Learning Series



Impact Team

Talent & Development

Diversity, Equity, and Inclusion Team





# GETTING STARTED: HOW TO USE THIS FRAMEWORK

**U**nited Way Worldwide is committed to cultivating leadership throughout our network necessary to create more equitable organizations. This includes developing learning opportunities, trainings, resources, and tools to support these efforts. This commitment is reflected in the Equity Toolkit that is specifically designed to support United Way leaders (CEOs, board members, senior staff) to implement equitable policies and practices in their organizations, so that increased capacity exists to address these issues in the communities we serve.

This Equity Framework complements the Equity Toolkit and is focused on helping United Ways in the U.S. drive equitable community change. In short, the Toolkit focuses on United Ways (as organizations) as the unit of change; the Equity Framework is focused on the community as the unit of change. This Equity Framework is intended for use in the United States and is designed to support United Way leaders and staff, especially Impact, Policy and Advocacy, Resource Development, and Marketing and Communications Teams to explicitly address equity as a process and a result of their work. It draws upon past historical developments and the present-day context in the U.S. Although some of the concepts may be universal (e.g. racism), how they play out varies tremendously between countries, based on their unique historical, social, cultural, racial/ethnic, and economic circumstances. While this framework is inclusive of all forms of inequities, it prioritizes identifying and addressing racial inequities, given the pervasive and lasting impact that systemic, structural, and institutional racism has played and continues to play in every facet of American life and the lasting consequences for white people and for people of color.

## ACKNOWLEDGING WORD CHOICE

The words we use matter. We've made some choices in this document that reflect the desire to be inclusive and to respect how different groups of people wish to be identified (e.g. American Indian v. Native American). Throughout the framework, in addition to race, we explicitly name ethnicity, gender, sexual orientation, income level, and ability status since they reflect the basis on which the majority of past and current discrimination and unequal treatment in the United States is based, resulting in the types of persistent inequities that your United Way and community is most likely to be addressing. We recognize that your communities likely have other constituencies or issues that are not explicitly listed. However, many of the strategies, suggested activities, and resources and tools included can be adapted to your local context and needs.



This Equity Framework complements the Equity Toolkit and focuses on helping United Ways in the U.S. drive equitable community change. In short, the Toolkit focuses on United Ways (as organizations) as the unit of change, while the Equity Framework focuses on the community as the unit of change.





This framework supports your local United Way in identifying, developing and implementing impact strategies, practices, processes, and messaging that drive more equitable outcomes in your community. While this framework focuses on your work externally, actively working to become a more equitable, diverse, and inclusive organization is critical for driving community impact. As such, this framework is best used in conjunction with **Living United: A Guide for Becoming a More Equitable Organization toolkit** which focuses on “getting your house in order.”

- THIS FRAMEWORK HAS FOUR PRIMARY COMPONENTS:
- Introduction
  - Shared Definition and Vision of Equity
  - Equity Levers
  - Appendices - Organizational Assessment, Selected Tools and Resources, Glossary, and Acknowledgements

INTRODUCTION

This section provides an overview of why United Way is increasing our intentional focus on equity and how it is integral to the organizational mission and vision for a Modern United Way. It highlights our existing approach to impact as a starting point for explicitly focusing on equity and identifies some of the challenges related to this. This section also includes key data and talking points that underscore the urgency and timeliness of focusing on equity that you may find useful in your local advocacy and concludes by identifying some of the core constituencies that United Ways need to engage in our equity work.



EQUITY LEVERS – ACCELERATING YOUR EQUITY EFFORTS

This section is modular and designed for you to move easily between the equity levers. Although the concepts and ideas overlap and reinforce each other, each lever is written so that you can go directly to the levers that are of the highest priority and interest to your United Way based on your local context.


- THE STRUCTURE OF EACH LEVER IS THE SAME. EACH LEVER INCLUDES:
- A rationale for why this lever is important for advancing equity.
  - A mini-assessment of indicators your United Way can use to assess your current progress on the specific dimension of equity.
  - A list of the specific critical success factor(s) in the Modern United Way that relates most to the lever.
  - Suggested strategies for United Ways to advance equity within this lever. Most of the indicators in the mini-assessment align with the strategy section, so the results of your assessment can be used to identify strategic priorities and/or quick wins.
  - Accelerated strategies. Each lever offers several strategies for accelerating your work that you may find especially relevant if your United Way has been focusing on equity for some time and is looking for ways to deepen or strengthen your efforts.
  - United Way Examples. Each lever will provide anecdotes of how local United Ways are currently implementing the specific equity lever.
  - Sample activities in Childhood and Youth Success, Economic Mobility and Health.
  - Sample measures of success.
  - Action-steps and space for you to include the next steps your United Way can take to advance equity.
  - A Featured Resource.

APPENDICES

The Appendices include a Discussion Guide, Glossary of Terms, Selected Tools and Resources for each Equity Lever, and Acknowledgements - including the list of Equity Advisory Committee Members. The Appendices also include the Baseline Organizational Assessment (entire document) for your United Way to assess where your organization is currently in terms of explicitly integrating equity as a process and outcome in your work in the community. These same indicators are also included in each equity lever. This gives your United Way the option to assess your progress within a particular equity lever, or to complete the assessment in its entirety using the full document at the end. Your United Way can use the areas of strength and challenge that you identify in each part of the assessment to determine specific strategies and action steps that you might take. You are strongly encouraged to complete the assessment again over time to track your progress.

THE 6 EQUITY LEVERS ARE AS FOLLOWS


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DATA

This lever focuses on how United Ways can advance equity by effectively collecting, analyzing, and sharing data. This includes (but is not limited to) using data to better understand community demographics, needs, disparities, donor characteristics, as well as how data can help create narratives that mobilize communities towards action.


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COMMUNITY MOBILIZATION + ENGAGEMENT

This lever focuses on how United Ways can prioritize equity to strengthen community engagement and mobilization strategies.


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COMMUNICATIONS + AWARENESS-BUILDING

This lever focuses on how United Ways can leverage effective communications and messaging to help diverse community residents, partners, funders, and other key constituents develop a deeper understanding of equity issues.


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POLICY + ADVOCACY

This lever focuses on how United Ways can advance equity through concerted policy and advocacy efforts, especially at the local and state levels.


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FUNDRAISING, RESOURCE ALLOCATION + GRANTMAKING

This lever focuses on how United Ways can advance equity through fundraising, grantmaking, and resource allocation.

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LOCAL CAPACITY BUILDING

This lever focuses on the role of local United Ways in creating a shared point of view regarding prioritizing equity in our work and working with partners to grow capacity and skills to advance equity.

Getting Started: How To Use This Framework

11



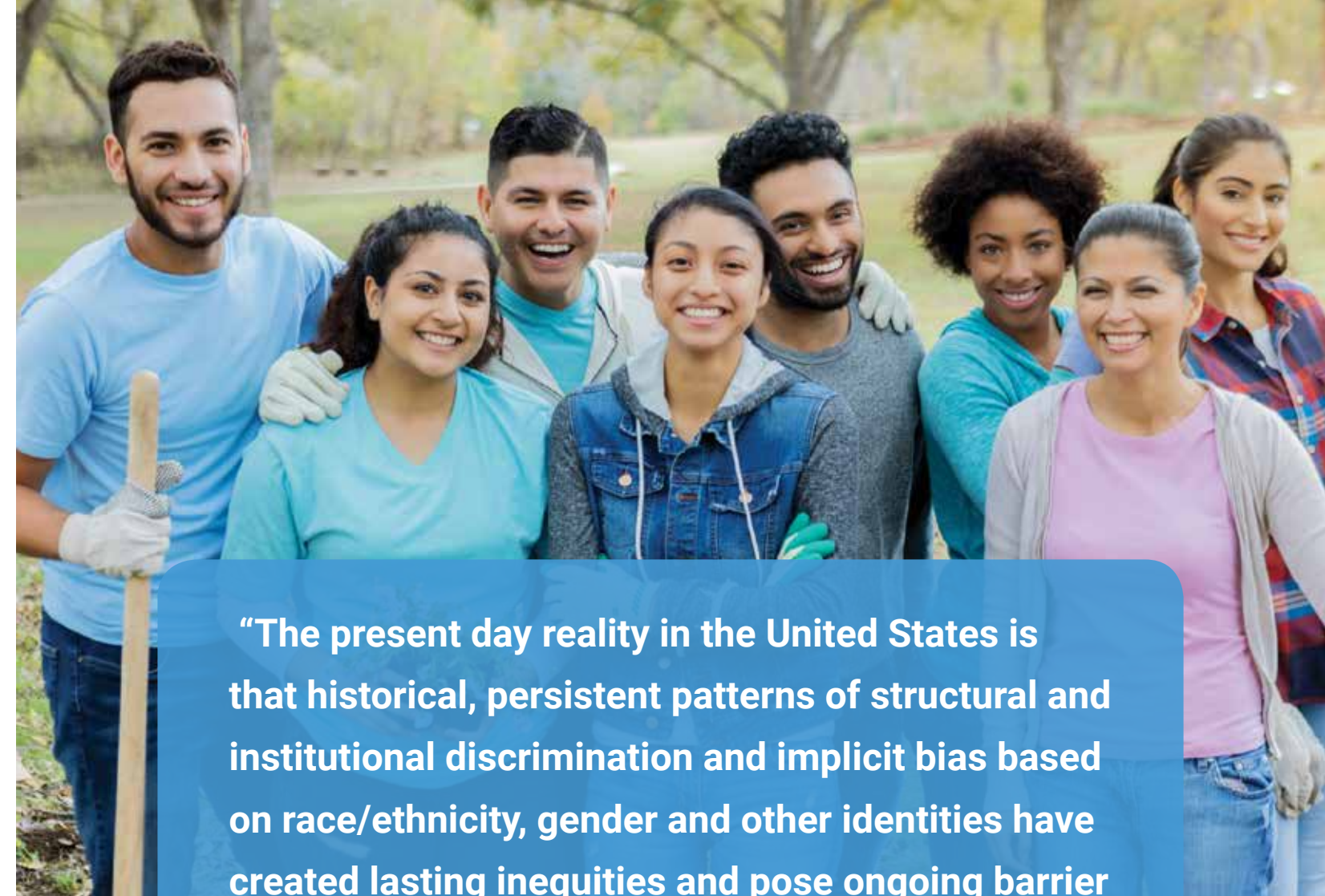
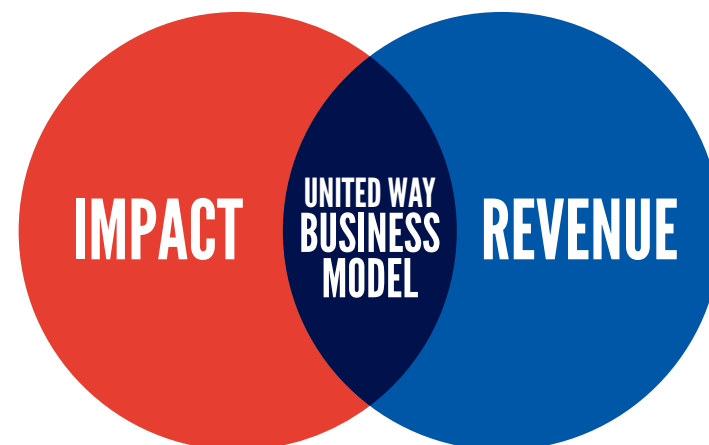
# INTRODUCTION

## EQUITY AS A CORE PRINCIPLE IN THE MODERN UNITED WAY

**U**nited Way is a global nonprofit organization that seeks to improve lives for every individual in every community. United Ways work to accomplish this by engaging community residents, partners, the business community, local government and other key constituencies to ensure that all community members have access to a high-quality education, access to jobs with good wages, and the ability to live a healthy life. The business model is how United Ways raise revenue to deliver impact in the communities we serve. At the heart of the business model is an understanding that the core work of United Ways is to deliver positive community change and that the donor is the customer. United Ways that can successfully raise revenue and deliver community impact are those that are (1) donor-centered (i.e. know who their existing and potential donors are, the issues and causes their donors care about, and what motivates them to give); (2) know how to best reach existing and potential donors and provide them meaningful opportunities to engage in our work; (3) and have a clearly defined **community impact agenda**. The community impact agenda should consist primarily of a set of goals, strategies, and priorities that were developed by engaging community residents, investors, and partners. The agenda should continuously be updated to reflect the evolving needs and challenges of the community and framed as an opportunity for donors to invest.

In our recent history and transition to community impact, United Way's work has focused on providing equitable opportunities for all. We have stressed deepening community engagement that is representative and inclusive of all residents as instrumental in ensuring that our work in education, economic mobility, and health is focused on shared community priorities. Although United Way's work in education, income, and health has often implicitly addressed inequity, primarily by focusing resources on historically marginalized populations, creating more equitable communities was not an explicit strategic goal. Within United Way, our institutional focus has traditionally centered on increasing diversity and inclusive practices rather than creating more equitable organizations.

The present-day reality in the United States is that historical, persistent patterns of structural and institutional discrimination and implicit bias based on race/ethnicity, gender, and other identities have created lasting inequities and pose ongoing barriers to enabling all to live the "good life." United Way recognizes that improving the lives of everyone in the communities we serve means we must **explicitly** focus on removing these barriers for those most harmed by them. This includes addressing systems, policies, practices, belief systems, and attitudes that have often served to privilege some and disenfranchise others. It is only through an intentional focus on removing these barriers that we can aspire to create the conditions that allow everyone the opportunity to thrive.



**“The present day reality in the United States is that historical, persistent patterns of structural and institutional discrimination and implicit bias based on race/ethnicity, gender and other identities have created lasting inequities and pose ongoing barrier to enabling all to live the “good life.”**

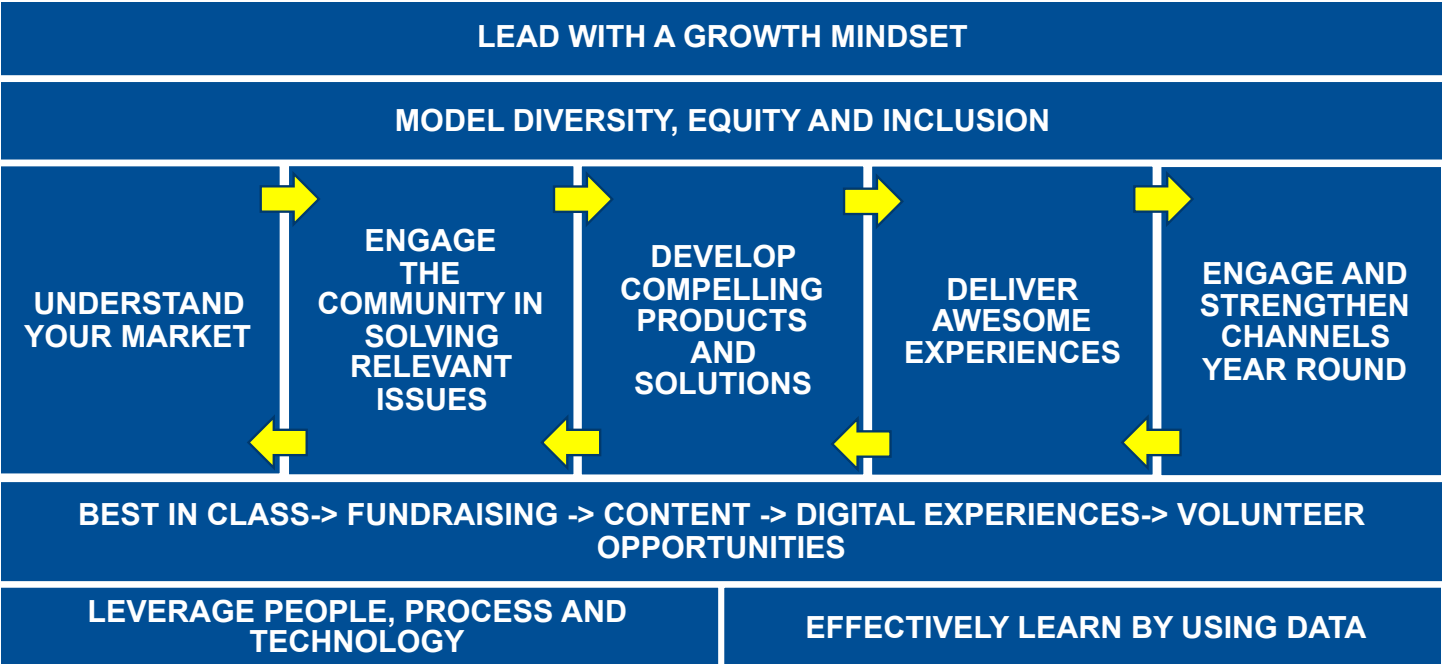






Equity is also an underlying principle in all of the other critical success factors included in the Modern United Way. This emphasis reflects the understanding that a focus on equity in all aspects of our work is essential to the continued relevance of United Way as a partner of choice to address the most critical pressing issues within and across communities in the United States.

### The Modern United Way



The Modern United Way represents how our network must evolve in response to fundamental shifts related to technology, globalization, the workplace, and increasing racial and ethnic diversity in the U.S. The Modern United Way articulates the set of critical organizational practices and mindsets necessary to ensure United Ways maintain their relevance, deliver community impact, and generate revenue. Modeling diversity, equity and inclusion is a priority, overarching critical success factor in the **Modern United Way**. United Way recognizes that it is important to embody the principle of equity in our internal organizational practices. United Way can effectively deliver on our mission only by intentionally advancing equity inside our organizations and out in the community by creating an environment where all people feel supported, listened to, and empowered.

Equity is also an underlying principle in **all of the other critical success factors** included in the Modern United Way. This emphasis reflects the understanding that a focus on equity in all aspects of our work is essential to the continued relevance of United Way as a partner of choice to address the most critical pressing issues within and across communities in the United States. Focusing on equity, by intentionally addressing racial and other disparities will ensure that United Ways can more effectively fight for the health, education and economic mobility of every person in every community. In practice, this means a Modern United Way engages community residents, particularly those who have been historically marginalized, to identify and understand persistent, systemic inequities and to create impact solutions that help advance inclusive growth and opportunity for all.





# UNITED WAY'S IMPACT GOALS AND APPROACH

United Way's impact work focuses on advancing education, economic mobility, and health as a means of ensuring that community residents can live a "good life." Our common approach has been to engage sectors to work together to come up with holistic, integrated solutions that reflect the complexity of how the issues of education, economic mobility, and health interact to shape individual lives and community conditions. At the national level, United Way has established 2028 Goals in education, economic mobility, and health intended for local customization, to help frame the priority issues of greatest concern and center community engagement as a way to help address these challenges.



## 2028 U.S. GOALS

5 MILLION PEOPLE WILL GET BETTER JOBS

95 PERCENT OF STUDENTS WILL GRADUATE HIGH SCHOOL READY FOR COLLEGE AND CAREER

90 PERCENT OF PEOPLE ARE HEALTHIER

Change lives, build stronger communities and mobilize resources







Specific goals and related strategies advanced by individual United Ways reflect local needs, priorities, capacity, and public will. Whatever the specific community impact priorities, equity has often been an embedded principle in how many United Ways have approached their impact work. This is especially true in relation to the process of developing impact priorities (see diagram above)

### COLLECT AND ANALYZE DIVERSE DATA

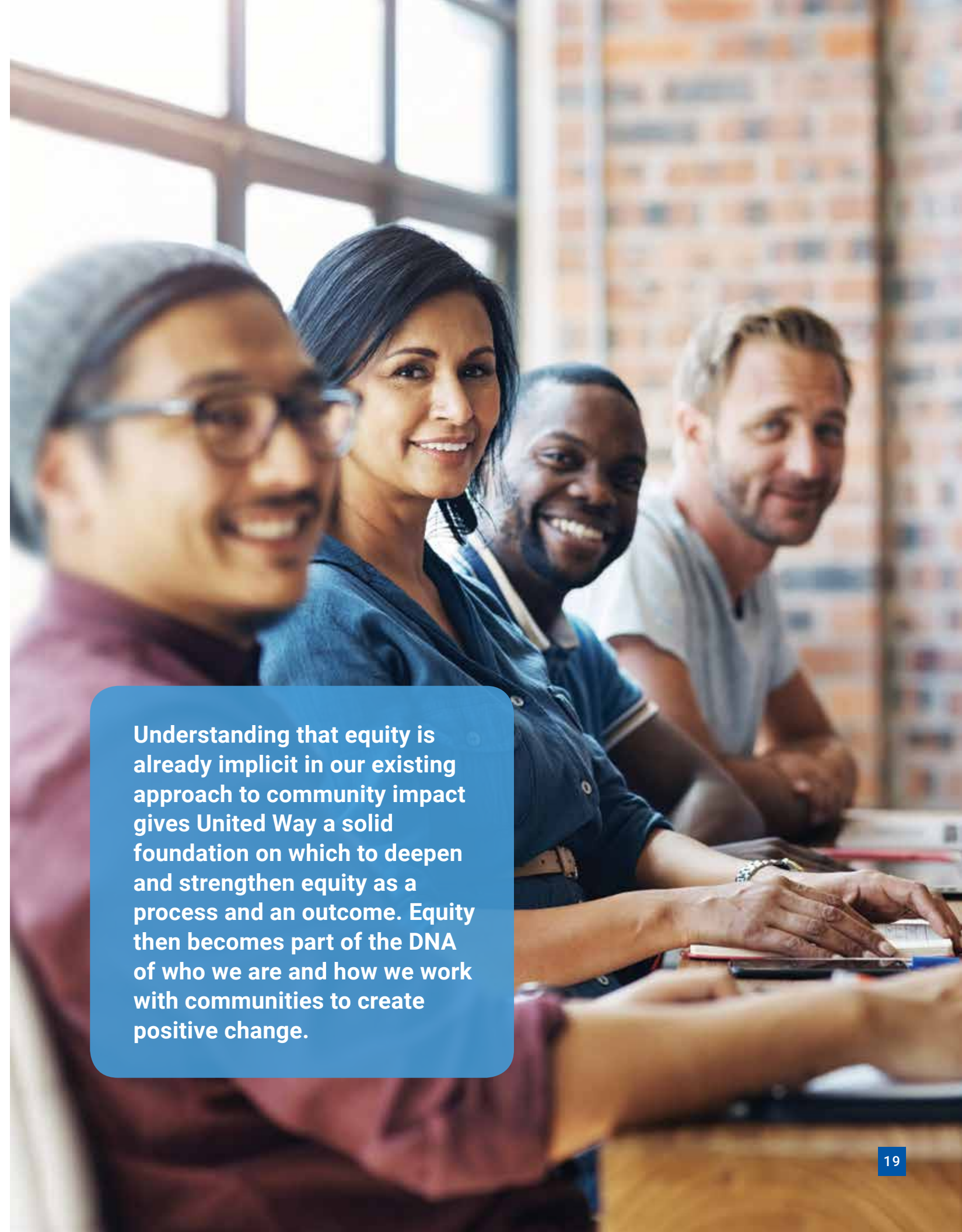
At the outset of refining or developing priority issues United Ways usually collect and analyze diverse data. For many United Ways, this includes collecting disaggregated data that shows the prevalence and scope of an issue (e.g. access to nutritious foods, reading proficiency, employment) and its impact on community residents based on SES, race/ethnicity, gender, or other identities. United Ways that are intentionally analyzing the data to identify gaps (especially those borne out of historic and systemic patterns of discrimination), to understand what entities are already addressing the issue (including community-based nonprofits that might already be serving traditionally under-served residents), and to consider how different constituents might have a vested interest in working on the issue, are already employing an equity lens.

### LISTEN TO COMMUNITY RESIDENTS

While aggregated data helps United Ways understand the scope of an issue, listening to community residents presents an opportunity to understand how those issues play out in the lives of specific individuals. United Ways that intentionally engage the voices of historically marginalized community residents, who might be deeply impacted by issues but left out of decision-making, are integrating equity in the process of developing an impact agenda.

### IDENTIFY PRIORITY ISSUES

United Ways take the information gathered (data and input from community residents, donors, and organizations) to identify priority issues. What United Ways prioritize is most often a reflection of multiple factors including, what donors and community residents care about and will devote resources to, United Way leadership commitment and organizational capacity (ability to fundraise to support), and what your United Way can make a meaningful difference on. United Way's priorities are a signal to community residents and other constituents about what matters most. United Ways whose priorities (and related strategies) reflect, at least in part, the intent to close persistent gaps and disparities, to ensure a more equitable distribution of opportunities and resources, and who employ strategies that go beyond direct services to address the root causes of inequality are embedding equity in the work.



**Understanding that equity is already implicit in our existing approach to community impact gives United Way a solid foundation on which to deepen and strengthen equity as a process and an outcome. Equity then becomes part of the DNA of who we are and how we work with communities to create positive change.**



## WHY CREATE AN EQUITY FRAMEWORK?

Understanding that equity is already implicit in our existing approach to community impact gives United Way a solid foundation on which to deepen and strengthen equity as a process and an outcome. Equity then becomes part of the DNA of who we are and how we work with communities to create positive change. However, making equity an explicit part of our impact efforts is the task before us, and will require grappling with key aspects of how we work.

### SOME OF THESE CHALLENGES INCLUDE...

Maintaining universal goals (e.g. improve early grade reading rates for all students in the community) to be inclusive of everyone, while explicitly integrating goals focused on closing existing gaps and disparities (e.g. close the gaps in reading proficiency between white/Asian students and African American/Hispanic students by ten percentage points)

Balancing direct services that touch the lives of individuals and can alleviate the effects of discrimination, lack of opportunity with systemic approaches that address the root cause (e.g. implementing programs that help low-income families manage their finances and advocating for wage increases, especially in employment sectors that disproportionately employ low-income of color)

Engaging new donors of color who are more likely to support United Ways that are working on the issues relevant to their communities, while maintaining donors who may not prioritize, or even understand the need to advance equity

Creating or increasing awareness in communities that may not be comfortable talking about race, gender and/or class, or know how to engage on these issues



Understanding that equity is already implicit in our existing approach to community impact gives United Way a solid foundation on which to deepen and strengthen equity as a process and an outcome. Equity then becomes part of the DNA of who we are and how we work with communities to create positive change.





# GROUNDING OUR EQUITY WORK: U.S. RACIAL DISPARITIES

The case for intentionally focusing on equity becomes clear when we examine the persistent disparities present in every aspect of social and economic well-being in the United States. Although disparities and inequities exist based on multiple dimensions, including race/ethnicity, gender, ability status, and income- the data show that the most enduring, pervasive, and intractable disparities are those based on historical patterns of structural and institutional oppression and discrimination based on race. Many current disparities in economic mobility, education, and health owe their origins to intentional policies and practices, undergirded by a belief system of inequality.

## A FEW KEY DATA POINTS TO HELP ILLUSTRATE THE CASE:

### ECONOMIC MOBILITY

The ability of Americans to improve themselves and their families' economic condition, in other words, to access the American dream, is highly correlated with racism and patterns of discrimination, that constrain opportunities and limit choices for some and create privilege for others.

#### Net Worth

The net worth of the average white household in the United States is 13 times that of the average African American family. Given that a home is typically a family's greatest single asset and accounts for a significant portion of overall wealth, the legacy of discrimination in housing and lending in the U.S. are major contributors to this disparity.<sup>1</sup>

#### Poverty

21 percent of African Americans and 18 percent of Hispanic Americans live below the poverty line, in contrast to 10 percent of white and Asian Americans.<sup>2</sup>

#### Household Income

Median household income is \$87,194 for Asian Americans and for \$70,642 for whites in contrast to \$41,361 for African American and \$51,450 for Hispanic households.<sup>3</sup>



### EDUCATIONAL ACHIEVEMENT AND ATTAINMENT

At every key milestone, from cradle to career, significant gaps persist and remain strongly correlated with race. On average, white and Asian Americans have greater access to educational resources (e.g. early childhood programs, quality K-12 schools, enrichment opportunities) and experience stronger outcomes (reading proficiency, high school, and college graduation) than their American Indian, African American, and Hispanic counterparts:

#### Reading Proficiency

18 percent of African American, 19 percent of American Indian, and 23 of Hispanic 4th grade students are proficient or above in reading, in contrast to 45 percent of white and 57 percent of Asian American 4th grade students.<sup>4</sup>

#### Youth Disconnection

18 percent of African American, 13 percent of Hispanic, and 30 percent of American Indian youth, ages 16-24 are neither in school or working, in contrast to 7 percent Asian Americans and 9 percent of white youth. Although numbers have improved over time for Hispanic youth, disconnection rates have worsened for African American youth.<sup>5</sup>

#### Post-Secondary Education

68 percent of Asian Americans and 54 percent of whites have some form of post-secondary degree; in contrast only 33 percent of African Americans, 27 percent of Hispanics and 27 percent of American Indians have attained the same level of education.<sup>6</sup>

### HEALTHCARE ACCESS AND OUTCOMES

Gaps in access to quality healthcare and disparities in health outcomes also correlate with historical and current unequal treatment based on race. African Americans and Hispanics are more likely to experience chronic health conditions, to live in communities that are unhealthy, and to lack adequate health insurance. These gaps have their origins, in part, to patterns of access to health services that are correlated with place of residence, a lack of affordability, and patterns of differential treatment of patients based on race, resulting in a legacy of distrust of the medical profession.

#### Healthcare Insurance

11 percent of African Americans and 16 percent of Hispanics are uninsured, in contrast to 6 percent of whites and 7 percent of Asian Americans.<sup>7</sup>

#### Obesity

Although obesity is a widespread issue in the U.S., with 4 in 10 American adults considered obese, significant disparities exist: 47 percent of African Americans and Hispanics are considered obese; in contrast to 38 percent of whites and 13 percent of Asian Americans.<sup>8</sup>

#### Maternal Mortality

African American mothers are 3.3 times, and American Indian mothers 2.5 times more likely than white mothers to die from pregnancy-related complications. Children born to African American and American Indian mothers are also significantly more likely to die before their 1st birthday than those born to white, Hispanic or Asian American mothers.<sup>9</sup>



Place matters as well. The legacy of discrimination in housing and mortgage lending practices has created communities where the extent to which individuals can access a good education, quality healthcare services, and proximity to well-paying jobs is often highly correlated with race. These realities reinforce and amplify each other. Individuals who are more educated are more likely to live healthier lives and earn a sustainable income. The inverse is also true in that individuals who lack access to quality education, are less likely to earn a living wage and to afford and/or have access to high-quality healthcare.

Understanding the systemic causes that contribute to current disparities also illustrates why United Way's holistic approach, to fight for the education, health, and economic mobility of everyone is made more powerful by applying an equity lens. When we have a better understanding of the underlying causes of disparities, we can implement strategies explicitly designed to address them.

1 U.S. Census Bureau. Wealth and Asset Ownership. <https://www.census.gov/topics/income-poverty/wealth.html>.

2 U.S. Census Bureau: <https://www.census.gov/library/publications/2019/demo/p60-266.html>.

3 U.S. Census Bureau: <https://www.census.gov/library/publications/2019/demo/p60-266.html>

4 NAEP Report Card: Reading. <https://www.nationsreportcard.gov/reading/nation/achievement?grade=4>

5 Measure of America of the Social Science Research Council. <http://measureofamerica.org/disconnected-youth/>

6 National Center for Education Statistics. [https://nces.ed.gov/programs/digest/d17/tables/dt17\\_104.20.asp](https://nces.ed.gov/programs/digest/d17/tables/dt17_104.20.asp)

7 U.S. Census Bureau. <https://www.census.gov/library/publications/2017/demo/p60-260.html>

8 Centers for Disease Control and Prevention. <https://www.cdc.gov/nchs/data/databriefs/db288.pdf>

9 Centers for Disease Control and Prevention. [https://www.cdc.gov/mmwr/volumes/68/wr/mm6818e1.htm?s\\_cid=mm6818e1\\_w](https://www.cdc.gov/mmwr/volumes/68/wr/mm6818e1.htm?s_cid=mm6818e1_w)



## ADVANCING EQUITY WITH OUR PARTNERS/ CONSTITUENTS

No one entity, institution, or business alone can address the myriad of issues and close the gaps that contribute to disparities in education, health, and economic mobility. The inequitable society that we live in today is the product of years of institutional policies and systems that were created to favor one group of people over another. Such complex and layered practices can only be undone through sustained advocacy, partnership, and collaboration across a variety of sectors that have a vested interest in creating a more equitable society. United Ways are boundary spanners, able to work across sectors to engage business, the nonprofit community, government agencies, and community residents. Our position is ideal for implementing meaningful change in communities. Yet, we will not be able to effect lasting change unless we work with our partners across all sectors. Effectively engaging partners and working cross-sector to achieve racial equity requires an understanding of partner priorities, which vary within and between organizations.

### COMMUNITY RESIDENTS

Unequal access to quality education, affordable housing, good health, and better jobs are significant barriers that prevent and have prevented communities, particularly low-income communities of color, from achieving their full potential. Creating and sustaining equitable conditions within our communities can contribute to the health and success of our nation as a whole. Community driven solutions are crucial to advancing equity to ensure that it is not solely an outcome but also a process where all residents' voices are heard and valued to achieve any desired outcomes. With a history of engaging community members to develop and strengthen our impact work, United Ways are well equipped to work with residents to make sure that they play active roles in creating more equitable communities.

### COMMUNITY PARTNERS

Similar to the United Way network, our partners within the nonprofit sector are recognizing that they cannot achieve their organizational goals and/or desired community outcomes, without addressing equity both internally and



**The entry of a younger and more diverse generation of potential donors into the workforce, many of whom want to actively be involved on global and national issues - presents a largely untapped reservoir of advocates, volunteers, and investors in United Way's community impact work. However, we must consider that these prospective donors are available to us only if the issues we work on are relevant to them, we have meaningful ways to engage them, and we know how to reach them where they are.**

externally. The path that nonprofits are taking to become more equitable vary across the sector and based on organizational priorities. The strategies can include everything from diversifying hiring practices and board membership to represent the communities that they serve

to using data to assess needs and set relevant goals.

<sup>10</sup>Additionally, the philanthropic community is increasingly requiring grantees to explore and address equity through community partnership, engagement, etc.

### DONORS

Changes in the workforce, technology, income inequality, and the demographic makeup of the United States have transformed how individuals give to the causes that they care most about. Today's donors are more likely to give online (as opposed to the workplace), to give to specific causes, rather than trust someone to invest their dollars for them, and desire to be engaged directly, through volunteerism and advocacy, in the work to improve their community. Persistent and growing income inequality has resulted in the further and extreme concentration of wealth that has created a class of donors able to give multi-million-dollar gifts even while overall giving has declined. And growing demographic diversity in the U.S., fueled by immigration and birth patterns, is creating a younger generation that is majority people of color.

The changing donor landscape presents both a challenge and an opportunity for the United Way network. Historically, United Way donors have been primarily white and male. Engaging a more diverse base of donors is critical to the long-term financial health and viability of United Ways. The entry of a younger and more diverse generation of potential donors into the workforce, many of whom want to actively be involved on global and national issues - presents a largely untapped reservoir of advocates, volunteers, and investors in United Way's community impact work. However, we must consider that these

prospective donors are available to us only if the issues we work on are relevant to them, we have meaningful ways to engage them, and we know how to reach them where they are. The transition to an information economy and economic downturns exacerbated by persistent, systemic inequities have resulted in younger generations who are less certain of their economic future than older Americans. Engaging young donors specifically will necessitate having an impact agenda that is grounded in these changing economic and social realities. The challenge will be to maintain older, white and wealthier donors, many of whom have been the beneficiaries of past and current systems that perpetuate inequality, and who often have a very different lived experience than many new and prospective donors.

### COMPANIES

According to the W.K. Kellogg Foundation, by 2050 people of color will represent the majority of our country's population, workforce, and consumers.<sup>11</sup> The potential social and economic opportunities for our corporate partners are endless if they effectively address this shifting population and work to close the racial equity gap. For example, in the U.S. alone, addressing equity would generate an additional \$191 billion spent on food, \$500 billion on housing, \$52 billion on apparel, \$259 billion on transportation, and \$77 billion on entertainment each year.<sup>12</sup> To respond to and effectively capitalize on the changing demographics, our partners must develop new strategies to develop and nurture diverse talent pipelines, engage employees, and deepen investments in the communities that they serve.

### EXAMPLE: TOYOTA'S LET'S JOIN HANDS

**Through Toyota's 2016 Let's Join Hands Olympic marketing campaign, United Way Worldwide received \$250,000 to build Safer and More Equitable Communities. The generous sponsorship enabled United Way to support local initiatives that bring people together and establish best practices, develop tools and resources for the United Way network, and share learnings and partnerships.**

<sup>10</sup> "Why Diversity, Equity, and Inclusion Matter for Nonprofits." National Council of Nonprofits, 2 Nov. 2019, <https://www.councilofnonprofits.org/tools-resources/why-diversity-equity-and-inclusion-matter-nonprofits>.

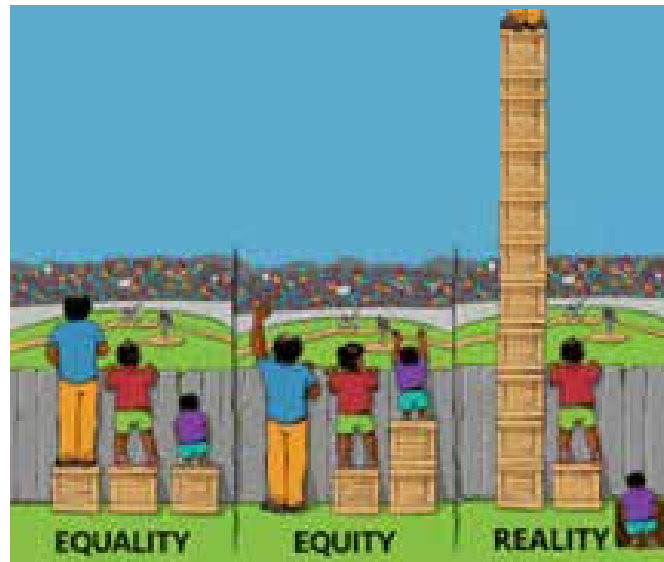
<sup>11</sup> Business Case for Racial Equity. (2018, July 24). Retrieved November 22, 2019, from <https://www.wkkf.org/resource-directory/resource/2018/07/business-case-for-racial-equity>.

<sup>12</sup> IBID



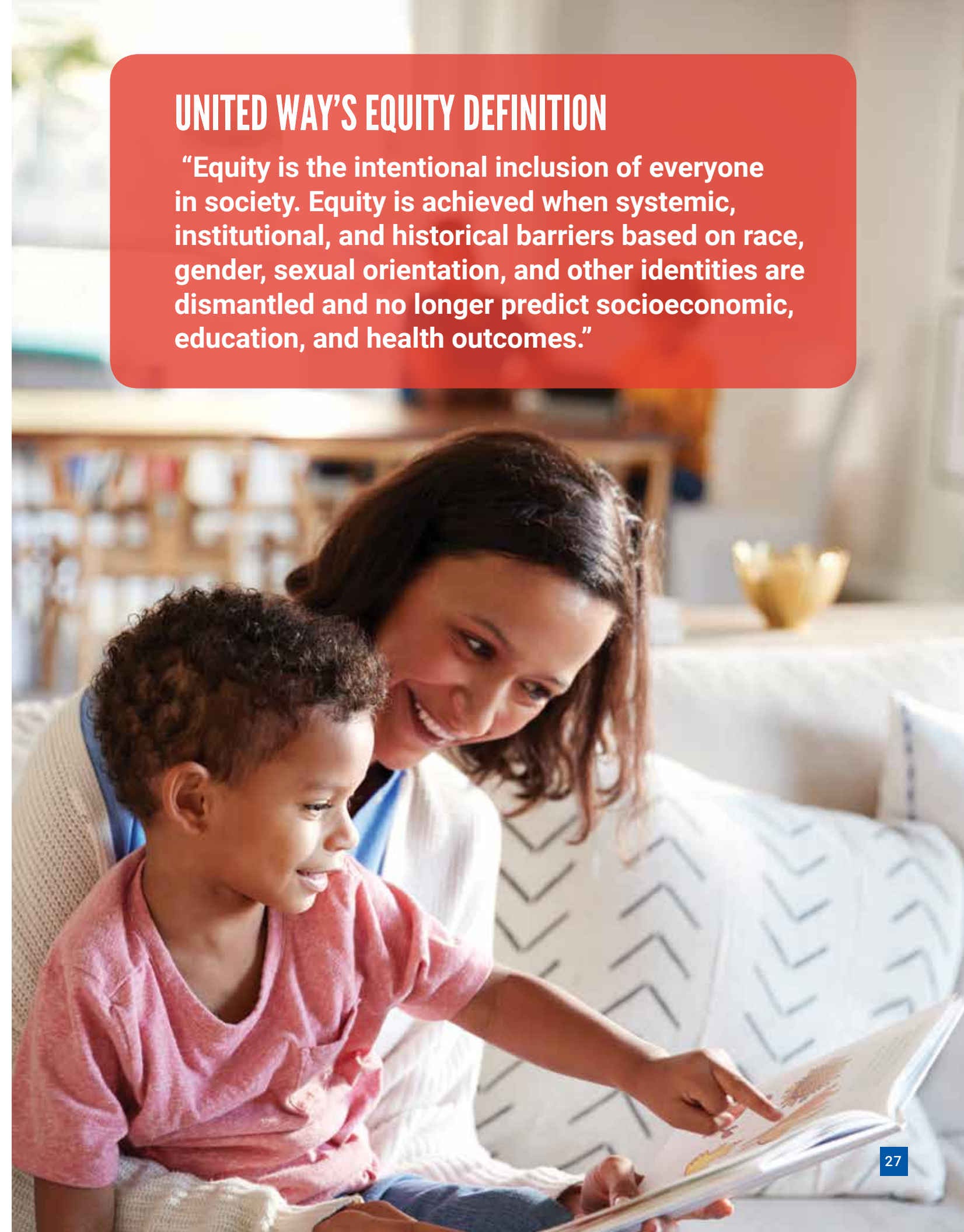
# SHARED DEFINITION AND VISION OF EQUITY

**A**t the center of this work is a shared definition of equity for the United Way network in the United States. To assist in the development of this Equity Framework and create a shared definition of equity, United Way Worldwide convened a national Equity Advisory Committee that included local United Way representatives and national partner organizations with significant experiences and perspectives related to addressing equity. The definition and vision below are to appear in tandem and form the foundation for the rest of the Equity Framework. They jointly emphasize the importance of focusing on systems change, an acknowledgment of how our shared history has contributed to present-day realities, and the positive role the United Way network can play in creating a more equitable society.



## UNITED WAY'S EQUITY DEFINITION

**“Equity is the intentional inclusion of everyone in society. Equity is achieved when systemic, institutional, and historical barriers based on race, gender, sexual orientation, and other identities are dismantled and no longer predict socioeconomic, education, and health outcomes.”**



## UNITED WAY'S EQUITY VISION

**“We recognize structural racism and other forms of oppression have contributed to persistent disparities which United Way seeks to dismantle. Our United Way network strives to engage community members, especially those whose voices have traditionally been marginalized. We work with residents and public and private partners to co-create solutions that ensure everyone has the resources, support, opportunities, and networks they need to thrive. We commit to leveraging all of our assets (convening, strategic investments, awareness building, advocacy) to create more equitable communities.”**





LEVER

# DATA

## RATIONALE

Data is a foundational lever for equity and is a critical element that supports all the other levers in this framework. The use of data, especially community-level aggregated information, is a typical part of United Way's overall approach to developing impact goals, strategies, and programs to improve outcomes in education, economic mobility, and health. Our United Way's Impact Approach starts with looking at community-level data to understand: the prevalence and scope of an issue, who in the community is most impacted, and the aspects of the issue most important to potential donors. Most United Ways are experienced at leveraging existing data. Some have successfully created data-sharing agreements with key community partners and local institutions to facilitate access to data that is not publicly available. United Way's community engagement efforts have also led to a widely shared understanding that "data" also includes the perspectives of community residents, donors, and board members.

Examining data with an intentional focus on equity further increases the diversity of perspectives and can dramatically alter the way United Ways and their community partners frame issues and design solutions. Although data on disparities, needs, and existing assets is used regularly by many United Ways to understand the issue and to develop impact strategies, using this lever to advance equity requires pushing further in our data practices.



It is important to note that data is often assumed to be objective and therefore free of bias. In the context of equity, it is essential to acknowledge that objectivity is impossible. The methodologies and collection methods we employ, the individuals or systems analyzing the data, and the way we communicate data, are all influenced by the broader societal conditions and conventions in which these activities are happening. Thus, the data is ultimately subject to bias. Indeed, what is considered valid data versus anecdotal evidence is steeped in historical and modern concepts that are often limiting.

### THIS INCLUDES

- Increasing the use of disaggregated data whenever possible.
- Building the capacity of United Way funded programs and agencies to collect, report, and use disaggregated data.
- Using data to understand and effectively communicate about current and past structural and institutional patterns of discrimination and inequality, to build greater awareness and make the case for equity.
- Using data to identify root causes of issues and to create equity-specific impact goals and strategies.
- Using data to effectively frame issues and personal narratives within a broader community context.
- Identifying gaps and addressing inequities in United Way's resource allocation and grantmaking processes.
- Using data to inform policy and advocacy strategies, and to address inequities in state and local policies (e.g. prison sentencing guidelines).
- Ensuring more equitable access to data for all community members.





STARTING POINT – TAKE STOCK!

Assess your United Way’s progress against the indicators below to understand areas of strength and areas of challenge related to how you are currently leveraging data to create more equitable approaches to your impact work. Use your scores to identify and prioritize strategies and action steps (see next sections) to deepen and accelerate your data collection efforts.

DATA	5 ALWAYS	4 OFTEN	3 SOMETIMES	2 RARELY	1 NEVER	? UNSURE
Our United Way consistently collects both quantitative and qualitative data.						
Our United Way disaggregates data based on race/ethnicity gender, sexual orientation, income level, and ability status.						
Our United Way uses the qualitative and quantitative data we collect to understand the root cause of issues.						
Our United Way has mapped community-based assets to understand existing efforts, resources, and leadership capacity focused on addressing inequities.						
Our United Way prioritizes making progress on indicators that close gaps across race/ ethnicity, gender, sexual orientation, income level, and ability status.						
Our United Way utilizes data to tell stories that highlight root causes and frame community issues as systemic.						
Our United Way tracks progress over time related to closing gaps and disparities in key education, economic mobility, and health indicators.						
Our United Way uses data on disparities to inform our resource investment decisions.						
Our United Way values lived experiences as valid sources of data and information.						
Our United Way has established data-sharing agreements with community partners, local institutions, and funded agencies/programs to facilitate a shared understanding of existing gaps and disparities.						
Our United Way regularly shares the results of our data gathering efforts with the community.						
TOTAL:	___ / 50					



DETERMINE YOUR PATH FORWARD – SUGGESTED STRATEGIES

Use your score from the organizational assessment to select strategies from the list below that best fit your stage of data work, organizational and community context and capacity. Assuming that your United Way is already utilizing data to establish your impact goals, priorities, and strategies, the actions below will help more effectively integrate a specific equity lens:



Collect and disaggregate data based on race/ethnicity, gender, sexual orientation, income level, and ability status. By disaggregating data, we are able to hyper-focus our strategies and develop indicators that are nuanced and informative of the outcomes and impact we are committed to achieving. This is imperative to achieving equity because it allows us to uncover disparities driven by systemic inequities and focus our resources on closing gaps between and within groups that are most impacted by those disparities.



Utilize data to tell stories that help to uncover root causes and frame systemic issues. Ensuring that storytelling is rooted in historic and present contexts as well as systemic factors helps to drive strategies focused on dismantling inequitable systems. Some examples include data and storytelling as a foundation to develop laws and policies, place-based initiatives, cross-sector partnerships, and community mobilization.



Use data to develop a shared understanding of the problem and to identify existing community assets:

- Establish a baseline for your community. Leverage strategic partnerships including local universities to conduct a community needs assessment and/or work with organizations/institutions that have already conducted assessments (e.g. health departments, hospitals). Engage the community in this process to ensure their perspectives are reflected in the design and execution of this assessment.
- Select your indicators. Uncover root causes by engaging community partners. Select those indicators in collaboration with community partners and use those indicators to identify what outcomes have the greatest disparity amongst groups.
- Map existing community assets to understand what is already in place and could be leveraged as part of your efforts and/or where your United Way could add value as a supporter. This is a reliable way to avoid duplicating well-established efforts and to focus your United Way’s work on filling potential gaps (e.g. lack of awareness, key constituencies not engaged in the work, disconnected efforts).



Track equity progress over time. Systematically track, aggregate, and interpret data, especially in collaboration with community residents and partners. Identify (and track over time) specific community-level indicators with significant inequities based on historical and current discrimination related to race/ethnicity, gender, income level, and ability status. Recognize that because you are focusing on shifting systemic inequities change may be slower than expected. Be sure to set appropriate impact goals and invest in medium and long-term interventions to drive community outcomes.



Incorporate data and equity in resource allocation processes. Explicitly focus on reducing disparities, including weighing more heavily potential investments that reduce disparity.

RELATED CRITICAL SUCCESS FACTORS (MODERN UNITED WAY)

- Effectively Learn By Using Data
- Understand Your Market



# ACCELERATE YOUR EFFORTS


If you are already implementing all or most of the strategies listed above, consider adding some of these to deepen your data efforts:




Utilize community-led participatory research. Involve community members in data collection and analysis and incorporate their unique perspectives into the overall understanding of the challenges facing the community and the assets that might be leveraged to create solutions.



Acknowledge bias is present in data collection. Publicly share the inherent bias that exists when assembling and presenting data and proactively work to mitigate that bias through decolonized methodologies of research.<sup>13</sup>



Value lived experiences as valid sources of data/information. Collect and regularly share the lived experiences of community members along with quantitative data on priority issues. As noted earlier, the broader context in which we operate in the U.S. often values certain types of data (e.g. quantitative versus qualitative data) and specific data/research methods (e.g. randomized control trials versus ethnographic studies) over others. These biases are ingrained in how we generally interpret and value information. Aggregated community data can help your United Way determine the prevalence of an issue but has limitations in terms of understanding the root causes of disparities and the interconnectedness of what may appear to be on the surface discrete issues. Sharing personal narratives, stories, and experiences as part of your overall data presentations also helps to legitimize this approach to better understanding community needs, assets, and challenges.



Establish shared agreements with funded agencies and partners of what data you will collect and why. Ensure that the data collected includes both quantitative and qualitative measures. Clearly articulate how the data will be used and who will have access to it. Pay special attention to the ways data can be used to disadvantage communities and groups and proactively mitigate that practice. This includes making certain that individuals are given the opportunity to consent to have their data used (or to opt-out). Equitable data practices ensure that a broader definition of data is valued and seen as legitimate.



## UNITED WAY EXAMPLE

The *United Way of Central Alabama* and local partners established the Jefferson County Health Action Partnership (HAP) in 2007 to address health disparities and improve the health of Jefferson County Residents. The reports highlight areas of greatest need and continue to play an important part in raising community awareness of the social determinants of health. As a result of releasing the reports, health equity discussions have been brought to the forefront within the community and there has been an ever-increasing demand for local training on equity, diversity, and inclusion. To date, over 1,400 individuals have received training on health equity and the social determinants of health, including staff at United Way of Central Alabama. The Health Action Partnership has an accountability structure in place to align community-based work with health equity guiding principles. Next steps for UWCA include creating health equity reports for the additional four counties in the UWCA service area.




<sup>13</sup>Smith, Linda Tuhiwai, 1950-. *Decolonizing Methodologies: Research and Indigenous Peoples*. London; New York: Dunedin: New York: Zed Books; University of Otago Press; distributed in the USA exclusively by St Martin's Press, 1999.



# APPLYING AN EQUITY LENS

## SAMPLE ACTIVITIES IN CHILDHOOD/YOUTH SUCCESS, ECONOMIC MOBILITY AND HEALTH

IMPACT AREA	SAMPLE ACTIVITIES
 <b>CHILDHOOD SUCCESS</b>	Use school data to identify readiness gaps. Geomap neighborhoods against schools to understand the greatest disparities in readiness and what early childhood programs, resources, and opportunities are or are not available.


OUR PROPOSED ACTIVITY:

IMPACT AREA	SAMPLE ACTIVITIES
 <b>YOUTH SUCCESS</b>	Partner with schools, especially those that are low-performing and/or where 40 percent or more of the students qualify for Free and Reduced Meals (FARMs), to create data-sharing agreements to access data on student grades, attendance, and behavior and identify which students could benefit from additional, timely supports (tutoring, afterschool and summer programs, mentoring).

OUR PROPOSED ACTIVITY:

IMPACT AREA	SAMPLE ACTIVITIES
 <b>ECONOMIC MOBILITY</b>	Examine educational attainment levels, disaggregated by race/ethnicity and gender, in the communities and/or counties your United Way serves. Compare this to education requirements for the largest/fastest growing industries in your community/metropolitan area to understand the magnitude of the gaps and to develop solutions.

OUR PROPOSED ACTIVITY:

IMPACT AREA	SAMPLE ACTIVITIES
 <b>ACCESS TO HEALTH</b>	Map the location of supermarkets that provide fresh produce. Overlay demographic Census data and transit routes to understand the extent to which access to healthy food correlates with race/ethnicity, income level, and/or access to public transportation.

OUR PROPOSED ACTIVITY:





# TAKE ACTION

WHAT ARE OUR THREE PRIORITY STRATEGIES FROM THIS LEVER?

- 1.
- 2.
- 3.

WHAT RESOURCES DO WE NEED TO SUCCESSFULLY EXECUTE THESE STRATEGIES?

WHO DO WE NEED TO ENGAGE TO SUCCESSFULLY EXECUTE THESE STRATEGIES?

WHO ON OUR TEAM IS RESPONSIBLE FOR IDENTIFYING NEXT STEPS IN EXECUTING THESE STRATEGIES?

ADDITIONAL NOTES



TRACK PROGRESS – SAMPLE SUCCESS MEASURES

SUGGESTED METRICS	WE ALREADY MEASURE THIS	WE WILL MEASURE THIS NOW/IN THE FUTURE	WE DON'T HAVE PLANS TO MEASURE THIS
# and % of United Way funded agencies and programs who report disaggregated data			
# of key community indicators in education, income and health, disaggregated by race that your United Way is tracking to document systemic and significant disparities/inequities between populations in access, opportunities, and outcomes (e.g. early childhood programs, school resources, poverty, access to healthcare services, homeownership, wages, employment, school readiness, 3rd grade reading, high school graduation rate)			
# of United Way and/or community impact goals that are explicitly focused on closing gaps and disparities (e.g. close race and/or gender-based wage gaps by X amount by X timeframe)			
% change in United Way and/or community impact goals over time (e.g. increase/decrease in race and income-based gaps in high school graduation rates)			
# of community residents engaged to collect and analyze local data that provides them an opportunity to leverage their expertise and perspectives			
# of community residents engaged to share their lived experiences (qualitative data), especially those representing historically underrepresented and/or disadvantaged groups			
# and % of success stories generated by United Way that highlight systemic issues and/or solutions			



HIGHLIGHTED RESOURCES

**Making It Count: The Evolution of the Ford Foundation’s Diversity Data Collection**  
The Center for Effective Philanthropy

This publication describes the role funders can play in normalizing diverse data collection, how funders may perpetuate harm, and where funders can initiate conversations about diversity, equity, and inclusion (DEI) both internally and with the organizations they support.





LEVER

# COMMUNITY MOBILIZATION + ENGAGEMENT

R

## ATIONALE

Community engagement is a critical part of the value add of a United Way in a community. The ability to convene community residents from diverse backgrounds and perspectives is part of what differentiates us from other organizations. Over the past decade, United Way has deepened our overall capacity to authentically engage community residents to identify, discuss, and work together on issues of concern. This is best reflected in the United Way Mobilization Groups, a partnership initiated in 2010 between United Way Worldwide and the Harwood Foundation to engage cohorts of United Ways committed to developing stronger relationships with community residents and more deeply engaging them on the issues of education, economic mobility, and health. UWW launched four mobilization groups that included close to 50 United Ways over several years focused on Education, Income/Economic Mobility, Early Grade Reading, and Health. Participating United Ways received coaching, customized technical assistance, and peer learning opportunities to increase their organization's ability to reach community residents, deepen their understanding of community needs and issues, and to integrate this knowledge into impact work. Visit United Way Online to access general tools and resources related to community engagement.

This legacy provides a solid foundation on which United Ways can build. In some instances, participating United Ways built on initial community conversations, then subsequently focused more intentionally on conversations about equity and/or race equity (see the United Way of Racine example below). Yet, the Mobilization effort, while issue-focused, did not explicitly focus on equity as a process and an intended outcome. Integrating an equity lens into community engagement and mobilization efforts can create opportunities for empowerment, in that residents themselves can shape solutions to the issues and challenges that they have identified.

Informal networks are mechanisms for sharing information and connecting members to opportunities and resources that may not be widely known or publicly available. The strength or weakness of a network has implications as to which opportunities and resources people can access, and contributes to social inequity because those with strong networks benefit from connections while those with weak ones do not. United Ways that are knowledgeable of these networks can help people access social capital that closes gaps by creating spaces for people to connect to informal networks.



## UNITED WAY'S COMMUNITY ENGAGEMENT EFFORTS THAT EXPLICITLY FOCUS ON EQUITY CAN:

- Create opportunities for community residents to reflect on how their life experiences have been, and are currently, shaped by their identities and the value placed on those identities by the larger society, structures, institutions, and individuals
- Create more effective impact solutions in education, economic mobility, and health; more likely to uncover underlying issues, and create solutions that reflect community assets and challenges, because the solutions are grounded in the lived experience of community residents
- Increase the likelihood for greater community buy-in and ownership of proposed solutions
- Level the playing field for engagement, by recognizing and valuing the diverse perspectives that community residents bring based on their unique identity, role, and experiences
- Empower residents by amplifying new voices, especially those that are often under-represented in decision-making, as well as identifying existing leaders, and potential allies to be part of crafting solutions
- Create opportunities for increased cross-cultural understanding by connecting people from different backgrounds and perspectives
- Create space for developing shared purpose, community goals, and establishing common ground across key constituencies (residents, the nonprofit sector, business community, local government)
- Improve citizens' knowledge, skills, and efficacy in problem-solving
- Create opportunities for United Ways to connect community members to informal networks





STARTING POINT – TAKE STOCK!

Assess your United Way's progress against the indicators below to understand areas of strength and areas of challenge related to how you are currently engaging and mobilizing community residents to create more equitable approaches to your impact work. Use your scores to identify and prioritize strategies and action steps (see next sections) to deepen and accelerate your engagement efforts.

COMMUNITY MOBILIZATION AND ENGAGEMENT	5 ALWAYS	4 OFTEN	3 SOMETIMES	2 RARELY	1 NEVER	? UNSURE
Our United Way has staff at all levels of leadership that reflect the demographic diversity of the communities we serve.						
Our United Way has engaged external organizations and residents to assess the degree of trust and credibility we have, to create meaningful community engagement.						
Our United Way uses stories and data in our community engagement efforts to create shared community understanding about historical and current inequities.						
Our United Way uses stories and data in our community engagement efforts to compel people to action.						
Our United Way focuses our engagement activities on identifying opportunities for community action and long-term change.						
Our United Way has developed shared expectations for community engagement and we assess each engagement effort during and after it is complete.						
Our United Way compensates participants in our community engagement efforts.						
Continue on the following page						

Continued		5 ALWAYS	4 OFTEN	3 SOMETIMES	2 RARELY	1 NEVER	? UNSURE
COMMUNITY MOBILIZATION AND ENGAGEMENT							
Our United Way regularly uses equitable convening practices in our engagement activities (e.g. providing food, childcare, and transportation; ensuring accessibility of physical space and materials; considering the best time of day to convene; providing multiple opportunities for participation that vary in time commitment and intensity).							
Our United Way has mapped relationships, institutions, and organizations in our community to understand local power dynamics, the landscape, and the cultural context in which we are operating.							
Our United Way partners with grassroots community leaders, affinity groups, and other community-based organizations with local credibility and strong ties to the community in our efforts to connect with and engage residents.							
Our United Way supports the establishment of and resources community-led decision-making bodies.							
Our United Way invests in building the leadership capacity of community residents.							
Our United Way prioritizes for investment strategies and initiatives that have been informed by and/or developed in collaboration with community residents.							
TOTAL: _____ / 65							



# DETERMINE YOUR PATH FORWARD – SUGGESTED STRATEGIES

Local United Ways have a long history of engaging and mobilizing within the communities they serve. When it comes to equity, United Ways have a unique role in advancing equity through Community Mobilization and Engagement. If your United Way is looking for an opportunity to deepen your practice of equity through this lever, the following strategies are a good place to start:



Honestly assess your United Way’s history of meaningful community engagement. United Ways vary in the level of trust and credibility we have in communities. Your ability to serve as an honest broker in engagement will be in part based on community resident perceptions of how diverse and inclusive your organization is internally (e.g. diversity of staff, leadership and board members), how you have historically invested resources in the community, and to what extent you have already engaged diverse community members in United Way’s impact work.



Focus on building trust. By cultivating authentic, and not transactional, relationships you can more effectively engage and mobilize the community to drive down inequities.

Building trust does not happen overnight - it takes time and resources. Some critical aspects of community trust-building are:

**Intentionality**

Be intentional about the process by which you are engaging. Think critically about who is there and who is not, who speaks, and whose words gain the greatest traction. Consider how and when you are engaging people. Ensure your methods address complex barriers to engagement for some communities and groups. Different work schedules, childcare, and transportation considerations make it more difficult for some to participate in in-person meetings.

**Build credibility**

Meet people where they are and create feedback loops to demonstrate that their contributions are being incorporated over time. Honor their contributions in United Way’s work by naming the contributors.

**Connect to the community**

Use language and stories that are resonant and relevant. Engage community members in the review of United Way documents to check that documents resonate with core audiences.

**Engage with humility**

Be open to criticism from community members who may doubt your United Way’s commitment to equity and/or willingness to stay the course. Address it by being transparent about what your organization can or cannot commit to and collectively identifying opportunities for improvement.



Map and engage key community-based organizations, institutions, and leaders to enhance your outreach. Faith-based and community-based organizations, higher education institutions, K-12 school systems, government agencies, economic institutions, corporate partners, policy and advocacy organizations, and affinity groups like 100 Black Men and Unidos often have strong ties to the communities they serve. These organizations can help you establish reach and relationships with community residents that are active within these groups. Think outside of the box when it comes to engaging community residents. If some groups haven’t/don’t want to be engaged, find out what’s getting in the way, and focus on building trust.



Create on/off ramps for engagement that reflects changes in an individual’s capacity to be engaged. Other commitments and life changes can impact the duration and level of an individual’s participation. Some leaders may change in the community. Create diverse opportunities for people so that they can participate based on the amount of time and capacity they can offer.



Act as a convener by cultivating cross-cultural connections, networks, and partnerships. Acknowledge how power imbalances affect partnerships and relationships between groups and individuals in communities. Be transparent in recognizing the power position of United Way as a funding organization in the community.

## RELATED CRITICAL SUCCESS FACTORS (MODERN UNITED WAY)

- Engage the Community in Solving Relevant Issues
- Develop Compelling Products and Solutions



DETERMINE YOUR PATH FORWARD – SUGGESTED STRATEGIES *Continued*



Model equitable convening practices. Think about how you are meeting people where they are and ways you can add their voice. Consider things like meeting location and timing, the use of visuals, using microphones, translators, accessibility, transportation, childcare, and food.



Partner with trusted community leaders and organizations to engage residents and reach beyond the usual suspects. It is easy to reach out to the same five people who are well-known and trusted but relying only on those five people limits capacity and perspectives that would make the work richer and more robust. Sometimes community leaders don't have titles but are well known and respected in their community. Ask funded and non-funded partners for advice on how to reach individuals who are considered informal leaders in the community.



Consider the identities and demographics of the people who benefit from United Way's work and those who support it when you design your community engagement efforts. Understand that many of your donors might also be those who directly benefit from your work and that most residents want to contribute to the success of their community. Honor this by ensuring that your engagement efforts intentionally create opportunities for those who benefit from United Way led efforts to inform and/or co-create solutions. Where significant racial, gender, and economic differences exist between most of your donors and community residents, be sure to create meaningful opportunities for engagement that do not tokenize or patronize individuals.



Focus community engagement efforts on driving meaningful long-term change. Some residents are also more likely to be skeptical that actual change is possible and that they will be heard. Repeated engagement activities that do not fundamentally alter realities in a community can increase frustration over time and quell participation, as residents begin to doubt the commitment or possibility for change. It is critical that your United Way is realistic about how the input will be used, how much of a role residents will have to shape the work, what can be accomplished and by when. Appropriately setting shared goals, expectations, and anticipated timeframes can help keep community residents engaged over the long-term.



Use stories and data to paint a narrative that helps build a shared community understanding about historical and current inequities and compel people to action. In recent years, many United Ways have bolstered their ability to connect people to important issues by sharing personal success stories. Applying an equity lens to this work can help community residents, partners, and funders better understand the underlying conditions, patterns of discrimination, and/or unequal access that gives rise to the personal challenges we highlight in those personal testimonies. United Ways can use data and narrative storytelling to ensure that storytelling centers on root and systemic causes, not on individual or community deficits. Take an asset-based approach when creating and transmitting narratives. Be willing to unpack areas of resistance and to engage in dialogue about the underlying beliefs, assumptions, and implicit biases that residents from different backgrounds may bring to the conversation.





# ACCELERATE YOUR EFFORTS

If you are already implementing all or most of the engagement strategies listed above, consider adding some of these to deepen your efforts:



Develop shared expectations for community engagement and assess each engagement effort during and after it is complete. Creating goals before the engagement will ensure that you prioritize equity values. Evaluation of these goals should occur throughout the process and successes reported and reviewed upon completion.



Compensate participants in your community engagement efforts. This acknowledges systemic inequities and supports equitable access for partners with different resources.



Prioritize community-driven initiatives. When engaging the community, be willing to adjust or abandon agendas that are not deeply informed by and developed with community residents, especially those most impacted by the issue. This adaptive approach will optimize lessons learned in the process. Be willing to leverage the brand reputation to amplify and channel the authentic voice of the community with donors to inform, educate, share with them community concerns. Shared learning for all partners is an investment in equitable engagement.



Establish and invest in community-led decision-making bodies in your process. Being explicit and transparent about the timing and roles encourages participation and shared expectations.



Invest in building the leadership capacity of community residents, where needed, to advocate for their community. Identify opportunities for community members to share their experiences and perspectives in external communications and with partners. More leadership opportunities can amplify the impacts of equity in the process.



Continue to broaden your reach. Engage youth, artists, and elders in your community engagement efforts. Inviting diverse skills and perspectives allows for more robust responses, and therefore better data input.



## UNITED WAY EXAMPLE

The *United Way of Racine County* engaged more than 400 residents in kitchen table style conversations about challenges, aspirations, and goals related to race, equity, and inclusion. Resulting action steps from the conversations included the creation of a Declaration of Inclusion, the development of a Diversity Council to engage business leaders to create diverse, supportive workplaces, and hosting a community event to celebrate community-wide diversity.



## UNITED WAY EXAMPLE

The *United Way of Central Maryland (UWCM)* brought the Race Card, a program of the Aspen Institute, to the greater Baltimore community. This helped United Way get acquainted with residents from over 48 neighborhoods and facilitate conversations at major events. United Way used the Race Card to engage 500 women leaders at the Women United Forum, as well as to engage over 400 homeless individuals at Project Homeless Connect. The information gathered through this process helped to provide direction for the strategic plan and set the course for the next 6 years. The overarching objectives for the plan were set as a result of this project, one of which is that fewer people living as ALICE (asset limited, income constrained, and employed). These efforts helped UWCM to form new and strengthen some relationships, both with existing partners and with community members. It gave credibility in their desire to keep equity at the forefront of our work.



APPLYING AN EQUITY LENS

SAMPLE ACTIVITIES IN CHILDHOOD/YOUTH SUCCESS, ECONOMIC MOBILITY AND HEALTH

IMPACT AREA	SAMPLE ACTIVITIES
<div><div><div>A</div><div>B</div><div>C</div></div><div>CHILDHOOD SUCCESS</div></div>	Mobilize families and other community residents to advocate for increased resources (reading specialists, afterschool and summer programming, and volunteer tutors) at low-income schools that serve disproportionate numbers of children not reading on grade level.

OUR PROPOSED ACTIVITY:

IMPACT AREA	SAMPLE ACTIVITIES
<div><div><div><div>Graduation cap</div><div> diploma</div></div></div><div>YOUTH SUCCESS</div></div>	Mobilize families to advocate for increased student access to advanced coursework (Advanced Placement, International Baccalaureate programs), test preparation programs, college awareness, and career support at schools that predominantly serve students of color and/or low-income students. In low-performing schools, work with parents/families to ensure that they have representation on school improvement teams.

OUR PROPOSED ACTIVITY:

IMPACT AREA	SAMPLE ACTIVITIES
<div><div><div><div>Piggy bank</div><div> coin</div></div></div><div>ECONOMIC MOBILITY</div></div>	Convene community forums to share data on current disparities in homeownership and understand their origins in historical patterns of lending discrimination and redlining. Help residents consider the long-term impact on family net worth and mobilize them to advocate for solutions to address housing inequities.

OUR PROPOSED ACTIVITY:

IMPACT AREA	SAMPLE ACTIVITIES
<div><div><div><div>Heart</div><div> ECG</div></div></div><div>ACCESS TO HEALTH</div></div>	Organize focus groups of women of color to understand experiences with pre and post-natal medical treatment; share these findings with community-based health providers and partners.

OUR PROPOSED ACTIVITY:







# TAKE ACTION

WHAT ARE OUR THREE PRIORITY STRATEGIES FROM THIS LEVER?

- 1.
- 2.
- 3.

WHAT RESOURCES DO WE NEED TO SUCCESSFULLY EXECUTE THESE STRATEGIES?

WHO DO WE NEED TO ENGAGE TO SUCCESSFULLY EXECUTE THESE STRATEGIES?

WHO ON OUR TEAM IS RESPONSIBLE FOR IDENTIFYING NEXT STEPS IN EXECUTING THESE STRATEGIES?

ADDITIONAL NOTES



TRACK PROGRESS – SAMPLE SUCCESS MEASURES

SUGGESTED METRICS	WE ALREADY MEASURE THIS	WE WILL MEASURE THIS NOW/IN THE FUTURE	WE DON'T HAVE PLANS TO MEASURE THIS
# of community partners enlisted by United Way to help convene community residents (e.g. faith-based, K-12, affinity groups)			
# and % of participants in United Way convenings (e.g. forums, community conversations, focus groups) disaggregated by race/ethnicity, gender, ability status, etc.			
# and % of community convenings focused on issues of concern identified by community members, especially historically underrepresented and/or disadvantaged groups			
# and % of community meetings that reflect equitable practices (e.g. location, transportation, translators, accessibility, childcare, food)			
\$ amount and proportion of the overall budget spent on community engagement activities			
# and % of United Way Impact and Community Engagement staff from diverse backgrounds (race/ethnicity, gender, ability status, etc.)			
# and % of community members from under-represented and/or historically disadvantaged groups who serve as United Way leadership volunteers			



HIGHLIGHTED RESOURCES

Advancing Equity through Collective Impact - United Way Worldwide and the Collective Impact Forum

This webinar focuses on the potential of collective impact efforts to advance equity in communities. It includes an overview of the key building blocks for equity-focused work and highlights specific equity initiatives currently underway at the United Ways of Southeast Louisiana and the Research Triangle.





LEVER

# COMMUNICATIONS + AWARENESS-BUILDING

## RATIONALE

United Way benefits from a generally positive perception as most of the U.S. public understand that our impact work is focused on engaging community residents to help people live better lives. United Way continually ranks as one of the United States' top charities. Our way of doing business means that United Way has ongoing access to diverse audiences that engage in our work as donors, partners (funded and unfunded), advocates, and volunteers. Most United Ways are viewed as trusted organizations who can be relied upon to share data and stories that convey how the community is faring overall. Many United Ways are also effective at creating compelling individual narratives that illustrate their impact on education, economic mobility, and health.

Communications and Awareness-building has a tremendous impact on the success of equity efforts. Ensuring that a variety of constituencies that span sectors and spaces (corporate, nonprofit, public, community) have a meaningful understanding of both equity challenges and equitable solutions provides a critical foundation from which to foster collaboration, advocacy, and mobilization. Talking about equity and racial equity can be challenging. They are topics that many of us are socialized to avoid because they can make us feel uncomfortable. Developing consistent communications to drive greater awareness can assist in strengthening a community-wide movement for equity, encouraging the leadership of your board to advocate for equity, and informing grantmaking and resource allocation that drives more equitable outcomes. Utilizing data in communications to build a narrative

related to equity is one example of how communications can benefit equity efforts at your United Way. Awareness-building can be a tool to support the success of other equity levers such as Community Mobilization and Engagement.

The nature of your awareness-building activities will depend considerably on your local context. This includes how advanced conversations about equity are, how comfortable individuals and groups feel about engaging in conversations around equity, and whether or not there is a shared understanding of how inequity is expressed in your local context.

Awareness-building can be a long process. Intentionally leveraging strategic communications tactics is often an important first step in an equity effort though ultimately, communications and awareness-building are ongoing processes.



## THESE ASSETS CAN BE LEVERAGED TO ADVANCE AN EQUITY AGENDA

- Our access to diverse audiences allows us to reach them with tailored messaging that connects the need to close disparities and gaps with the issues that they care most about (e.g. affordable housing, jobs, education).
- United Ways, who are trusted purveyors of community information, can leverage this credibility to purposefully share data and stories that highlight the causes of past and current inequities and articulate possible solutions.
- United Ways who develop and publish reports to the community can use this opportunity to present current data on disparities, as well as link them to specific policies, practices, beliefs, and community conditions.

- United Ways can use their multiple communication channels (online, print, social media, in-person) to place individual success stories within a broader historical, community, economic, and social context.
- Community engagement activities led by United Ways and/or partners (conversations, forums, focus groups) can be prime opportunities to heighten awareness on how specific issues are impacting different groups in the community.
- United Ways can use their relationships in the community and multiple communication channels to create spaces for residents to share their own experiences and shift the framing of the work so that community members are building their narratives themselves.





STARTING POINT – TAKE STOCK!

Assess your United Way’s progress against the indicators below to understand areas of strength and areas of challenge related to how you are currently using communications and increasing awareness to drive equity. Use your scores to identify and prioritize strategies and action steps (see next sections) to deepen and accelerate your awareness and communication efforts.

COMMUNICATIONS AND AWARENESS-BUILDING	5	4	3	2	1	?
	ALWAYS	OFTEN	SOMETIMES	RARELY	NEVER	UNSURE
Our United Way invests in staff skills and knowledge to effectively advocate for equity through our community impact efforts.						
Our United Way normalizes and invests in the capacity of our leadership and staff to have internal conversations about inequity, structural racism, and other forms of oppression.						
Our United Way communicates consistently to community residents, partners, and the general public about our organization’s commitment to equity.						
Our United Way has created and publicly shared an equity commitment statement that acknowledges historical bias and creating a more equitable community as a north star.						
Our United Way creates and/or shares reports with the community that highlights present and historical disparities and links them to systemic practices, policies, community conditions.						
Our United Way leverages our corporate relationships to build their awareness about community needs and conditions.						
Our United Way carefully reviews and vets our marketing materials to ensure that we are not inadvertently perpetuating stereotypes or negative images of community residents.						
Our United Way creates materials that are accessible, relevant, and meaningful to the community we are engaging.						
TOTAL:	___ / 40					

DETERMINE YOUR PATH FORWARD – SUGGESTED STRATEGIES

Use your score from the organizational assessment to select strategies from the list below that best fit your stage of data work, organizational and community context and capacity. Assuming that your United Way is already utilizing data to establish your impact goals, priorities, and strategies, the actions below will help more effectively integrate a specific equity lens:

Focus on internal culture and capacity. By investing in the skills, capacities, and knowledge of United Way staff you will be more effective in developing the skills, capacities, and knowledge of others, ultimately driving external impact. For United Ways to act as advocates for equity it is important that staff, management, leadership and boards embody equitable practices, culture, and commitment. See DEI Toolkit for more information on how to accomplish this.

Create consistent messages about United Way’s commitment to equity. Leverage disaggregated data and connect to overall impact such as economic development, education, and health. Align community impact goals and strategies with clear language related to equity.

Build the capacity of community partners to advocate for equity. Offer low and no-cost opportunities for organizational partners to receive training and skills-building. Be intentional about who is leading the training, what the outcomes are, and ensure that those outcomes are communicated clearly.

Build partnerships with organizations that are explicitly addressing equity. Identify who is also focusing on equity and foster partnerships that align time, resources, and strategies to drive community-level awareness.

Normalize conversations about inequity, structural racism and other forms of oppression.

Some specific examples include:

a. Utilize United Way’s role as a convener to create trusted spaces for these conversations.

b. Add questions related to equity in your grant applications.

c. Build the capacity of more than one or a few individuals inside of your United Way to ensure that that messaging is communicated consistently and frequently.

RELATED CRITICAL SUCCESS FACTORS (MODERN UNITED WAY)

- Engage the Community in Solving Relevant Issues
- Deliver Awesome Experiences
- Best in Class Fundraising → Content → Digital Experiences→ Volunteer Opportunities



APPLYING AN EQUITY LENS

SAMPLE ACTIVITIES IN CHILDHOOD/YOUTH SUCCESS, ECONOMIC MOBILITY AND HEALTH

IMPACT AREA	SAMPLE ACTIVITIES
<div><div><div>A</div><div>B</div><div>C</div></div><div>CHILDHOOD SUCCESS</div></div> <div>Share disaggregated data with community residents on race and income disparities in reading proficiency rates. Create and communicate specific United Way goals and efforts that focus on closing these gaps with community residents and other key constituencies (e.g. donors, funded/unfunded partners, local companies).</div>	
<div>OUR PROPOSED ACTIVITY:</div>	

IMPACT AREA	SAMPLE ACTIVITIES
<div><div><div>Graduation cap and diploma</div></div><div>YOUTH SUCCESS</div></div> <div>Work with youth development organizations and other funded partners to develop an awareness campaign to build community understanding of the systemic barriers that low-income and/or students of color face that prevent them from graduating on time.</div>	
<div>OUR PROPOSED ACTIVITY:</div>	



IMPACT AREA	SAMPLE ACTIVITIES
<div><div><div>Piggy bank with dollar sign</div></div><div>ECONOMIC MOBILITY</div></div> <div>Sponsor a report or study examining historical patterns of housing discrimination and their present-day impact on the community. Share the results widely with key constituencies, including community residents, developers, housing advocates, and state and local legislators.</div>	
<div>OUR PROPOSED ACTIVITY:</div>	

IMPACT AREA	SAMPLE ACTIVITIES
<div><div><div>Heart with pulse line</div></div><div>ACCESS TO HEALTH</div></div> <div>Share national and community-level data on disparities in maternal mortality with all United Way funded health agencies and programs that serve pregnant women.</div>	
<div>OUR PROPOSED ACTIVITY:</div>	





# TAKE ACTION

## WHAT ARE OUR THREE PRIORITY STRATEGIES FROM THIS LEVER?

- 1.
- 2.
- 3.

## WHAT RESOURCES DO WE NEED TO SUCCESSFULLY EXECUTE THESE STRATEGIES?

## WHO DO WE NEED TO ENGAGE TO SUCCESSFULLY EXECUTE THESE STRATEGIES?

## WHO ON OUR TEAM IS RESPONSIBLE FOR IDENTIFYING NEXT STEPS IN EXECUTING THESE STRATEGIES?

## ADDITIONAL NOTES



# ACCELERATE YOUR EFFORTS

If you are already implementing all or most of the strategies listed above, consider adding some of these to deepen your awareness and communications efforts:



Create and share an equity commitment statement that acknowledges historical bias and creating a more equitable community as a north star. Being explicit in the history and conditions that created the need for equity work will invite deeper engagement and clarity in the work.



Create materials that are accessible, relevant, and meaningful to the community you're engaging. Think specifically about additional languages, and communication for those with visual or hearing impairment. Identify a diverse set of targets to connect with, then test the communication always asking, "Who is not represented here?"



Utilize current and established communication pathways as conduits of information-- including media outlets that serve communities of color, social media, faith-based, and community centers. Acknowledge that you may not know all existing pathways, and by investing in finding new platforms, relationships can be built.



Engage many different styles of learning such as play, visual activities, and stories to build awareness and motivate participation. Multi-dimensional communications will elicit more robust impact.



Democratize the process. Provide opportunities and spaces for community residents to leverage United Way communications channels to create their own narratives. A good example of this is United Way of the Greater Triangle's 10 to Watch effort, which has invested in The Beautiful Project to empower women of color to develop their own narratives through the use of photography.



Engage active resisters to develop a baseline of understanding of key disparities in their community. Working with unlikely partners to build mutual learning and connection will drive outcomes for a deeper equity experience. Radical inclusivity is a practice of equity.



Engage trusted corporate partners to build their awareness of community inequities and create solutions.

## UNITED WAY EXAMPLE

The *United Way of Anchorage* leads 90% Graduation by 2020, a community collaboration that coordinates partners, builds public will, mobilizes funding, and engages volunteers in the effort to reach a 90% graduation rate by the year 2020. A key component of the collaboration is the #NOLABELS media campaign, which challenges commonly held assumptions about students who struggle to graduate from high school. The campaign draws attention to the non-school barriers that some students face and asks everyone to look beyond the stereotypes that are traditionally associated with low income and/or students of color.



## UNITED WAY EXAMPLE

*United Way of Washtenaw County* is committed to equity as a core value and practice to advance its mission, fundamentally changing its approach to the work and the work itself. With the idea that zip code no longer predicts opportunity, one approach they are using to engage more individuals and make new connections is the 21 Day Equity Challenge. The 21 Day Equity Challenge is a self-guided learning journey with examples and tools that examine the history and impact of racism and how it shapes people's lived experiences in Washtenaw County. The Challenge was developed by Dr. Eddie Moore, Jr., Dr. Marguerite Penick-Parks, and Debby Irving. Over 4,000 people are participating in the challenge and new groups are connecting with United Way. The 21 Day Equity Challenge is one piece that builds momentum for the larger DEI work that includes getting involved in public policy, changing internal processes, and grantmaking processes



TRACK PROGRESS – SAMPLE SUCCESS MEASURES

SUGGESTED METRICS	WE ALREADY MEASURE THIS	WE WILL MEASURE THIS NOW/IN THE FUTURE	WE DON'T HAVE PLANS TO MEASURE THIS
# and % of United Way brand and marketing collateral that depicts diverse community residents in multiple roles - i.e. as volunteers, leaders, experts, donors, affinity group members, and not ONLY as recipients of United Way services			
# of United Way activities (convenings, forums, trainings) explicitly designed to raise awareness about historical discrimination, structural and/or institutional racism, and/or current inequities			
# of companies engaged (as part of United Way annual fundraising campaigns) to convey explicit messages about equity and related impact work			
# of individual donors engaged (as part of United Way annual fundraising campaigns) to share explicit messages about equity and related impact work			
# and % and type of segmented channels (social, print, and online media, television, radio, web-based, in-person) utilized to share United Way messaging, that predominantly reach and serve people of color and/or historically disadvantaged residents			
# and % of communications materials (print, digital, social) that explicitly address equity			
# and % of United Way Marketing and Communications staff from diverse backgrounds (race, ethnicity, gender, ability status, etc.)			
# of partners and agencies (funded/unfunded) engaged in United Way led/funded equity trainings			
# of community residents and volunteers engaged in United Way led/funded equity trainings			
# of corporate partners engaged in United Way led/funded equity trainings			
# of events co-planned and/or co-convened with organizations led by people of color			



HIGHLIGHTED RESOURCES

Talking About Race Toolkit  
Center for Social Inclusion

This toolkit contains customizable strategies that advocates can use as a guide for developing strategic organizational messaging, to advance racial equity.





# POLICY + ADVOCACY

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## RATIONALE

A core plank in how United Way engages individuals to be part of creating solutions is our policy and advocacy work at the community, state, and national levels. United Way Worldwide's Policy Agenda, developed for every new session of Congress, provides national visibility and a platform to advance the priority issues agreed upon by the United Way network. The most recent agenda for the 116th session of Congress focused explicitly on strengthening and/or expanding access to programs to help close gaps in education, economic mobility, and health.

Many local United Ways have a long history of engaging in policy and advocacy work at the community and state level. This is aided by our infrastructure, which includes 32 state associations, some of whom work closely with the United Ways in their respective states to build and advance a common state policy agenda. Examples include the United Ways of Pennsylvania, Texas, and Florida. Across the network, United Way state policy agendas have commonly focused on improving access to high-quality early childhood programs and full-day kindergarten in education, expanding access to preventative services in healthcare, and expanding affordable housing. Other issues, like advocating for a minimum wage, closing gaps in education spending, or regulating predatory lending practices, are often specific to a particular state and local context.

Policy has a tremendous impact on individual and community outcomes because it shapes everything from the physical shape of our communities and cities to the allocation of resources. Advocating for policy change is one of the major tools that United Ways have to create systems-level change. Policy change can align and complement the strategic investments made in the community and has more potential to impact greater numbers of people than direct services.

Nearly every social and community inequity has roots in a policy or policies that disadvantaged some groups and benefited others. In the US, the burden of inequitable policies has significantly impacted communities of color and low-income communities. Given this reality, utilizing this lever is critically important for redressing previous wrongs, and scaling equitable change in education, economic mobility, and health.





STARTING POINT – TAKE STOCK!

Assess your United Way’s progress against the indicators below to understand areas of strength and areas of challenge related to how you are currently using policy and advocacy to drive equity. Use your scores to identify and prioritize strategies and action steps (see next sections) to deepen and accelerate your awareness and communication efforts.

POLICY AND ADVOCACY	5	4	3	2	1	?
	ALWAYS	OFTEN	SOMETIMES	RARELY	NEVER	UNSURE
Our United Way analyzes indicators with significant disparities to understand underlying, “root” causes.						
Our United Way analyzes indicators with significant disparities to determine policy and advocacy priorities.						
Our United Way advocates for specific state and local policies in childhood and youth success, economic mobility, and health that have the greatest potential for closing gaps.						
Our United Way engages community residents to identify which policies are important to them.						
Our United Way leverages our brand and network to emphasize the importance of equity in policy to policymakers.						
Our United Way shares data on state and local policies that have disparate impacts based on race/ethnicity, gender, sexual orientation, income level, and ability status with our networks (i.e. other United Ways in our state, community partners, coalitions, advocacy groups).						
Our United Way honestly assesses where equitable policies may conflict with the interests of our donors and funders, and fosters discussion about that tension.						
TOTAL:	___ / 35					

DETERMINE YOUR PATH FORWARD – SUGGESTED STRATEGIES

Local United Ways have a unique role in advancing equity through policy and advocacy. Below are a number of strategies to advance equity via this lever:

Conduct underlying analysis of indicators with significant disparities. Be sure to disaggregate by race and ethnicity and use it to inform what kinds of policies are addressing root causes.

**Example:** If your community is experiencing significant displacement of communities of color, identify which local and state policies might be driving those inequities (e.g. weak renter protections) or might help mitigate those disparities (e.g. financial assistance for first-time homeowners).

Seek non-traditional strategic partners who may be developing and implementing equitable policy or strategies.

**Example:** While your focus may be on homeownership as a pathway to economic advancement, your community may be facing rapid displacement because of weak renter protections. Perhaps partner with organizations promoting community land trusts as a strategy to drive economic opportunity.

Engage community residents to identify which policies are most important to them. Engage in inclusive processes with the community to identify where they are feeling the most pressure and work with advocacy organizations focused on equity to understand where there are opportunities to leverage policy change.

Empower and increase the capacity of residents, especially those from historically disadvantaged communities, to advocate for policy change. Your United Way can leverage the expertise that you have developed as a result of working on policy issues, and engaging with local and state coalitions and lawmakers, to provide training, resources, and tools to community residents. This can strengthen their efforts so that their voices are effective in advocating for policy change.

Leverage United Way’s brand and network to emphasize the importance of equity in policy with policymakers. You may not need to take a specific policy stance, but your United Way can play a role in normalizing equity as a priority across all policy issues.

Seek funding that can support effective and impactful policy advocacy. Think outside of traditional channels. Seek funding that supports mobilizing community members to advocate for policy, such as promoting voter registration and civic participation.

Share data on specific state and local policies that have inequitable impacts on different populations in your community. Work with universities, local advocacy organizations, or policy think tanks to list the pros and cons of a given policy on specific target populations, especially those who have been historically disadvantaged. Use existing resources, like Policy Link’s Equity Atlas, to understand the greatest sources of inequity in your community and to drive the development of local advocacy efforts and inform state-level policy agendas.

RELATED CRITICAL SUCCESS FACTORS (MODERN UNITED WAY)

- Develop Compelling Products and Solutions
- Engage the Community in Solving Relevant Issues



APPLYING AN EQUITY LENS

SAMPLE ACTIVITIES IN CHILDHOOD/YOUTH SUCCESS, ECONOMIC MOBILITY AND HEALTH

IMPACT AREA	SAMPLE ACTIVITIES
<div><div><div><div>A</div><div>B</div><div>C</div></div><div>CHILDHOOD SUCCESS</div></div></div>	<div><div>• Advocate for state funding of programs that increase early access to high-quality learning opportunities and close readiness gaps, including Pre-K for 3- and 4-year-olds and/or full-day kindergarten. Prioritize Pre-K funding for low-income counties and cities.</div><div>• Advocate for increased professional development resources for informal care settings and home visiting programs that historically serve higher proportions of low-income and/or children of color.</div></div>

OUR PROPOSED ACTIVITY:

IMPACT AREA	SAMPLE ACTIVITIES
<div><div><div><div><div></div><div></div></div><div>YOUTH SUCCESS</div></div></div></div>	<div><div>• Advocate for school district policies designed to increase access to rigorous, college preparatory curriculum (i.e. Advanced Placement, International Baccalaureate, talented, and gifted) for students of color.</div><div>• Review district and school-level data to identify disparities in school suspensions and expulsions. Advocate for policies that require implicit bias training to address disparities in discipline referrals and for alternative practices to address student behavior issues that do not force students out of school wherever possible.</div></div>

OUR PROPOSED ACTIVITY:

IMPACT AREA	SAMPLE ACTIVITIES
<div><div><div><div><div></div><div></div></div><div>ECONOMIC MOBILITY</div></div></div></div>	<div><div>Consider advocating for Opportunity Zones, or other economic growth strategies that, if designed and implemented equitably, can foster job growth, provide livable wages, ensure access to affordable housing, and avoid displacement of low-income residents living in communities targeted for investment.</div></div>

OUR PROPOSED ACTIVITY:

IMPACT AREA	SAMPLE ACTIVITIES
<div><div><div><div><div></div><div></div></div><div>ACCESS TO HEALTH</div></div></div></div>	<div><div>Advocate for local planning commissions and elected officials to set requirements for new developments including walkable paths/sidewalks, trails, bike paths, playgrounds, physical fitness facilities, and other green spaces as part of proposed residential building plans, especially those targeted for subsidized housing and/or placed in low-income communities.</div></div>

OUR PROPOSED ACTIVITY:





# TAKE ACTION

## WHAT ARE OUR THREE PRIORITY STRATEGIES FROM THIS LEVER?

- 1.
- 2.
- 3.

## WHAT RESOURCES DO WE NEED TO SUCCESSFULLY EXECUTE THESE STRATEGIES?

## WHO DO WE NEED TO ENGAGE TO SUCCESSFULLY EXECUTE THESE STRATEGIES?

## WHO ON OUR TEAM IS RESPONSIBLE FOR IDENTIFYING NEXT STEPS IN EXECUTING THESE STRATEGIES?

## ADDITIONAL NOTES



TRACK PROGRESS – SAMPLE SUCCESS MEASURES

SUGGESTED METRICS	WE ALREADY MEASURE THIS	WE WILL MEASURE THIS NOW/IN THE FUTURE	WE DON'T HAVE PLANS TO MEASURE THIS
# and % of policies on your United Way's policy agenda that explicitly address equity			
# of policies promoted, advocated and supported by your United Way led by other coalitions/groups that explicitly address equity			
# of policymakers your United Way has engaged about equity, including sharing key indicators with significant disparities and/or discussing state and local policies that are having inequitable impacts on different populations in your community			
# of state and/or local policymakers who vote in alignment with your policy agenda items on equity			
# of equity-specific policies promoted/supported/advocated for by your United Way that have been passed by your state legislature/ local governing body			
# of coalitions that your United Way is leading and/or partnering with that are focused on increasing equity through specific policy priorities (housing, early childhood, post-secondary, workforce development)			
\$ amount and % of total United Way budget devoted to policy and advocacy efforts (including staff)			
# and % of United Way Policy and Advocacy staff from diverse backgrounds (race, ethnicity, gender, ability status, etc.)			



HIGHLIGHTED RESOURCES

Get Ready: Build the Base for Equity Advocacy Policy Link

This toolkit offers important benchmarks for advocates to BUILD THE BASE for equitable change. Equity advocacy benchmarks (the 'mile markers' in campaigns for policy change) can be useful for charting the course of a new advocacy effort, providing feedback on the progress of an existing one, and reporting on the success of a completed campaign.





LEVER

# FUNDRAISING, RESOURCE ALLOCATION + GRANTMAKING

## RATIONALE

A core part of United Way's work is fundraising and distributing those resources back into the community to create positive change. Historically, most United Ways accomplished this through a traditional allocations process that distributed money to community-based organizations that provided direct services and support to residents that addressed community needs (e.g. homelessness, high school graduation, and obesity). In the past two decades, many United Ways have shifted to an impact model to achieve greater impact than could be realized through direct services alone. In a community impact-driven model, United Ways strategically distribute resources in the community based on established shared community (or United Way) goals, issue priorities, and specific strategies. Also, funded entities are increasingly expected to report on results, often against common impact measures developed by the local United Way with community partners. In addition to making more strategic investments in the community, impact-oriented United Ways employ additional strategies to accomplish goals, including policy and advocacy, convening, community engagement, local capacity building, and leading cross-sector partnerships.

A market-driven impact model builds on this evolution by acknowledging the importance of engaging donors at every step of this process, so that they have opportunities to help shape the work, are invested in the solutions, and are willing to devote resources to support them. United Ways vary in the extent to which they are implementing a market-driven impact model, often based on local relationships, internal capacity, and buy-in needed to make this shift, and the support/willingness of funded partners to envision

a different relationship with their United Way. Yet, United Ways that are making this shift are in a strong position to leverage their fundraising and strategic investments as levers for increasing equity.

Ensuring that the intent to address inequities within the community informs your United Way's financial decisions, is critical to advancing equity. Examining (and adjusting as needed) internal financial processes, focusing on equity-centered grantmaking and community capacity-building to improve the readiness of partner organizations, are ways that United Ways can model best practices and lead on this issue.

When we discuss fundraising, resource allocation, and grantmaking as it relates to equity it is important to articulate how power dynamics interact within and across funder relationships and partnerships. The definition of power is the capacity of an individual or group to influence the behavior of others. One of the hallmarks of power is access or control of resources. Therefore, knowing the ways that power can enhance or undermine relationships, strategies, and ultimately outcomes, is an equity imperative when committing to centering equity in fundraising, resource allocation, and grantmaking. By adopting an equity frame in the distribution of resources, United Ways can demonstrate a deep commitment to dismantling one of the most significant impediments to collective prosperity.



Knowing the ways that power can enhance or undermine relationships, strategies, and ultimately outcomes, is an equity imperative when committing to centering equity in fundraising, resource allocation, and grantmaking.





THERE ARE SEVERAL LAYERS TO CONSIDER AS IT RELATES TO FUNDRAISING, RESOURCE ALLOCATION, AND GRANTMAKING FOR UNITED WAYS UNDERTAKING EQUITY EFFORTS:

### FUNDRAISING AND DONOR ENGAGEMENT

While leaning into equity might be viewed as a risky proposition in terms of losing existing donors who have no interest in this issue, it is also an opportunity to engage new donors for whom the United Way is not seen as relevant. There also exists the chance to bring along existing donors, if you can make a compelling case in a way that connects to their stated interests. United Ways also have an opportunity, because of our relationships with donors, to build their awareness of inequities of which they may be unaware of and/or inadvertently contributing.

### GRANTMAKING

United Ways have perhaps the greatest opportunity to demonstrate a commitment to equity in our role as grantmakers. Equity should be intentional in all aspects of your grantmaking, including the design and execution of your processes, the type of community investments you prioritize, and the specific data your United Way tracks over time. This includes taking equity into account when making decisions about providing operational and/or programmatic funding, determining the level of flexibility in the use of funds, and the duration of grants.

### RESOURCE ALLOCATION

Examining your United Way’s resource allocation patterns presents an opportunity to consider how your operational budgets align with your commitment to equity. This includes determining the extent to which the value and practice of equity are visible in your organizational funding practices. Examples of this include allocating internal resources for certain aspects of programmatic work such as data gathering and analysis, staffing strategies, internal staff development or technology that improves community engagement.



STARTING POINT – TAKE STOCK!

Assess your United Way’s progress against the indicators below to understand areas of strength and areas of challenge related to how you are currently leveraging resources and your role as both a fundraiser and grantmaker, to create more equitable approaches to your impact work. Use your scores to identify and prioritize strategies and action steps (see next sections) to deepen and accelerate your data collection efforts.

FUNDRAISING, RESOURCE ALLOCATION + GRANTMAKING	5	4	3	2	1	?
	ALWAYS	OFTEN	SOMETIMES	RARELY	NEVER	UNSURE
Our United Way prioritizes advancing equity in the weighing of our grantmaking, resource allocation, and partnership decisions.						
Our United Way collects demographic data on donors.						
Our United Way develops outreach strategies for engaging new donors and leverages existing United Way affinity groups to do so.						
Our United Way engages key community constituencies to inform the grantmaking process.						
Our United Way prioritizes equity by removing funding barriers for organizations that are led by individuals who have been historically underrepresented in leadership positions, including people of color (POC), women, and individuals with disabilities.						
Our United Way prioritizes equity by removing funding barriers for organizations that are explicitly focusing on advancing equity by closing disparities that are based on racism, sexism, ability status, and income level.						
Our United Way promotes diversity, equity, and inclusion in our procurement policies for vendors we directly hire.						
TOTAL:	___ / 35					



# DETERMINE YOUR PATH FORWARD – SUGGESTED STRATEGIES



Prioritize advancing equity in how you weight your grantmaking, resource allocation, and partnerships decisions. One significant way to demonstrate the importance your United Way places on equity is to include this as a criterion and give it a weighted value in all of your major monetary and strategic decisions. This includes how you structure your grantmaking process (and decision-making), deciding what partners you will engage with (funded and unfunded), and how you make decisions about allocating resources internally to advance equity.



Balance grantmaking to ensure a mix of investments that focus on long-term, systemic and equitable change and programs that provide direct services and supports to individuals and/or address basic needs. Grants that focus on efforts to change community conditions, when combined with addressing specific disparities, can help to deliver equitable change at a broader scale and complement investments in direct services and supports. For example, funding a coalition that is working to increase access to affordable housing for low-income community residents is a great way to augment investments in temporary shelters that can only provide short-term relief.



Collect demographic data on donors. Identify gaps and develop outreach strategies for engaging new donors, including leveraging existing United Way affinity groups (e.g. LGBTQ, African American, Young Leaders), and those that are community-based or have local chapters (e.g. 100 Black Men, Society of Hispanic Engineers, National Society of Black Engineers).



Remove funding barriers for smaller organizations, especially those led by people of color, women, and other historically disadvantaged groups. Assess application requirements and potentially simplify specific barriers, such as unnecessarily high financial reporting requirements.

**Example:** Applications that require audit level detail vs. more simplified measures of financial sustainability may place an unnecessary burden on smaller or systematically under-resourced organizations. Promote collective impact projects that leverage resources and partnerships among numerous organizations. Provide substantive feedback to applicants who do not receive funding so that they can improve their chances next time.

Consider creating a specific pool of resources and/or training for unsuccessful applicants to build their capacity to successfully compete for funding in subsequent rounds of grantmaking.



Engage diverse community members and local organizations to inform the grantmaking process. Provide them with training that helps to deepen their understanding of equity to build their capacity to bring that lens to the grants review process. Work with them to establish community priorities to consider in the selection of grantees.



Promote grantee diversity and equity by prioritizing organizations that are led by people of color and/or are explicitly focusing on advancing equity with communities of color. Incorporate questions into application processes for grantees to describe how their work leads to equitable outcomes for communities.



Promote and invest in strengthening the internal equity capacity of grantees. Set aside budget dollars earmarked for grantees to provide comprehensive equity training for organization board, leadership, staff, and volunteers. Provide general operating funds to organizations.



Track vendor demographics and adopt policies that promote vendor diversity. In conjunction with investments in hiring and retaining diverse staff, ensuring your vendors are representative of the communities you are serving is a great way to demonstrate a commitment to equity and inclusion.



Focus on sustained, incremental change. Support grassroots organizations that focus on policy change. Meaningfully shape investments and policy decisions in your local community and support the development of formal pipelines to decision-making such as civic engagement. Provide sustainable funding that considers the complexity and timeline of systems change.



## RELATED CRITICAL SUCCESS FACTORS (MODERN UNITED WAY)

- Lead with a Growth Mindset
- Best in Class Fundraising → Content → Digital Experiences → Volunteer Opportunities
- Develop Compelling Products and Solutions





# ACCELERATE YOUR EFFORTS

If you are already implementing all or most of the strategies listed in the previous section, consider adding some of these to deepen your fundraising, resource allocation, and grantmaking efforts:



Set and share standards for equity funding resources. Research the origins of capital and funding with an equity frame.



Assess the extent to which current funding sources align with your organizational commitment to equity. Identify conflicts and determine if misalignment requires a change of course.



As needed, work to diversify fundraising teams (corporate, philanthropic, individual) so that they reflect the full spectrum of the community and can also leverage their personal networks to support revenue goals.



Create opportunities for participatory grantmaking processes where community residents co-create the grantmaking process and drive decisions about the strategic investment of resources in the community.



Work to create funding collaboratives to amplify the impact of giving.



Set specific goals related to increasing awareness and giving from donors of color (e.g. African American affinity groups).



Create mechanisms for delivering resources to new partners. Consider a rapid response fund.



## UNITED WAY EXAMPLE

*United Way of Greater Atlanta (UWGA)* launched the African American Partners affinity group in 2000 to proactively engage members of the African American community who were historically under-represented in United Way's giving societies. Members give \$1,000 annually and UWGA provides the group opportunities for networking, advocacy, and volunteerism. In recent years AAP members and UWGA staff identified working with African American male youth in Atlanta as a priority. Members help plan and staff volunteer events, including a day of service to address summer slide, STEM workshops that involve local companies (AT & T, Delta, Georgia Power) and pair youth with AAP mentors for the day. In 2016, over 1,000 members donated \$2.2 million to the United Way of Greater Atlanta.

## UNITED WAY EXAMPLE

Five years ago, *United Way of Southeast Louisiana* embarked on a journey to determine its relevance in its seven-parish service area. Over sixty community conversations brought to light that poverty had to be viewed through the lenses of equity, racism, and family. As a result, United Way of Southeast Louisiana co-developed the Blueprint for Prosperity with thought partners. The Prosperity Dashboard tracks the progress of population-level equity indicators in the Blueprint for Prosperity. The Prosperity Dashboard is available at <https://www.unitedwayseladashboard.org/>. In the 2018 program grant process, agencies were given the option to earn extra points by completing an equity audit. Ninety-eight percent of applicants completed the equity audit. Twenty new partners received funding and were allowed to have a fiscal agent in the grant cycle, including partners who may not have received funding in the past. Looking forward, United Way of Southeastern Louisiana is seeking funding to support an Equity Cohort for agencies to learn and grow together.

## UNITED WAY EXAMPLE

"10 to Watch" is a strategic investment opportunity that creates exclusive funding for historically underrepresented and under-resourced nonprofit leaders and their organizations. Through an analysis of its partner portfolio, *United Way of the Greater Triangle (UWGT)* determined that people of color (African American and Hispanics) represented 85% of those served through our Impact investing. However, less than 20% of the organizations UWGT invested in were led by people of color. Additional analysis revealed that organizations led by men possessed three times the assets of organizations led by women. 10 to Watch begins to address these disparities. In addition to a two-year commitment of unrestricted dollars (\$500K in total), 10 to Watch participants benefit from leveraging UWGT's access to boardrooms and decision-making tables. By participating in conversations held in rooms they normally would not be in, the outcomes are broader networks, broader influence, and broader visibility. 10 to Watch leaders are more connected to the Triangle's philanthropy ecosystem, resulting in increased revenue and relationships. Lastly, through a partnership with Leadership Triangle, a premier leadership development organization, leaders have the opportunities to build the personal leadership abilities all leaders need to be successful.




APPLYING AN EQUITY LENS

SAMPLE ACTIVITIES IN CHILDHOOD/YOUTH SUCCESS, ECONOMIC MOBILITY AND HEALTH

IMPACT AREA	SAMPLE ACTIVITIES
<div><div><div><div>A</div><div>B</div><div>C</div></div><div>CHILDHOOD SUCCESS</div></div></div> <div><ul style="list-style-type: none"><li>• Prioritize funding for early childhood programs that serve historically disadvantaged and/or low-income residents.</li><li>• Set aside additional resources to support professional development and training for informal daycare providers in low-income communities of color (i.e. family, friend and neighbor care) and address potential barriers to participation (time of day, transportation childcare, location).</li></ul></div>	


OUR PROPOSED ACTIVITY:

IMPACT AREA	SAMPLE ACTIVITIES
<div><div><div><div></div><div>YOUTH SUCCESS</div></div></div><div><ul style="list-style-type: none"><li>• Leverage existing affinity groups (such as African American, Young Leaders) to volunteer their time (e.g. as mentors) and to financially support United Way and other programs that serve youth of color and/or those attending high-poverty, low-performing schools.</li><li>• Prioritize grant funding for quality programs and initiatives that support low-income and/or youth of color when they are not in school including academic enrichment (e.g. STEM programs), career exposure, internships mentoring, tutoring, and summer programs.</li></ul></div></div>	

OUR PROPOSED ACTIVITY:

IMPACT AREA	SAMPLE ACTIVITIES
<div><div><div><div></div><div>ECONOMIC MOBILITY</div></div></div><div><ul style="list-style-type: none"><li>• Invest in efforts that serve historically disadvantaged and/or low-income populations and are intended to promote the long-term social and economic mobility of participants (e.g. certification, licensing or employment programs, small business development, home ownership initiatives).</li></ul></div></div>	

OUR PROPOSED ACTIVITY:

IMPACT AREA	SAMPLE ACTIVITIES
<div><div><div><div></div><div>ACCESS TO HEALTH</div></div></div><div><ul style="list-style-type: none"><li>• Fund efforts that are based in low-income and/or communities of color that promote health by investing in healthy spaces such as community gardens, open play areas, walkable trails, bike paths, accessible transportation systems, mobile health clinics, and community schools.</li><li>• Provide resources to community-based physicians and clinics that support early childhood development, maternal health, and work to recognize the signs of child trauma/adverse childhood experiences.</li></ul></div></div>	

OUR PROPOSED ACTIVITY:







# TAKE ACTION

WHAT ARE OUR THREE PRIORITY STRATEGIES FROM THIS LEVER?

- 1.
- 2.
- 3.

WHAT RESOURCES DO WE NEED TO SUCCESSFULLY EXECUTE THESE STRATEGIES?

WHO DO WE NEED TO ENGAGE TO SUCCESSFULLY EXECUTE THESE STRATEGIES?

WHO ON OUR TEAM IS RESPONSIBLE FOR IDENTIFYING NEXT STEPS IN EXECUTING THESE STRATEGIES?

ADDITIONAL NOTES



TRACK PROGRESS – SAMPLE SUCCESS MEASURES

SUGGESTED METRICS	WE ALREADY MEASURE THIS	WE WILL MEASURE THIS NOW/IN THE FUTURE	WE DON'T HAVE PLANS TO MEASURE THIS
# and % of investments that explicitly address equity (closing persistent gaps, addressing historical disparities)			
# and % of donors disaggregated by race, gender, age, etc.			
# and % change in giving (annually) disaggregated by donor race, gender, etc.			
# of donors in affinity group giving (African American, Women Leaders, LGBTQ, LINC, etc.)			
\$ amount and % change (annually) of giving by affinity groups (African American, Women Leaders, LGBTQ, LINC, etc.)			
# and % of United Way Resource and Development staff from diverse backgrounds (race/ethnicity, gender, sexual orientation, income level, ability status)			
# of vendors contracted by United Way that are owned/led by people of color and/or representative of the community demographic makeup			
\$ amount and percent of overall grant applications submitted by organizations led by people of color			
\$ amount and percent of overall grants awarded to organizations led by people of color			



HIGHLIGHTED RESOURCES

Grantmaking with a Racial Justice Lens, An Introduction  
Philanthropic Initiative for Equity

This guide helps surface how to advance racial equity in philanthropy, aiming to make it a core practice and goal of grantmakers.





LEVER

# LOCAL CAPACITY BUILDING

R

## ATIONALE

Driving equitable outcomes in a community requires a shared commitment to closing disparities and inequities, collaboration across organizations, and the strategic alignment of efforts. Local United Ways can play a unique role in building the capacity of community partners to engage in deeper equity work to drive community-level equity outcomes. United Ways already have a history of investing in the capacity of programs and funded agencies to deliver high-quality programs. This often includes investing in staff development and training, nonprofit operational capacity including financial and IT processes, and strengthening the ability of funded programs and agencies to fundraise. Also, United Ways already leading coalitions and collective impact efforts in their communities have credibility, positioning, and experience working cross-sector with diverse organizations to align partner goals, programmatic efforts, and results.



**Community-based nonprofit leadership and staffing can suffer from the same lack of diversity, inclusion, and bias that challenges other sectors. Leadership and staff may not reflect or reside in the communities they serve. Investing in, or directly providing training to uncover implicit bias is a way to increase awareness and the potential adoption of strategies that address community needs.**



**GIVEN THE MANY COMPETING PRIORITIES WITHIN AND ACROSS ORGANIZATIONS, ENSURING THAT INDIVIDUAL ORGANIZATIONS CAN FOCUS EXPLICITLY ON EQUITY IS A CORE STRATEGY. UNITED WAY'S HISTORY OF CAPACITY INVESTMENTS AND COALITION LEADERSHIP CAN BE DIRECTED TOWARDS EQUITY IN SPECIFIC WAYS:**

- **Leveling the playing field between community-based nonprofits** - Directing capacity-building investments intentionally towards small and/or organizations led by people of color. United Ways, like Metropolitan Dallas, are investing in increasing the financial and marketing acumen of grassroots organizations, especially those with leaders and owners/operators who are women, people of color, or both (see case study below). This can help these organizations compete in a more level playing field with larger, longstanding, and well-resourced organizations for foundation and government grants and contracts, many of whom require stringent financial practices.
- **Investing and facilitating opportunities for funded partners and agencies to increase their equity "muscle."** Community-based nonprofit leadership and staffing can suffer from the same lack of diversity, inclusion, and bias that challenges other sectors. Leadership and staff may not reflect or reside in the communities they serve. Investing in, or directly providing training to uncover implicit bias is a way to increase awareness and the potential adoption of strategies that address community needs. This can help staff to better understand the histories of the communities they serve, and how they can institute more equitable practices in their community-facing work.

- **Democratizing the grantmaking process.** Some United Ways have decided to create more "ground-up" grant-making processes that empower residents to drive how United Way's resources will be invested to meet priorities as identified by the neighborhoods themselves. A good example of this is United Way of Metropolitan Chicago's Neighborhood Networks Program.
- **Building the capacity of individuals, especially women and/or people of color, who are leading small organizations.** United Ways can invest in leaders themselves, including providing professional development opportunities and connecting leaders of color to networks and opportunities that they might not be aware of or have access to. A good example of this is United Way of the Research Triangle's 10 to Watch Program.
- **Engaging this process across partners creates the ability to drive an equity agenda towards creating multi-level change in all the work impacting communities, partners, and staff.** Because the United Way operates as a network of individual organizations, efforts to build skills across the network and within community partnerships will be essential to the success of this effort.





STARTING POINT – TAKE STOCK!

Assess your United Way’s progress against the indicators below to understand areas of strength and areas of challenge related to how you are currently building community capacity by closing gaps and inequities between local non-profit organizations. Use your scores to identify and prioritize strategies and action steps (see next sections) to deepen and accelerate your data collection efforts.

LOCAL CAPACITY BUILDING	5 ALWAYS	4 OFTEN	3 SOMETIMES	2 RARELY	1 NEVER	? UNSURE
Our United Way regularly reviews our internal resource investment and grantmaking processes to identify barriers and funding inequities between well-established, large nonprofits, and smaller organizations, especially those led by people of color and/ or women.						
Our United Way makes strategic investments to build the capacity of local nonprofit leaders, especially women and/or people of color who are focused on networking, professional development, mentorship, and opportunities for continued growth.						
Our United Way uplifts and amplifies partners and businesses demonstrating their commitment to equity.						
Our United Way engages high-level leadership to communicate and reinforce an organizational commitment to equity.						
Our United Way builds the capacity of grantees and partner organizations to make equity a strategic and operational priority.						
TOTAL:	___ / 25					

DETERMINE YOUR PATH FORWARD – SUGGESTED STRATEGIES

Generate and implement tools and analysis to uncover equity gaps. Some examples include:

- Review grant application content, design, and specific processes for outdated or prohibitive steps.
- Review hiring processes and adapt to include equity principles, including vendors.
- Review annual investments and measure alignment in initiatives and programs that focus on root causes and closing gaps.

Use partnerships and leverage brand and vision for a Modern United Way to advocate with partners for equity investments. This could include influencing business developers or local decision-makers to fund markets or invest in policies that mitigate disparities and joining coalitions that are committed to moving the equity conversation forward toward action. Develop and disseminate tools to support local partners and businesses to better embody equity.



Uplift and amplify community partners and businesses that are demonstrating their commitment to equity. Capture examples and best practices that are relevant to your local context and share with organizations that could use further guidance.

Build the capacity of grantees and partner organizations. Support them in creating equity action plans to address existing disparities in hiring, promotions, retention, operations, and programming. Directly provide or invest in training for grantee organizations’ leadership and staff.

Demonstrate commitment by engaging high-level leadership to communicate and reinforce an organizational commitment to equity. Create and deliver the return on investment for equity work. Model how prioritizing equity has created new opportunities and moved forward United Way impacts and return on investment.

RELATED CRITICAL SUCCESS FACTORS (MODERN UNITED WAY)

- Model Diversity, Equity and Inclusion
- Lead with a Growth Mindset



# ACCELERATE YOUR EFFORTS

If you are already implementing all or most of the strategies listed above, consider adding some of these to deepen your local capacity-building efforts:

**Revisit and consider what your capacity expectations are and if that's something your United Way can take on:**

**Example:** Access to a database versus having to own and manage their own database. Think outside of the box.

**Hold funded agencies and partners accountable for agreed-upon equity practices and outcomes. Building local nonprofit capacity to become more equitable should be paired with increased expectations to manifest those learnings in organizational policy and practice over time. Work with funded agencies and partners to get their input on equity metrics that can be agreed upon. What gets measured gets done.**

**Your United Way can identify which capacity-building approaches are most relevant for your local context and develop metrics to evaluate your adherence to investing in those established baselines with partner organizations and track progress over time.**

**Example:** A grantee organization is struggling to retain staff of color, your United Way can support the grantee organization in manager and senior leader skill-building and, over time, begin to report on agreed upon Sample Success Metrics (e.g. retention rates disaggregated by race).

**Consider what you can stop doing once that capacity is built in the network and identify where you want to focus your efforts next.**



**For United Ways, understanding what key capacities might drive the greatest impact in terms of equity can inform grantmaking and resource allocation strategies.**



**Equity practitioners have identified several specific focus areas or leverage points for capacity-building that are most effective in driving equitable culture and practice.<sup>14</sup>**

- Data that could include building organizational capacity to collect and analyze data with equity metrics in mind and incorporate that data into strategy development and decision-making. United Ways can support network partners in building that internal capacity or play a role in data collecting and sharing.
- Organizational Culture can include investments made in the learning and development of staff to effectively embody and advocate for equity both within their organizations and externally with the community.
- Board of Directors which can include deepening their understanding of equity and their capacity to make strategic, informed, and empathetic decisions that drive greater equity, diversity and inclusion.
- Managers and Senior Leaders which can include focusing on the development of empathetic management skills that drive greater staff retention, more diverse hiring, and inclusive decision-making.
- Organizational and Fiscal Health which can include not only building the capacity of local organizations to be more fiscally stable by shoring up systems and processes, but also grantmaking at a level that helps create that sustainability, and exploration of other revenue generation models (e.g. endowments, fee-for-service).

<sup>14</sup> <https://www.equityinthecenter.org/wp-content/uploads/2019/04/Equity-in-Center-Awake-Woke-Work-2019-final-1.pdf>



# UNITED WAY EXAMPLE

United Way of Central Carolinas leads two initiatives to increase equity and support new partners across the region. Following civic unrest in 2016, United Way and other community partners raised funds for Unite Charlotte to provide community grants to increase access to smaller grassroots organizations. An entire grant cycle was devoted to capacity building to increase opportunities for longer-term funding as one step in recognition of the time it takes to nurture and foster strong relationships. United Way also began working to transform and revitalize neighborhoods through United Neighborhoods while using real-time feedback from community members to inform initiatives, with the aspirational goal of being 100% resident-led. They have had conversations with their traditional partners about race and equity which strengthened their business ties. These two new strategies have created more access for local grassroots organizations, capacity building, and racial equity trainings to organizations.



# UNITED WAY EXAMPLE

United Way of Metropolitan Dallas (UWMD) is exploring how to support communities that are largely served by grassroots organizations. These organizations, with tremendous historical and community knowledge, lacked access to the philanthropic sector due to structural barriers such as audited financials, insurance, or basic marketing. By partnering with the University of North Texas at Dallas and the State Fair of Texas, UWMD convened a 6-month, 40-hour course that culminated in a Pitch Day for capacity-building grants. 90% of the organizations were minority-led, 90% of the organizations were women-led, and funding allowed agencies to invest in financial audits and marketing materials. This capacity-building work is making a difference in ensuring equitable opportunity and access to grassroots organizations, many of which are women and minority-owned and operated. The current and anticipated results are inclusive of putting organizations in a position where they can effectively apply for and secure funding from larger entities to expand their organizational scope and impact capacity. We learned that executive directors of small nonprofits generally don't have the time or capacity to attend trainings, and this opportunity provided them with space and time to think strategically about their work. Through the utilization of resources such as collective partnership impact, organizational capacity building, and leveraging relationships, United Way Metropolitan Dallas was reminded of the importance that creating equitable spaces for grassroots organizations in ensuring an inclusive landscape within the nonprofit sector.

# UNITED WAY EXAMPLE

In 2018, United Way of Central Ohio merged two programs focused on supporting diverse nonprofit board leadership. Project Diversity Pride Leadership is a training program with an intense six-month curriculum to prepare racial/ethnic minorities and people in the LGBTQ+ community to be effective nonprofit board members. A survey conducted by United Way of Central Ohio in 2019 confirmed central Ohio nonprofit boards are not diverse in comparison to county demographics. As a result, a goal has been set for nonprofit boards to reflect county demographics by 2025. Research has confirmed the best decisions are made when everyone has a seat at the table and can contribute diverse perspectives. Project Diversity Pride Leadership has more than 700 graduates with over 65 percent having served or currently serving on nonprofit boards. Local companies are actively involved by identifying associates to participate and represent the organization through its corporate social responsibility. United Way of Central Ohio's Neighborhood Leadership Center also invests in the capability of its residents to lead the change in their communities. ecosystem, resulting in increased revenue and relationships. Lastly, through a partnership with Leadership Triangle, a premier leadership development organization, leaders have the opportunities to build the personal leadership abilities all leaders need to be successful.





APPLYING AN EQUITY LENS

SAMPLE ACTIVITIES IN CHILDHOOD/YOUTH SUCCESS, ECONOMIC MOBILITY AND HEALTH

IMPACT AREA	SAMPLE ACTIVITIES
<div><div><div><div>A</div><div>B</div><div>C</div></div><div>CHILDHOOD SUCCESS</div></div></div> <div><ul style="list-style-type: none"><li>• Review your state’s early childhood professional development, career pathways, and certification standards to determine the extent to which equitable access exists. Work as part of your state’s early childhood coalition to come up with policy solutions to address any existing inequities.</li><li>• Identify barriers for attaining early childhood credentials faced by individuals living in under-served communities. Partner with local community colleges and invest in efforts that address those barriers (e.g. transportation, childcare, emergency loans).</li><li>• Partner with state and local early childhood coalitions to ensure that informal caregivers (i.e. family, friends, and neighbor care) have equal access to training, professional development, and licensing programs, especially those that serve low-income and/or communities of color.</li></ul></div>	

OUR PROPOSED ACTIVITY:

IMPACT AREA	SAMPLE ACTIVITIES
<div><div><div><div><div></div><div></div><div></div></div><div>YOUTH SUCCESS</div></div></div><div><ul style="list-style-type: none"><li>• Advocate for the placement of highly qualified teachers in low-performing schools and/or schools with high rates of poverty (which often disproportionately serve students of color). Also, advocate for teacher recruitment policies that focus on increasing the diversity (e.g. race and gender) of the teaching force that reflects the students they serve.</li><li>• Consider serving as the fiscal agent or offering other types of operational support (e.g. office space, shared staffing, supplies, meeting room space), for out-of-school time coalitions that are led by people of color and/or serve low-income and/or youth of color.</li><li>• Partner with schools to co-sponsor trainings for teachers and administrators that focus on recognizing implicit bias.</li></ul></div></div>	

OUR PROPOSED ACTIVITY:

IMPACT AREA	SAMPLE ACTIVITIES
<div><div><div><div><div></div><div></div><div></div></div><div>ECONOMIC MOBILITY</div></div></div><div><ul style="list-style-type: none"><li>• Identify the needs of local housing and/or workforce development coalitions that serve low-income and/or communities of color, and provide capacity-building support including training, networking, access to state/local policy leaders, connections to potential partners, and peer-to-peer learning opportunities.</li><li>• Partner with and invest in community development initiatives (e.g. LISC) that focus on neighborhood revitalization, equitable economic growth, and removing barriers to upward mobility for residents.</li></ul></div></div>	

OUR PROPOSED ACTIVITY:

IMPACT AREA	SAMPLE ACTIVITIES
<div><div><div><div><div></div><div></div><div></div></div><div>ACCESS TO HEALTH</div></div></div><div><ul style="list-style-type: none"><li>• Invest in home visiting programs that explicitly focus on meeting the physical and mental healthcare needs of low-income, historically disadvantaged, and/or communities of color.</li><li>• Invest in and advocate for an increase in resources, training, and professional development for community-based clinics that serve low-income, historically disadvantaged, and/or communities of color.</li><li>• Support local coalitions, alliances, and programs led by leaders of color that focus on addressing specific health disparities (e.g. maternal health needs/ mortality rates of African American mothers).</li></ul></div></div>	

OUR PROPOSED ACTIVITY:







# TAKE ACTION

## WHAT ARE OUR THREE PRIORITY STRATEGIES FROM THIS LEVER?

- 1.
- 2.
- 3.

## WHAT RESOURCES DO WE NEED TO SUCCESSFULLY EXECUTE THESE STRATEGIES?

## WHO DO WE NEED TO ENGAGE TO SUCCESSFULLY EXECUTE THESE STRATEGIES?

## WHO ON OUR TEAM IS RESPONSIBLE FOR IDENTIFYING NEXT STEPS IN EXECUTING THESE STRATEGIES?

## ADDITIONAL NOTES



TRACK PROGRESS – SAMPLE SUCCESS MEASURES

SUGGESTED METRICS	WE ALREADY MEASURE THIS	WE WILL MEASURE THIS NOW/IN THE FUTURE	WE DON'T HAVE PLANS TO MEASURE THIS
Total \$ amount of United Way resources devoted to capacity building/operational funding for programs and agencies (overall)			
\$ amount and percentage of capacity building resources invested to strengthen the operational capacity of local organizations that serve communities of color (targeted)			
\$ amount and percentage of capacity-building resources invested to strengthen the operational capacity of local organizations are led by people of color (targeted)			
# and % change (over time) of funding to non-traditional, grassroots programs, and agencies that serve historically disadvantaged and/or underrepresented community residents			
# of leaders from underrepresented and/or historically disadvantaged groups who participate in United Way training and leadership development			
# of unfunded and funded organizations who are building internal capacity and awareness related to equity			
\$ amount increase or decrease (annually) of community-level investments in organizations led by underrepresented groups and people of color			
# of local and regional funders who adopt an equity lens			
# and % of United Way funded agencies and programs who have diverse staffs that are representative of all the communities and populations they serve			
# and % organizations (funded/not funded) by United Way that are led by people of color			
# of trainings (and people) provided to local funded/unfunded programs and agencies focused on diversity/equity/inclusion			
# and % of staff from United Way funded programs and agencies that participate in equity-focused trainings funded/provided by your United Way			
# and % of programs receiving capacity-building support from United Way that can increase non-United Way funding			
# and amount of staff from funded programs and agencies that have access to training on disaggregating data			



HIGHLIGHTED RESOURCES

Centering Race in Health Equity Advocacy: Lessons Learned  
The Colorado Trust and Social Policy Research Associates

This learning paper details the efforts of a cohort of 18 organizations to build individual, organizational, and collective capacity to recognize and combat the role that structural racism plays in health inequities.



# APPENDIX A ORGANIZATIONAL ASSESSMENT

## SETTING A BASELINE: INITIAL ORGANIZATIONAL ASSESSMENT

A core element of the Modern United Way is adopting a growth mindset. This organizational assessment intends to help your United Way understand areas of strength and areas of challenge related to how you are explicitly integrating an equity lens in your work with the community. An honest assessment of where you are will help you identify areas for needed growth and potential action steps to help you move towards this.

### SUGGESTED GUIDANCE FOR COMPLETING THIS ASSESSMENT

1. Provide an opportunity for leadership and staff to complete the assessment on their own using the rating scale below.

2. After providing ample time for leadership and staff to complete the assessment individually, gather staff and leadership that represent every functional area to share and reflect on their responses.

3. Anticipate that there will likely be differences of opinion on elements of the assessment. Assign a skilled facilitator (internal or external, depending on what will work best for your culture), to help surface and navigate these differences. Allow sufficient time for differences to be heard and encourage leadership and staff to be as specific as possible.

4. Take the overall tally and identify areas of strength and challenge.

5. Drive the conversation towards areas of needed growth and brainstorming specific action steps that the organization might prioritize.

6. Consider taking a balanced approach between action steps that are “quick wins” to build confidence and buy-in for this work, and longer-term activities that might yield lasting results.

7. The equity levers in this framework are modular. Your United Way leadership and staff should feel free to prioritize your reading of this document by your lowest-scored equity lever.

8. Repeat this assessment over time and see how your scores change.

#### Rating Scale

5 = Always

4 = Often

3 = Sometimes

2 = Rarely

1 = Never

Unsure





GENERAL EQUITY QUESTIONS

EQUITY	5	4	3	2	1	?
	ALWAYS	OFTEN	SOMETIMES	RARELY	NEVER	UNSURE
Impact Agenda: Our United Way has incorporated the needs of diverse communities we serve as part of goal setting, priority, impact strategies, and impact products.						
Impact Agenda: Our United Way has established specific goals that drive more equitable outcomes for our community (e.g. close the proficiency gap in 3rd grade reading between students by 10 percentage points by 2025).						
Stated Commitment to Equity: Our United Way has a stated commitment to equity including but not limited to an equity statement, equity vision, or some other stated, outwardly communicated equity commitment.						
Buy-in and Organizational Support: Our United Way Board is bought-in to equity as an organizational priority.						
Buy-in and Organizational Support: Our United Way leadership (executive team) is bought-in to equity as an organizational priority.						
Buy-in and Organizational Support: Our United Way staff is bought-in to equity as an organizational priority.						
Resource Allocation: Our United Way allocates resources in alignment with the principles of equity, diversity, and inclusion.						
Resource Allocation: Our United Way has invested in the training and capacity-building of our staff and leadership so that they can integrate equitable practices in their work.						
TOTAL:	___ / 40					

DATA QUESTIONS

DATA	5	4	3	2	1	?
	ALWAYS	OFTEN	SOMETIMES	RARELY	NEVER	UNSURE
Our United Way consistently collects both quantitative and qualitative data.						
Our United Way uses the qualitative and quantitative data we collect to understand the root cause of issues.						
Our United Way disaggregates data based on race/ethnicity gender, sexual orientation, income level, and ability status.						
Our United Way has mapped community-based assets to understand existing efforts, resources, and leadership capacity focused on addressing inequities.						
Our United Way prioritizes making progress on indicators that close gaps across race/ethnicity, gender, sexual orientation, income level, and ability status.						
Our United Way utilizes data to tell stories that highlight root causes and frame community issues as systemic.						
Our United Way tracks progress over time concerning closing gaps and disparities in key education, economic mobility, and health indicators.						
Our United Way uses data on disparities to inform our resource investment decisions.						
Our United Way values lived experiences as valid sources of data and information.						
Our United Way has established data-sharing agreements with community partners, local institutions, and funded agencies/ programs to facilitate a shared understanding of existing gaps and disparities.						
TOTAL:	___ / 50					



COMMUNITY MOBILIZATION AND ENGAGEMENT QUESTIONS

COMMUNITY MOBILIZATION AND ENGAGEMENT	5 ALWAYS	4 OFTEN	3 SOMETIMES	2 RARELY	1 NEVER	? UNSURE
Our United Way has staff at all levels of leadership that reflect the demographic diversity of the communities we serve.						
Our United Way has engaged external organizations and residents to assess the degree of trust and credibility we have to create meaningful community engagement.						
Our United Way uses stories and data in our community engagement efforts to create shared community understanding about historical and current inequities.						
Our United Way uses stories and data in our community engagement efforts to compel people to action.						
Our United Way focuses our engagement activities on identifying opportunities for community action and long-term change.						
Our United Way has developed shared expectations for community engagement and assesses each engagement effort during and after it is complete.						
Our United Way compensates participants in our community engagement efforts.						
Continue on the following page						

1. What are the areas of challenge for our United Way?

2. What are the areas of strength?

3. What are the implications of our score?

4. What specific actions might we take to improve in this equity lever?

Continued

COMMUNITY MOBILIZATION AND ENGAGEMENT	5 ALWAYS	4 OFTEN	3 SOMETIMES	2 RARELY	1 NEVER	? UNSURE
Our United Way regularly uses equitable convening practices in our engagement activities, such as providing food, childcare, transportation, ensuring accessibility of physical space and materials, considering the best time of day to convene, and providing multiple opportunities for participation that vary in time commitment/intensity.						
Our United Way has mapped relationships, institutions, and organizations in our community to understand local power dynamics, the landscape, and the cultural context in which we are operating.						
Our United Way partners with grassroots community leaders, affinity groups, and other community-based organizations with local credibility and strong ties to the community in our efforts to connect with and engage residents.						
Our United Way supports the establishment of and resources community-led decision-making bodies.						
Our United Way invests in building the leadership capacity of community residents.						
Our United Way prioritizes investment strategies and initiatives that have been informed and/or developed in collaboration with community residents.						
TOTAL:	___ / 65					



COMMUNICATIONS AND AWARENESS-BUILDING QUESTIONS

COMMUNICATIONS AND AWARENESS-BUILDING	5 ALWAYS	4 OFTEN	3 SOMETIMES	2 RARELY	1 NEVER	? UNSURE
Our United Way invests in staff skills and knowledge to effectively advocate for equity through our community impact efforts.						
Our United Way normalizes and invests in the capacity of our leadership and staff to have internal conversations about inequity, structural racism and other forms of oppression.						
Our United Way communicates consistently to community residents, partners, and the general public about our organization's commitment to equity.						
Our United Way has created and publicly shared an equity commitment statement that acknowledges historical bias and creating a more equitable community as a north star.						
Our United Way creates and/or shares reports with the community that highlight present and historical disparities and links them to systemic practices, policies, community conditions.						
Our United Way leverages our corporate relationships to build their awareness about community needs and conditions.						
Our United Way carefully reviews and vets our marketing materials to ensure that we are not inadvertently perpetuating stereotypes or negative images of community residents.						
Our United Way creates materials that are accessible, relevant and meaningful to the community we are engaging.						
TOTAL:	___ / 40					

POLICY AND ADVOCACY QUESTIONS

POLICY AND ADVOCACY	5 ALWAYS	4 OFTEN	3 SOMETIMES	2 RARELY	1 NEVER	? UNSURE
Our United Way analyzes indicators with significant disparities to understand underlying, "root" causes.						
Our United Way analyzes indicators with significant disparities to determine policy and advocacy priorities.						
Our United Way advocates for specific state and local policies in childhood/youth success, economic mobility, and health that have the greatest potential for closing gaps.						
Our United Way engages community residents to identify which policies are important to them.						
Our United Way leverages our brand and network to emphasize the importance of equity in policy to policymakers.						
Our United Way shares data on state and local policies that have disparate impacts based on race/ethnicity, gender, sexual orientation, income level, and ability status with our networks (i.e. other United Ways in our state, community partners, coalitions, advocacy groups).						
Our United Way honestly assesses where equitable policies may conflict with the interests of our donors and funders and fosters discussion about that tension.						
TOTAL:	___ / 35					

1. What are the areas of challenge for our United Way?

2. What are the areas of strength?

3. What are the implications of our score?

4. What specific actions might we take to improve in this equity lever?



FUNDRAISING, RESOURCE ALLOCATION AND GRANTMAKING

FUNDRAISING, RESOURCE ALLOCATION + GRANTMAKING	5 ALWAYS	4 OFTEN	3 SOMETIMES	2 RARELY	1 NEVER	? UNSURE
Our United Way prioritizes advancing equity in the weighing of our grantmaking, resource allocation, and partnership decisions.						
Our United Way collects demographic data on donors.						
Our United Way develops outreach strategies for engaging new donors and leverages existing United Way affinity groups to do so.						
Our United Way engages key community constituencies to inform the grantmaking process.						
Our United Way prioritizes equity by removing funding barriers for organizations that are led by individuals who have been historically underrepresented in leadership positions, including people of color (POC), women, and individuals with disabilities.						
Our United Way prioritizes equity by removing funding barriers for organizations that are explicitly focusing on advancing equity by closing disparities that are based on racism, sexism, ability status, and income level.						
Our United Way promotes diversity, equity, and inclusion in our procurement policies for vendors we directly hire.						
TOTAL:	___ / 35					

LOCAL CAPACITY BUILDING QUESTIONS

LOCAL CAPACITY BUILDING	5 ALWAYS	4 OFTEN	3 SOMETIMES	2 RARELY	1 NEVER	? UNSURE
Our United Way regularly reviews our internal resource investment and grantmaking processes to identify barriers and funding inequities between well-established, large nonprofits, and smaller organizations, especially those led by people of color and/or women.						
Our United Way makes strategic investments to build the capacity of local nonprofit leaders, especially women and/or people of color, focusing on networking, professional development, mentorship, and opportunities for continued growth.						
Our United Way uplifts and amplifies partners and businesses demonstrating their commitment to equity.						
Our United Way engages high-level leadership to communicate and reinforce our organizational commitment to equity.						
Our United Way builds the capacity of grantees and partner organizations to make equity a strategic and operational priority.						
TOTAL:	___ / 25					

1. What are the areas of challenge for our United Way?
2. What are the areas of strength?
3. What are the implications of our score?
4. What specific actions might we take to improve in this equity lever?



# APPENDIX B DISCUSSION GUIDE

Developing and deepening an explicit equity lens in the work of United Ways requires intentionality. United Ways that create opportunities for leadership and staff to collectively plan, engage, assess, and improve their efforts can help build the organization's capacity over time. Ultimately, this creates more effective and equitable strategies and interventions.

Below are discussion guides for each equity lever to help your United Way plan and reflect on your equity practices. These questions are meant to be a starting point and we encourage you to follow the conversation wherever it takes you. In contrast to the assessments for each lever, which asks you to reflect on the extent to which you have integrated a particular strategy or practice, these questions provide an opportunity to delve deeper to plan your approach and to explore in what ways you might strengthen your efforts.

You may not come to complete a resolution in a given conversation, but over time these critical questions should become a normal part of your organizational practice.



## DATA

Data is a powerful tool to help us measure how successfully we are applying an equity frame throughout our work. The following are key questions to ask throughout a data gathering and analysis process to ensure equity is a priority. You can further strengthen your approach by including the perspectives of community members early on and throughout the process. This conversation can be led by research and evaluation or impact staff but should engage a cross-functional group for maximum alignment and buy-in.

### KEY QUESTIONS TO ASK WHEN PREPARING TO COLLECT COMMUNITY DATA

1. What problem are we trying to solve?
2. Who is most impacted by this problem?
3. What information already exists about this problem?
4. What are the barriers to gathering needed data? For example, geography, language, or historic relationships.
5. What data gathering strategies and tactics have worked in the past in this community?
6. What specific strategies, tools, and technologies can we use to enable full community participation, especially residents most impacted by the problem?
7. In what ways can we leverage our strategic partners to ensure robust and inclusive input?

### KEY QUESTIONS TO ASK WHEN ANALYZING COMMUNITY DATA

1. Is our analysis conducted by individuals trained in equitable and inclusive data processes to help mitigate bias in the analysis and conclusions?
2. To what extent do the individuals analyzing the data understand the context of the communities we are researching?
3. How are we testing our initial assumptions against the data we've collected (for example, the questions in the data gathering section)?

### KEY QUESTIONS FOR YOUR TEAM TO CONSIDER WHEN COMMUNICATING THE RESULTS OF THE DATA THAT'S BEEN COLLECTED AND ANALYZED

1. What types of inclusive data communication strategies are we using in our data sharing efforts (e.g. accessible language, visual representations of the data, sharing the data at various levels of detail)?
2. In what ways are we communicating our findings to the communities most impacted by the problem, other constituencies, and our donors?
3. In what ways are we using our data to inform strategy, decision making, resource allocation, programmatic outcomes, and engagement practices?



## COMMUNITY MOBILIZATION AND ENGAGEMENT

Establishing equity principles to guide your ongoing community mobilization and engagement efforts is the best way to ensure you have as inclusive a process as possible. By asking critical questions at the outset, along the way, and after a phase of community engagement activities, you are better able to fill equity gaps and leverage opportunities. This conversation can be led by impact or community engagement staff but should engage a cross-functional group for maximum alignment and buy-in.

### KEY QUESTIONS TO ASK PRIOR TO ENGAGEMENT ACTIVITIES

1. What is our plan to ensure diverse perspectives are represented in our process?
2. What is our plan to ensure the groups most impacted by the issue are engaged?
3. What groups are essential to the success of our engagement process?
4. What will we communicate about the intentions and expected outcomes of the process? How will we convey how participants can influence the outcomes of the process?
5. How will we manage power dynamics in this process?
6. How do we plan to collect information about participants in our process?

### QUESTIONS TO ASK DURING ENGAGEMENT ACTIVITIES

1. How are we collecting information about participants in our process?
2. How effectively are we engaging our various target groups in this process thus far? Is anyone missing from the table? How might we engage them?
3. How are we accounting for power dynamics during our engagement process? Is there an opportunity to do better?
4. Have we shared back information about how our process is progressing to the key constituencies whom we have engaged?
5. How are we ensuring that there is enough time for participants to meaningfully engage in this process? Do we need to adjust our process timeline for more meaningful engagement?
6. How are we integrating the feedback we are getting about our process to make course corrections (as needed)?

### QUESTIONS TO ASK TO EVALUATE THE SUCCESS OF ENGAGEMENT ACTIVITIES

1. How effectively did we engage key constituencies in the process? What groups did we most effectively engage? Why? What groups did we least effectively engage? Why?
2. How did we engage strategic partners in the process? Was it effective?
3. In what ways did we create ongoing communication mechanisms to "close the loop" with the community? Were they effective?
4. How did we manage power dynamics in the process? Was it effective?
5. How did we adapt our engagement process to ensure community residents and strategic partners could easily



participate? Examples food, childcare, close to public transportation, ADA spaces, various times of day, language translation, making material available in multiple languages, having material provided for various learning styles throughout the process.

6. How did we ensure sufficient time for participants to engage in the process? Was it effective? What areas went unexamined?

7. How will we use the input gathered and/or proposed solutions in our work?



## COMMUNICATIONS AND AWARENESS-BUILDING

Communications and awareness building that effectively integrates an equity lens approaches this as both a process and an outcome - your United Way should work to ensure that the content and channels of your communications are equitable and inclusive and that your efforts lead to a shared understanding of equity.

Your United Way can utilize surveys, focus groups, one-on-one interviews, and other approaches to understand how and what messages related to equity are both understood and resonant with community residents, donors, partners, funded agencies, and other key constituencies. This is important to develop a shared understanding of the root causes of inequities and to help identify which impact strategies will ultimately win the support of key constituencies.

There are several key questions related to communications and awareness-building that your team should explore. Be sure to engage a variety of perspectives in this discussion. Your marketing and communications staff can lead this conversation, but they should engage a cross-functional group for maximum alignment and buy-in.

### QUESTIONS TO ASK ABOUT THE CONTENT BEING SHARED

1. Is our United Way familiar with the messaging landscape on the issue(s)?
2. How have we engaged coalition members of partners to develop our core messages? Do all members feel a sense of collective ownership over the messaging?
3. How are we utilizing asset-based language in our communications that avoids stereotyping or tokenizing individuals representing specific populations?
4. How are we ensuring that we're utilizing the most up to date language to refer to historically disadvantaged groups and/or those experiencing marginalization?
5. How are we using data in our communications to generate narratives that inspire the community to action?
6. How are we building, over time, a shared understanding of the historic and present consequences of inequity?

### QUESTION TO ASK ABOUT THE COMMUNICATION CHANNELS BEING UTILIZED

1. How are we leveraging existing communication channels to share messages with community members, donors, partners, funded agencies, and other key constituencies?
2. How are we leveraging community leaders and partners, especially those with strong relationships and established trust with specific populations, to develop and convey our core messages?
3. What non-traditional channels might we employ to engage hard to reach audiences?
4. How effective are our engagement channels, and is there a need to reassess our strategy?



## POLICY AND ADVOCACY

United Way's policy work is one of the tools we have to work towards change at scale. Measuring how successful your policy and advocacy efforts are, particularly in terms of driving more equitable outcomes, can be challenging. In addition to the quantitative metrics presented in earlier sections of this framework, you can use the discussion questions below to reflect on the impact of your policy and advocacy efforts. Policy and advocacy staff can lead this conversation, but they should engage a cross-functional group for maximum alignment and buy-in.

### QUESTIONS TO ASK RELATED TO YOUR EXISTING POLICY AND ADVOCACY EFFORTS

1. How are our policy and advocacy efforts building a stronger base of support for policies that close equity gaps?
2. How have we increased civic participation within communities of color and other historically marginalized groups?
3. How are we building and/or participating in policy and advocacy coalitions that focus on increasing equitable community outcomes?
4. What strategies are we utilizing to build bridges and create consensus amongst those with dissimilar interests? Are they effective?
5. Have we noticed a change in local attitudes, knowledge, or values? How do we know?
6. To what extent are local organizations (funded and unfunded) improving their capacity to advocate for policy change? What evidence can we point to?
7. What specific policies are being developed in our community that will help close disparities and create more equitable outcomes? How are we helping to advance these policies? What is missing?



## FUNDRAISING, RESOURCE ALLOCATION + GRANTMAKING

United Way's fundraising and grantmaking capabilities are a core way to potentially reduce disparities and close gaps if there is an intentional examination of resource development efforts with an equity lens. A cross-functional team (Impact, Resource Development, Finance, senior leadership) should make it a practice to reflect on the extent to which your efforts are increasing equity or exacerbating existing inequities at the end of each budgeting or grant cycle and throughout the fundraising process.

### QUESTIONS TO ASK RELATED TO YOUR FUNDRAISING EFFORTS

1. How well do our existing donors understand the importance of increasing/maintaining our United Way's focus on equity?
2. How diverse are our donors? Which specific populations are underrepresented in our existing donor base? What strategies might we employ to engage them in our work?
3. How supportive are existing donors of our focus on equity? What strategies have we employed to engage them on this issue? What has/has not worked?
4. How have we engaged and leveraged our board members to advocate for equity with key constituencies, and to set the tone within the organization? What has/has not worked?
5. How have we engaged prospective donors (corporate, major donors, individuals) on this issue? What has/has not worked?



QUESTIONS TO ASK RELATED TO RESOURCE ALLOCATION

- 1. What proportion of organizational resources is being allocated to internal capacity-building of leadership and staff to increase their understanding regarding the importance of focusing on equity?
- 2. To what extent do the vendors we contract with represent the communities we serve? Where are there opportunities to increase diversity in our vendor pool?
- 3. How are we measuring returns on our resource allocations?
- 4. What programs are receiving more resources than others? Are these programs explicitly addressing equity?
- 5. Are the programs that are receiving more resources staffed by leadership that is diverse and representative?

QUESTIONS TO ASK RELATED TO GRANTMAKING

- 1. How equitable is our current application process?
- 2. What specific strategies are we implementing to remove barriers of access to funding, especially for small organizations, those led by people of color, and those serving historically disadvantaged populations?
- 3. In what ways has the community been invited to play a role in our grantmaking decisions? How can we increase community participation?
- 4. How specifically is our United Way investing in the internal capacity of grantees to advance equity, including training and capacity-building?



LOCAL CAPACITY-BUILDING

Applying an equity frame allows your United Way to identify capacity-building priorities in the community and within your organization. Understanding what key capacities can potentially increase equity as well as what will work in your community context should inform and help strengthen your United Way’s grantmaking and resource allocation (internal and external) strategies.

QUESTIONS TO ASK RELATED TO LOCAL CAPACITY BUILDING

- 1. In what ways is our United Way supporting funded partners and agencies to build their internal capacity to collect, analyze, and share data?
- 2. How is our United Way investing in the learning and development of funded partners and agencies to help create more equitable and inclusive organizational cultures? What is/is not working?
- 3. How are we holding funded agencies and partners accountable for increasing the diversity of their staff and leadership?
- 4. In what ways is our United Way engaging and investing in the leadership capacity of individuals, especially women and/or people of color? How are we connecting them to networks and other opportunities they might not have access to? Where are the gaps?
- 5. Is our United Way actively engaging our Board of Directors to deepen their understanding of equity and building their capacity to make decisions that drive greater equity, diversity, and inclusion?
- 6. What strategies are we employing to increase community member representation on our Board of Directors, especially community members from historically disadvantaged populations?
- 7. In what ways is our United Way investing in the development of our managers and senior leaders so that they possess skills that drive greater staff retention, more diverse hiring, and inclusive decision-making?





# APPENDIX C

## SELECTED TOOLS AND RESOURCES

### DATA

<b>D5: Making the Case For Demographic Data Collection</b> D5 Coalition	This document makes suggestions for designing, implementing, and assessing the impact of programs and investments through gathering and analyzing demographic data ensuring responsive and relevant approaches to impact.
<b>By The Numbers: A Race for Results Case Study Using Disaggregated Data to Inform Policies, Practices and Decision-making</b> Annie E. Casey Foundation	This publication is the second installment in the Race for Results case study series. It features an inside look at how the W. Haywood Burns Institute and the Kirwan Institute for the Study of Race and Social Policy use disaggregated data on race and ethnicity to improve the lives of children and communities. These examples illustrate why the collection, analysis, and use of race and ethnicity data should be an integral part of any strategy, initiative, or legislative agenda affecting children, families, and communities.
<b>Next Steps on DEI: Collecting Better Data for Greater Impact</b> McKnight Foundation	The McKnight Foundation describes how collecting and analyzing disaggregated data can inject fresh thinking and asserts that there's a significant body of evidence showing that this effort helps institutions adjust strategies and uncover hidden patterns of impact.
<b>Report: What Does It Take to Embed A Racial Equity &amp; Inclusion Lens</b> Living Cities	This report seeks to support organizations in better operationalizing racial equity and inclusion in their work.
<b>Operationalizing Racial Equity &amp; Inclusion: Contextualizing Systems, Data, and Place</b> Living Cities	This series highlights the twelve themes uncovered in Living Cities' scan of practices being used by organizations to operationalize racial equity.

### COMMUNITY MOBILIZATION AND ENGAGEMENT

<b>Community Engagement Webinar - United Way Worldwide</b>	This webinar, convened by United Way Worldwide, profiles the equity efforts of two national nonprofits: The National League of Cities' Race, Equity and Leadership (REAL) initiative, designed to strengthen the knowledge and capacity of local leaders to eliminate racial disparities, heal racial divisions, and build more equitable communities; and Policy Link's Equity Atlas, a data tool for organizations, including United Ways, to use to understand the prevalence of inequities in the communities they serve.
<b>Nonprofit Service Organizations Civic Engagement: Addressing Challenges and Moving Forward</b> Building Movement Project	Building Movement Project describes a continuum of strategies for civic engagement that can be adopted by service providers and other nonprofit groups, especially in terms of how groups can significantly involve their clients/ constituents in their communities.
<b>Pursuing Racial Equity Through Civic Engagement and Mass Media</b> National Network of Grantmakers, Wilder Research, and the Northwest Area Foundation, The Catalyst Project	This paper discusses social justice and ways to attain it. It provides background for the 2005 National Network of Grantmakers conference "The Power of Generations: Pursuing Social Justice through Sacred Relationships."
<b>The Principles for Equitable and Inclusive Civic Engagement: A Guide to Transformative Change</b> Kip Holley, Kirwan Institute	This guide asserts that for people to exercise their civic power and voice equitably, we must change the way we think about civic engagement, making transformative changes in our longstanding customs, assumptions, and institutions.
<b>Facilitation guide for community engagement How to Foster Effective Conversations about Our Work and Our Communities</b> National Gender and Equity Campaign In Minnesota	This guide is intended as a resource for effective dialogue about work with communities, with the overarching goal of beginning to collectively explore the vision, assets, and commonalities that will help build a movement for positive and lasting social change towards a more just and equitable society.
<b>All the People, All the Places: A Landscape of Opportunity for Rural and Small-Town Civic Engagement</b> Ben Goldfarb, Wallace Global Fund & New Venture Fund	Ben Goldfarb a long-time organizer and grassroots consultant, presents a nuanced landscape analysis and strategy review, providing cogent insights for funders across the issues and challenges that affect those who live in small towns and cities. He outlines a set of options for investments by national and place-based donors and their grantees to reverse our absence.
<b>Strategies Guided by Best Practice for Community Mobilization</b> Advocates for Youth	This document summarizes 14 key strategies that are based on best practices in community mobilization, collaborative partnerships, and coalition-building.



COMMUNICATIONS AND AWARENESS BUILDING

<b>Words Matter: Language and Social Justice in the US South</b> Grantmakers for Southern Progress	This short paper aims to provide grantmakers with a better understanding of how the language they use may be received by different funders based on research conducted by Grantmakers for Southern Progress highlighting the thinking and motivation behind social justice in the U.S. South.
<b>Racial Equity Communications Strategy</b> W.K. Kellogg Foundation	This document outlines the long-term communications strategy toward racial equity as incorporated by the W.K. Kellogg Foundation.
<b>Racial Equity Value Statements</b> Partnership for a Healthy Durham	This document contains racial equity value statements from various organizations located in different places.
<b>The Bias of ‘Professionalism’ Standards</b> Aysa Gray, Stanford Social Innovation Review	The authors of this piece describe how the standards of <b>professionalism</b> , are heavily defined by <b>white supremacy culture</b> —explicitly and implicitly discriminating against non-Western and non-white professionalism standards related to dress code, speech, work style, and timeliness.
<b>Communicating on Racial Equity Tools</b> Racial Equity Tools	This resource offers information about using communication as one strategy to pursue racial equity goals. The resources cover four specific topics that surface often in racial equity work including communicating for racial justice, how to create frames and messages in ways that are heard as intended by the audiences for racial equity work, working with the media and the use of social media.
<b>Paying Attention to White Culture and Privilege: A Missing Link to Advancing Racial Equity</b> Gita Gulati-Partee, OpenSource Leadership Strategies, & Maggie Potapchuk, MP Associates, The Foundation Review	This article discusses tools for identifying how white supremacy shows up in the workplace and helps leadership create spaces to establish intentional group norms, explore accumulated racial advantages and disadvantages, reflect on white culture, and caucus by racial identity.



POLICY AND ADVOCACY

<b>An Integrated Anti-Oppression Framework for Reviewing and Developing Policy</b> Margaret Alexander, Springtide Resources	This toolkit aims to help organizations review and consider changes to policies to make sure that they are equitable for all employees and members, and their community. Funded by the United Way of Toronto.
<b>Awake to Work to Woke</b> Equity in the Center	This publication describes the necessity of building a race equity culture within organizations. Attaining race equity requires examination of the levels to which racism operates (personal, interpersonal, institutional, and structural), recognize the role in enduring inequities, and committing to change.
<b>Leading at the Intersections: An Introduction To The Intersectional Approach Model For Policy &amp; Social Change</b> Women of Color Policy Network	This publication calls on small grassroots organizations, foundations, and legislators to shift the framing and the approach to social and policy change. It is a starting point and a tool to begin the conversation of how to make change without losing individuals, groups, and communities along the way.
<b>Racial Equity Policy Design and Advocacy: A Primer</b> Prosperity Now	This primer aims to identify the elements of advocacy, policy design, and implementation practices that improve outcomes for people of color.
<b>Best Practices for White-led Organizations to Promote Health Equity and Racial Justice in Health Equity</b> Community Catalyst	This toolkit also aims to help white-led organizations align their work with existing health advocacy, organizing, and community-building work already happening in communities of color in ways that are respectful and grounded in an understanding of power and racial justice principles.





FUNDRAISING, RESOURCE ALLOCATION AND GRANTMAKING

<b>Leading by Example: Diversity, Inclusion and Equity in Community Foundations</b> Coalition of Community Foundations for Youth and California Tomorrow	This piece describes how foundations have identified the importance of inclusion and equity in strategy development as the communities that foundations serve are experiencing dramatic changes because of recent demographic shifts, enduring systemic inequities in the economic, political, and social arenas.
<b>Report: Grantmaking with a Racial Equity Lens</b> Annie E Casey Foundation	This guide explores how a racial equity lens can help develop new leaders, encourage innovative approaches, get people talking, and inspire change inside foundations.
<b>Liberate Philanthropy</b> Justice Funders	The Liberate Philanthropy blog series inspires us to reimagine and practice a new kind of philanthropy that redistributes wealth, democratizes power, and shifts economic control to communities.
<b>Resonance: A Framework For Philanthropic Transformation</b> Justice Funders	Resonance: A Framework for Philanthropic Transformation is a guide to support philanthropic organizations in accelerating a Just Transition by reducing extractive practices and increasing regenerative practices.
<b>Breaking Bad Philanthropic Habits</b> Justice Funders	In 2017, Justice Funders released a blog series on “Breaking Bad Philanthropic Habits” as a way to reflect and identify actions to take. This publication centers on setting new practices that will better serve the funders of the movement’s support.
<b>Funding Movement Building: Bay Area Approaches</b> Bay Area Justice Funders Network	Funding Movement Building: Bay Area Approaches details the findings from the Bay Area Justice Funders Network’s 2012 survey of Bay Area Social Justice philanthropies.
<b>How Donor-centrism Perpetuates Inequity, And Why We Must Move Toward Community-centric Fundraising</b> Nonprofit AF	The author of this piece speaks about the pervasiveness of the donor-centered approach model in the nonprofit sector and how it may be perpetuating the very inequity that we are seeking to address as a sector.
<b>Operationalizing Equity</b> Annie E Casey Foundation	This brief report serves as a resource and reference point for other organizations that share the Annie E. Casey Foundation’s desire to embrace equity as a core value reflected in all elements of the institution’s programs and operations.

LOCAL CAPACITY BUILDING

<b>Advancing Racial Equity Through Capacity Building: The Kresge Foundation's Talent and Leadership Development Efforts</b> Grantcraft	The Kresge Foundation describes how it addresses capacity-building programs by focusing specifically on leadership development through a racial equity lens and investing in the talent and leadership capacity of its grantees. This investment better equips nonprofits to advance racial equity and achieve better outcomes in their organizations and communities.
<b>A Framework For Inclusive Governance: The Continuum From Exclusion To Inclusion</b> Foundation Consortium for the Results for Children Initiative	A continuum that describes the varying levels of exclusion to inclusion on a five-point Likert scale.





# APPENDIX D

## GLOSSARY OF TERMS

### CLASS

Relative social status based on income, wealth, race, power, position, occupation, and education.

### DIVERSITY

Each individual is unique, and groups of individuals reflect multiple dimensions of difference including race, ethnicity, gender, class, sexual orientation, age, physical abilities, religious beliefs, political beliefs, and cognitive styles.

### DOMINANT CULTURE

This refers to the established language, religion, values, rituals, and social customs on which society was built. It has the most power and is widespread and influential within a social entity such as an organization, in which multiple cultures are present. The leadership, management standards, and preferences of those at the top of an organization's hierarchy heavily influence the dominant culture. In this framework, dominant culture refers specifically to the American context in which organizational culture is predominantly defined by white men and white women in positional power.

### EQUITY VS. EQUALITY

In the context of societal systems, equality, and equity refer to similar but slightly different concepts. Equality generally refers to equal opportunity and the same levels of support for all segments of society. Equity goes a step further and refers to offering varying levels of support depending upon the need to achieve greater fairness of outcomes.

### EQUITY-MINDEDNESS

#### A WILLINGNESS AND ABILITY TO:

- Call attention to patterns of inequitable outcomes.
- Take personal and institutional responsibility for the success of program participants (e.g., members, students, constituents)
- Critically reassess practices and demonstrate race-consciousness
- Understand the social and historical context of exclusionary practices in their field/area of work



### ETHNICITY

Identifies groups that share a common identity-based ancestry, language, or culture. It is often based on religion, beliefs, customs, memories of migration or colonization, and current shared experiences.

### INCLUSION

Authentically bringing traditionally excluded individuals and/or groups into processes, activities, and decision/policy-making in a way that shares power.

### INSTITUTIONAL OPPRESSION

The idea that one group is better than another group and has the right to control the other gets embedded in the institutions of the society—the laws, the legal system and police practice, the education system and schools, hiring policies, public policies, housing development, media images, political power, etc. When a woman makes two-thirds of what a man makes in the same job, it is institutionalized sexism. When one out of every four African American young men is currently in jail, on parole, or probation, it is institutionalized racism. When psychiatric institutions and associations “diagnose” transgender people as having a mental disorder, it is institutionalized gender oppression and transphobia. Institutional oppression does not have to be intentional. For example, if a policy unintentionally reinforces and creates new inequalities between privileged and non-privileged groups, it is considered institutional oppression. Race-based disadvantages, discrimination, and exploitation are based on skin color.

### INTERPERSONAL OPPRESSION

The idea that one group is better than another and has the right to control the other, which gets structured into institutions, gives permission and reinforcement for individual members of the dominant group to personally disrespect or mistreat individuals in the oppressed group. Interpersonal racism is what white people do to people of color up close—the racist jokes, the stereotypes, the beatings and harassment, the threats, etc. Similarly,



interpersonal sexism is what men do to women, the sexual abuse and harassment, the violence directed at women, the belittling or ignoring of women's thinking, the sexist jokes, etc. Most people in the dominant group are not consciously oppressive. They have internalized the negative messages about other groups and consider their attitudes towards the other group quite normal.

### INTERSECTIONALITY

An analysis of the connections between systems of oppression (e.g., racism and classism, racism and sexism) and how individuals experience those intersecting or compounding systems of oppression or privilege.

### MICROAGGRESSIONS

Brief and commonplace verbal, behavioral, or environmental indignities, whether intentional or unintentional, that communicate hostile, derogatory, or negative racial slights and insults toward African Americans, Indigenous, and other people of color.

### RACE

A socially constructed way of grouping people based on skin color and other apparent physical differences, which has no genetic or scientific basis. The ideology of race has become embedded in our identities, institutions, and culture and is used as a basis for discrimination and domination.

### RACIAL JUSTICE

The systemic, fair treatment of people of all races resulting in equitable opportunities and outcomes for everyone. All people can achieve their full potential in life, regardless of race, ethnicity, or the community in which they live. A racial justice framework can move us from a reactive posture to a more powerful, proactive, and even preventative approach.

### RACIAL PRIVILEGE

Race-based advantages and preferential treatment based on skin color (often experienced without any conscious effort or awareness).





## TYPES OF RACISM

### • INTERNALIZED RACISM

A set of privately held beliefs, prejudices, and ideas about the superiority of whites and the inferiority of people of color. Among people of color, it manifests as internalized oppression. Among whites, it manifests as internalized racial superiority.

### • INTERPERSONAL RACISM

The expression of racism between individuals. It occurs when individuals interact, and their private beliefs affect their interactions.

### • INSTITUTIONAL RACISM

Discriminatory treatment, unfair policies and practices, inequitable opportunities, and impacts within organizations and institutions, all based on race, that routinely produce racially inequitable outcomes for people of color and advantages for white people. Individuals within institutions take on the power of the institution when they reinforce racial inequities.

### • STRUCTURAL RACISM

A system in which public policies, institutional practices, cultural representations, and other norms work in various, often reinforcing ways to perpetuate racial group inequality. It is the presence of racial bias among institutions and across society. It involves the cumulative and compounding effects of societal factors including the history, culture, ideology, and interactions of institutions and policies that systematically privilege white people and disadvantage people of color.

### • ANTI-AFRICAN AMERICAN RACISM

Describes how racism specifically targets and places African American people at the bottom of the racial hierarchy. While racism affects people of color from all backgrounds, it has a particular impact on African American people. It's important to understand these nuances to avoid reinforcing the racial hierarchy in efforts to combat racism and build solidarity among different people of color groups.







### POWER

The ability to define or change situations. Power can manifest as personal or collective self-determination. Power is the ability to influence others to believe or adopt similar values that those in power desire.

### STEREOTYPE

A standardized mental picture that is held in common about members of a group that represents an oversimplified opinion, attitude, or unexamined judgment, without regard to individual differences.

### UNCONSCIOUS BIAS/IMPLICIT ASSOCIATION

The attitudes or stereotypes that affect our understanding, actions, and decisions unconsciously. They are activated involuntarily, without conscious awareness or intentional control. They can be either positive or negative, and everyone is susceptible.

### WHITE SUPREMACY

The existence of racial power that denotes a system of structural or societal racism that privileges white people over others, regardless of the presence or absence of racial hatred. White racial advantages occur at both the collective and individual levels. Both people of color and white people can perpetuate white-dominant culture, resulting in the overall disenfranchisement of African Americans, Indigenous, and other people of color in many aspects of society.

### WHITE SUPREMACY CULTURE

The existence of racial power that denotes a system of structural or societal racism that privileges white people over others, regardless of the presence or absence of racial hatred. White racial advantages occur at both the collective and individual levels. Both people of color and white people can perpetuate white-dominant culture, resulting in the overall disenfranchisement of African Americans, Indigenous, and other people of color in many aspects of society.





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**A Modern United Way must also work to engage community residents, particularly those who have been historically marginalized.**

**By challenging practices based on racism, sexism, and other historical and current forms of discrimination, we can create more inclusive communities and equitable outcomes.**







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