



# EQUITABLE IMPACT AGENDAS PLAYBOOK

United Way Worldwide  
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Please note, this playbook is not intended to be followed in sequence or linear approach. Apply it to your current standing and deepen the work where you have resources and momentum. Use discretion and solicit feedback from stakeholders to determine actions that are feasible for your organization and challenge the status quo to advance the organization's equity work.

\*Some reference materials linked throughout the playbook may require United Way Online login.



# DEVELOPING AN EQUITABLE IMPACT AGENDA – KEY STEPS



## TAKE STOCK

DISCOVER PRIORITY  
ISSUES

PG. 22

**Step 1** - Identify internal starting points to assess current awareness of strategies, illuminate opportunity areas, and determine progress made towards equity provisions.

**Step 2** - Collect and analyze disaggregated data to surface persistent racial (and other) gaps and disparities, understand who is impacted by issues, and to engage current and potential donors.

**Step 3** - Engage the community to gain stakeholder perspectives and tap into insights from lived experiences.



## TAKE ACTION

DIAGNOSE CAUSES, SET  
GOALS, AND DEVELOP  
STRATEGIES

PG. 40

**Step 4** - Analyze disaggregated data to understand root causes of issues and uncover systemic challenges.

**Step 5** - Identify priority issues.

**Step 6** - Set universal and targeted community impact goals, with targeted goals addressing equity and calling attention to disparities.

**Step 7** - Identify strategies and approaches to address the priority issues.



## TRACK PROGRESS

DEMONSTRATE IMPACT

PG. 60

**Step 8** - Determine outcome measures you will use to track progress.

**Step 9** - Share your progress, using strategic storytelling to communicate information about systemic change effectively.

Click on each step listed above to go to that section of the playbook.





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# INTRODUCTION

This playbook provides guidance to help United Ways integrate equity as a process and outcome into your community impact agenda, whether you are just getting started or revisiting an existing one. United Ways utilize diverse approaches to integrate equity into their strategies—where relevant, we showcase examples from local United Ways and other organizations. No one-size-fits-all approach exists. Each United Way should start where there are resources and momentum to strengthen and/or improve existing practices, policies, and procedures.

Before exploring methods for integrating equity into your community impact agenda, familiarize yourself with key resources that will help strengthen and deepen your understanding of our approach to community impact and equity.

## **COMMUNITY IMPACT MODEL OVERVIEW\***

A summary of our 2028 U.S. Impact Goals, original Strategy Guides, and information about how to establish a community impact agenda.

## **THE EQUITY FRAMEWORK**

A tool to help build the capacity of United Ways to integrate an explicit equity lens throughout their work and core business practices.

## **THE EQUITY TOOLKIT**

A tool to assist in building an internal understanding of the core issues related to equity and deepen your organization's capacity to focus on race, equity, and inclusion.

## **EQUITY STRATEGY GUIDES IN CHILDHOOD AND YOUTH SUCCESS, ECONOMIC MOBILITY, & HEALTH**

A resource that provides specific strategies, approaches, and local examples to help United Ways advance equitable change in education (Childhood and Youth Success), Economic Mobility, and Health.

## **EQUITY CORE CONTENT MODULES\***

Online, modular, and asynchronous training that consists of six modules totaling three hours of content. The modules cover topics relevant for United Ways seeking to increase their ability to deliver equitable community impact.

## **GLOBAL RESULTS FRAMEWORK\***

A common set of indicators in Childhood and Youth Success, Economic Mobility, and Health that United Way Worldwide collects annually to demonstrate our network's global reach and impact. This can assist you to identify appropriate indicators to collect to demonstrate progress.

# COMMONLY USED TERMS

Below are terms used throughout this document. Leverage our [United Way equity glossary](#) to facilitate shared language related to diversity, equity, and inclusion. Where helpful, some definitions hyperlink to external resources to provide additional context.

## AGENCIES

An entity funded by local United Ways that often administers one or more programs. Funding may be based on longstanding relationships between the United Way and the agency, referred to as a “traditional funding model,” or driven by the degree of alignment between the agency’s work and stated United Way goals.

## BACKMAP

A process to uncover root causes of issues by working backwards from a data point (e.g., third grade reading proficiency) to understand the underlying issues that potentially contribute to the current outcome.



## BIPOC

Refers to Black, Indigenous, and People of Color. Though BIPOC people are often a focus of engagement, impact work can also extend to other overlooked communities and identities.

## COLLECTIVE IMPACT

The process by which community stakeholders create cross-sector collaborations to deliver broadscale change. Key elements include a common agenda, a centralized infrastructure with dedicated staff, shared measurement to track progress, ongoing communication, and aligned/reinforcing activities across all partners. Collective impact efforts provide an opportunity to leverage community partnerships, existing efforts, and engage stakeholders to advance shared goals.

## COMMUNITY

A term for a given geographic area and/or individuals associated with this particular area. This can also refer to individuals with shared or common interests who may or may not be associated with a particular place.

## COMMUNITY IMPACT

The process by which local United Ways create positive community change to improve the lives of residents and address underlying issues.

## COMMUNITY IMPACT STRATEGY

A carefully selected, evidence-based set of approaches to achieve specific results for a defined population by creating lasting changes in community conditions to address the underlying causes of an issue.



## EQUITY

The intentional inclusion of everyone in society; 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.

## GLOBAL IMPACT AGENDA

Articulates high-level United Way Network goals in Childhood and Youth Success, Economic Mobility, and Access to Health to create opportunity and strengthen communities. Goals are meant to be adapted and customized by local United Ways.



# COMMONLY USED TERMS (CONTINUED)

## IMPACT STORY

A story that conveys progress made in a particular issue area that highlights changes in the community, the resulting impacts on individual lives, and the role of United Way (and community partners) in achieving this change.

## ROOT CAUSE ANALYSIS

The process of identifying a problem and working to uncover its potential causes and issues related to its root causes. A “backmap” (see definition above) is one tool for undertaking root cause analysis.

## STRATEGY MAP

A visual representation of an organization’s work in a specific impact area (e.g., Youth and Childhood Success) that helps organize the goal, strategies, approaches, target population, and intended outcomes to address a particular issue.

## PROGRAM

Specific services and/or supporting services (e.g., mentoring, tax preparation) provided by agencies and organizations funded by local United Ways. Agencies can run multiple programs simultaneously.

## STRATEGY

Types of interventions that could be employed to reach a goal and impact the cause.

## U.S. 2028 GOALS\*

High-level, customizable goals created with the former National Professional Council (NPC) leadership body in the United Way Network and UWW staff leadership that articulate U.S. United Ways’ collective focus to engage people to access quality jobs, increase college and career readiness, and promote health.





## TARGETED UNIVERSALISM

A concept introduced by John Powell of the Othering and Belonging Institute. Targeted universalism aims to use targeted approaches to achieve universal goals in recognition that people are situated differently at varying starting points and don't have equal access to opportunities, networks, and resources. To achieve a common end, you must differentiate the needs of different people.









# UNITED WAY'S IMPACT APPROACH

## Through our work, United Way aims to:

- Address problems no one organization can solve
- Develop holistic, integrated solutions that address complexities of people's lives
- Bring people together to work on issues and engage them to help create change
- Focus on what is needed and what works

## A United Way that successfully acts in an equitable, impact-oriented manner:

- Understands and communicates, internally and externally, that reducing racial and other inequities is mission-critical
- Collects, segments, and analyzes data by race/ethnicity, gender, and other identities to inform community efforts and internal operations
- Regularly engages community residents, especially those experiencing the greatest gaps and disparities and/or historically marginalized
- Uses multiple strategies to advance equitable outcomes (e.g., awareness raising, policy/advocacy, fundraising, and strategic investments)
- Invests in the capacity of other community-based entities and organizations to advance equity
- Proposes strategies processed through a racial impact analysis
- Values diversity and supports the cultural competence of staff
- Employs mechanisms for management and staff accountability around racial equity, diversity, and inclusion
- Supports the efforts of the entire organization to work on issues of equity, diversity, and inclusion



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# WHAT IS AN EQUITABLE IMPACT AGENDA?

An equitable impact agenda is a comprehensive set of interrelated focus areas (priorities), impact goals, strategies, approaches/programs, and intended results that your United Way (along with community partners) advances to create equitable community-level change that *explicitly* addresses persistent gaps and disparities. It builds on an impact agenda, by integrating an equity lens *throughout the entire process*, from engaging community residents to understand issues, to developing goals and strategies, and measuring results.





DEFINITION/ELEMENT	AN IMPACT AGENDA	AN EQUITABLE IMPACT AGENDA
FOCUS ISSUES	The community issues United Ways address to improve lives and create community change.	The community issues United Ways address to improve lives and create <i>equitable</i> community change. <i>Acknowledge gaps in access, opportunities, resources, and networks as significant reasons for disparities in outcomes between populations.</i>
GOAL(S)	Aspirational, universal, yet specific goals articulated in measurable terms.	Stated equity goal(s) to close <i>specific racial gaps and disparities related to universal goals</i> that are measurable.
STRATEGIES	Types of interventions that could be employed to make progress towards the goal and impact the cause.	Types of interventions that could be employed, <i>often prioritizing specific populations, neighborhoods, etc. experiencing disparities</i> to make progress towards the goal and impact the cause.
APPROACHES	Specific initiatives, programs, activities aligned to the stated strategies.	Specific initiatives, programs, activities aligned to the stated strategies <i>often prioritizing specific populations, neighborhoods, etc. experiencing disparities. Approaches are relevant and customized (as needed) to communities experiencing disparities.</i>
RESULTS	The measures of progress (KPIs) and outcomes against the plan.	The measures of progress (KPIs) and outcomes against the plan, including those in the targeted populations and/or historically disadvantaged populations. <i>Results are disaggregated to understand the extent to which the desired outcomes are being achieved for specific groups.</i>

Applying an equity lens to United Way's four impact areas (Childhood Success, Youth Success, Economic Mobility, and Access to Health), starts by looking at *specific* gaps in each area (access, resources, opportunities) and how this relates to the disparities in outcomes.

# An **Equitable** Impact Agenda: The Four Impact Areas

## UNITED WAY IMPACT AREAS

**Definition** - The community issues United Ways address to improve lives and create **equitable community change**.

**United Way's Role** - Prioritize areas of concern and interest by looking at data and engaging the community.

### CHILDHOOD SUCCESS

Gaps in access, opportunities, quality, and resources related to early childhood (childcare, PreK, literacy, health supports).

**Disparities in outcomes correlated with race/ethnicity, gender, income:** early development, school readiness, reading proficiency, academic performance.

### YOUTH SUCCESS

Gaps in access, opportunities quality, and resources related to quality K-12 education, school resources, student supports (internships, mentoring, jobs).

**Disparities in outcomes correlated with race/ethnicity, gender, income:** high school graduation, post secondary access and completion (two and four-year, technical) workforce entry, retention, and advancement

### ACCESS TO HEALTH

Gaps in access opportunities, quality and resources related to affordable healthcare; insurance; preventative services, and health supports (physical activity, nutrition, healthy communities)

**Disparities in outcomes correlated with race/ethnicity, gender, income:** maternal health, infant birth outcomes, chronic diseases, mental health, mortality rates.

### ECONOMIC MOBILITY

Gaps in access, opportunities, quality and resources related to education, skills/job training, financial services, and wealth creation (home ownership, entrepreneurship)

**Disparities in outcomes correlated with race/ethnicity, gender, income:** good jobs, career advancement, wage growth, and wealth generation





# ELEMENTS OF AN EQUITABLE IMPACT AGENDA

Outlined below is the process to develop and/or refine an equitable impact agenda.







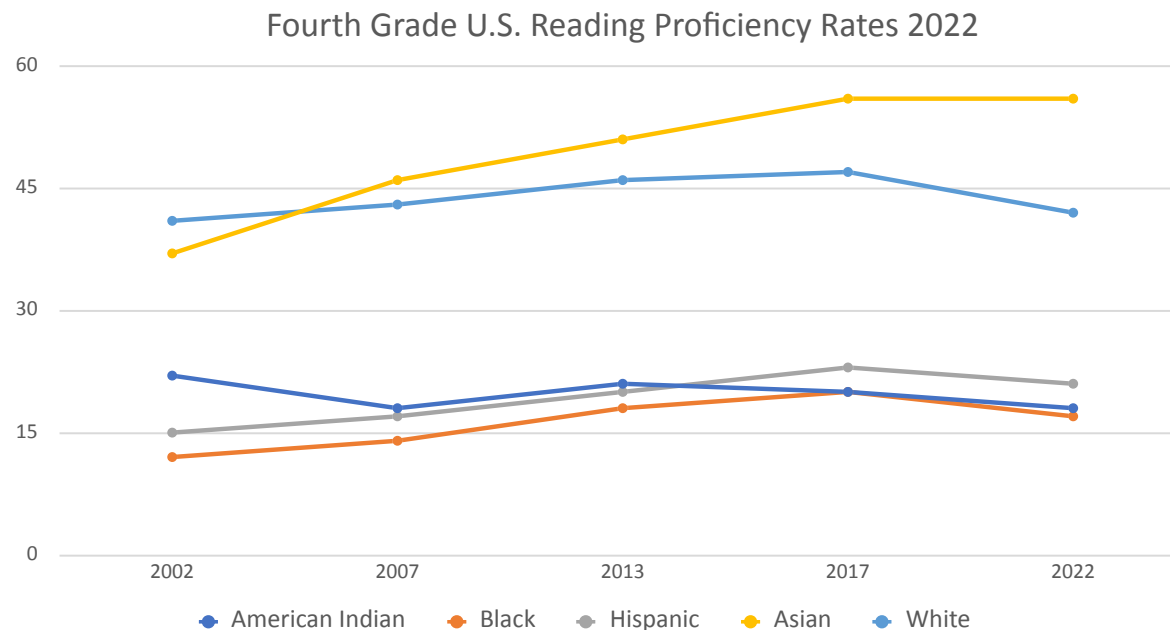
# WHY IS IT IMPORTANT TO CREATE AN EQUITABLE IMPACT AGENDA?

Without an intentional focus on equity through targeted universalism, gaps and disparities will not be resolved. Desired outcomes for all groups can only be reached if the outcome is met for communities in greatest need and furthest away from the outcome.

For example, in the United States, only 33% of fourth graders read at or above proficiency level, and a widespread challenge is to improve this so that *all* students have the reading skills essential for success in school, work, and life. However, disaggregating reading data highlights the significant, persistent gaps between students from diverse racial and ethnic backgrounds. Focusing on raising reading scores for all students, without also prioritizing closing gaps between students, increases the odds that low-income and/or students of color will continue to be left behind.

## National Data – Reading Proficiency Rates

Despite progress, significant gaps in reading proficiency remain in the U.S. across racial and ethnic groups of students.



Source – National Assessment of Educational Progress (NAEP)



### **Impact agendas that intentionally prioritize equity can help:**

- Create increased awareness of community-level disparities and those most negatively impacted by them.
- Convey to your community that your United Way is engaged, understands changing community needs and demographics, and is committed to serving all residents.
- Articulate how your United Way's and/or shared community priorities in key issues (e.g., education, economic mobility, or health) are designed to focus greater attention on gaps and disparities.
- Convey the importance of employing universal and targeted goals, strategies, and outcome measures so your efforts improve conditions for all and close persistent gaps between groups.
- Provide opportunity for stakeholder (community residents, advocates, donors) engagement, input, and buy-in for your work, especially marginalized communities, those not historically engaged by your United Way, and/or those currently experiencing disparities.
- Make the case for why changes are needed to achieve United Way/shared community goals.
- Advance a holistic view that integrates efforts across impact areas in recognition that socioeconomic disadvantages and advantages tend to reinforce each other (e.g., housing, employment, or education).
- Continually assess and update your strategies and approaches based on evolving community needs and changing demographics.

## **EXAMPLE: APPLYING A RACIAL EQUITY LENS TO CHILDHOOD SUCCESS**

**Taking an equity lens to the Global Impact Agenda's Community Impact Area for in Childhood Success aims to shift the focus from individual experiences to place stronger responsibility on the structures, institutions, policies, and practices that contribute to current unequal conditions and disparities in outcomes.**

**Research and lived experiences of students and their families document that students of color, especially those who reside in under-resourced communities, on average, have different and unequal access to educational resources and opportunities in comparison to their white and Asian counterparts. This includes access to early childhood programs, high-quality K-12 schools, rigorous curricula, enrichment activities, informal networks, and additional supports (e.g., tutoring). As a result of historical and current institutional and implicit biases within the educational system, BIPOC students are more likely to experience poor educational outcomes, including grade retention, school suspension, or expulsion, dropout, and lower rates of post-secondary attainment.**

**The lack of access to quality early childhood programs based on race/ethnicity, affordability, and availability limit the potential of these programs to improve kindergarten readiness and create more equitable educational outcomes in the United States. Although all families struggle to access quality programs, these challenges are intensified for low-income and/or children of color. Without acknowledging and working to solve these disparities, universal goals cannot be achieved.**



**TAKE STOCK**

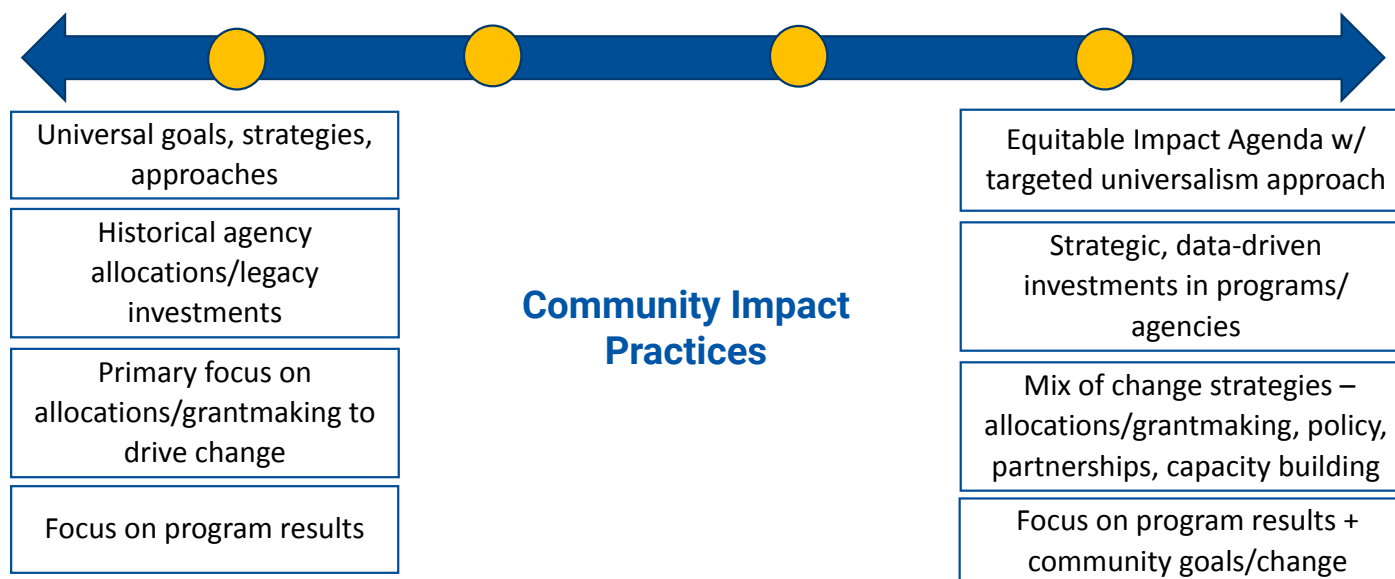


# STEP 1: DISCOVER PRIORITY ISSUES

## Identify Your Internal Starting Point

United Ways are diverse in the approach to impact and the work is evolving. Leading with equity is more likely when underlying practices (e.g., strategic resource investments) support this. Evolving our work means generally centering the needs of community residents, broadening strategies to achieve change at greater scale, and considering all the potential roles your United Way can play to advance community impact. This work will always be a work in progress, rather than a clearly defined endpoint. Look at the continuum below and assess where your United Way practices most align.

## Locate Your United Way on a Continuum of Community Impact Practices



### Tips for using the continuum above:

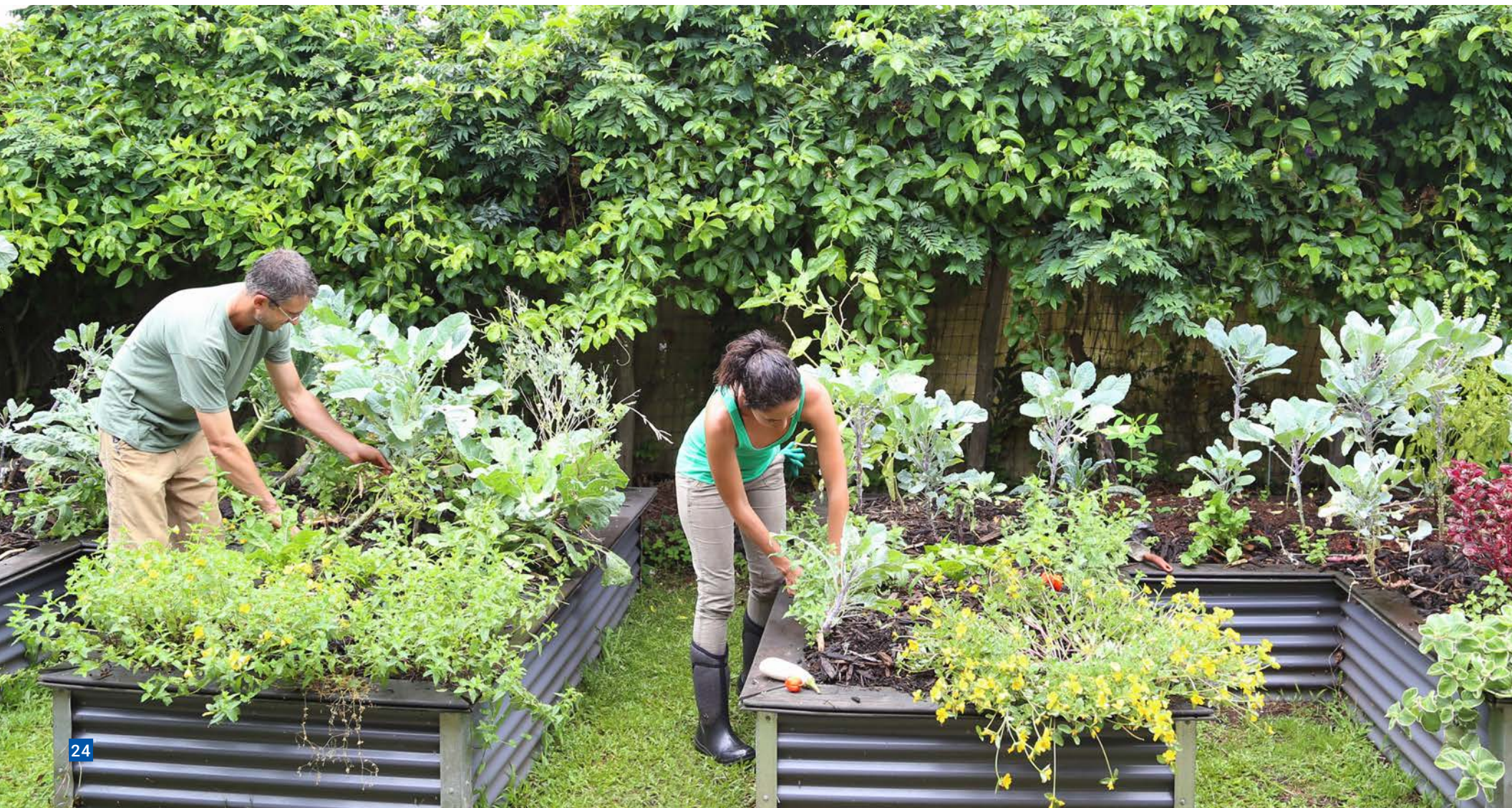
- Set aside specific time, as part of an existing team meeting or as a stand-alone activity, to use this continuum as a starting point for group conversation and ongoing planning.
- Provide everyone an opportunity to *individually* reflect on how they would rate your United Way, at least five minutes.
- Debrief as an entire group, using some/all of the questions below:
  - In what areas is our United Way operating in more established/traditional ways, in what areas are we expanding/broadening our work?
  - What areas offer the greatest opportunity for our United Way to evolve our impact practices? To integrate equity as a core principle?
  - What areas create an opportunity for incremental improvements?
  - What supportive conditions exist to make change? What are potential barriers?
- Use this continuum to generate conversation and shared agreement (rather than right/wrong answers) that can inform your more specific work to create/strengthen an impact agenda.



## Assess Internal Engagement and Awareness of Your Impact Agenda

United Ways are made of diverse teams with many core responsibilities that are all essential to advancing the mission. The core mission-driven work is most often connected to the defined priorities that are outlined in the organization's impact agenda. Although not everyone in the organization is directly responsible for advancing the impact agenda, all staff should have some degree of awareness and lead functional areas that are vital to the success of your United Way's community work.

Conduct a stakeholder analysis across functional areas/departments in your United Way to identify the extent to which cross-functional staff are aware of and see themselves as integral to fulfilling the strategies outlined in the impact agenda. Use the assessment below to define the ways that staff across departments are currently engaged. Use the findings to identify opportunities





	RESOURCE DEVELOPMENT	HUMAN RESOURCES	FINANCE	MARKETING/ COMMUNICATIONS	POLICY AND ADVOCACY	SENIOR LEADERSHIP/ EXECUTIVE OFFICE
Department/staff has no awareness or exposure to the impact agenda						
Impact agenda is shared department/staff on a regular basis, including progress updates						
Department/staff involved in development of the impact agenda						
Department/staff have clear understanding of how their functional area work contributes to the impact agenda/overall community change work						
Department/staff have specific accountabilities related to implementing the impact agenda (e.g., fundraising, policy development/alignment, grants management)						
Department/staff can clearly convey to other stakeholders how the impact agenda is helping to advance the mission and community change						

## Assess Current Diversity, Equity, and Inclusion (DEI) Practices

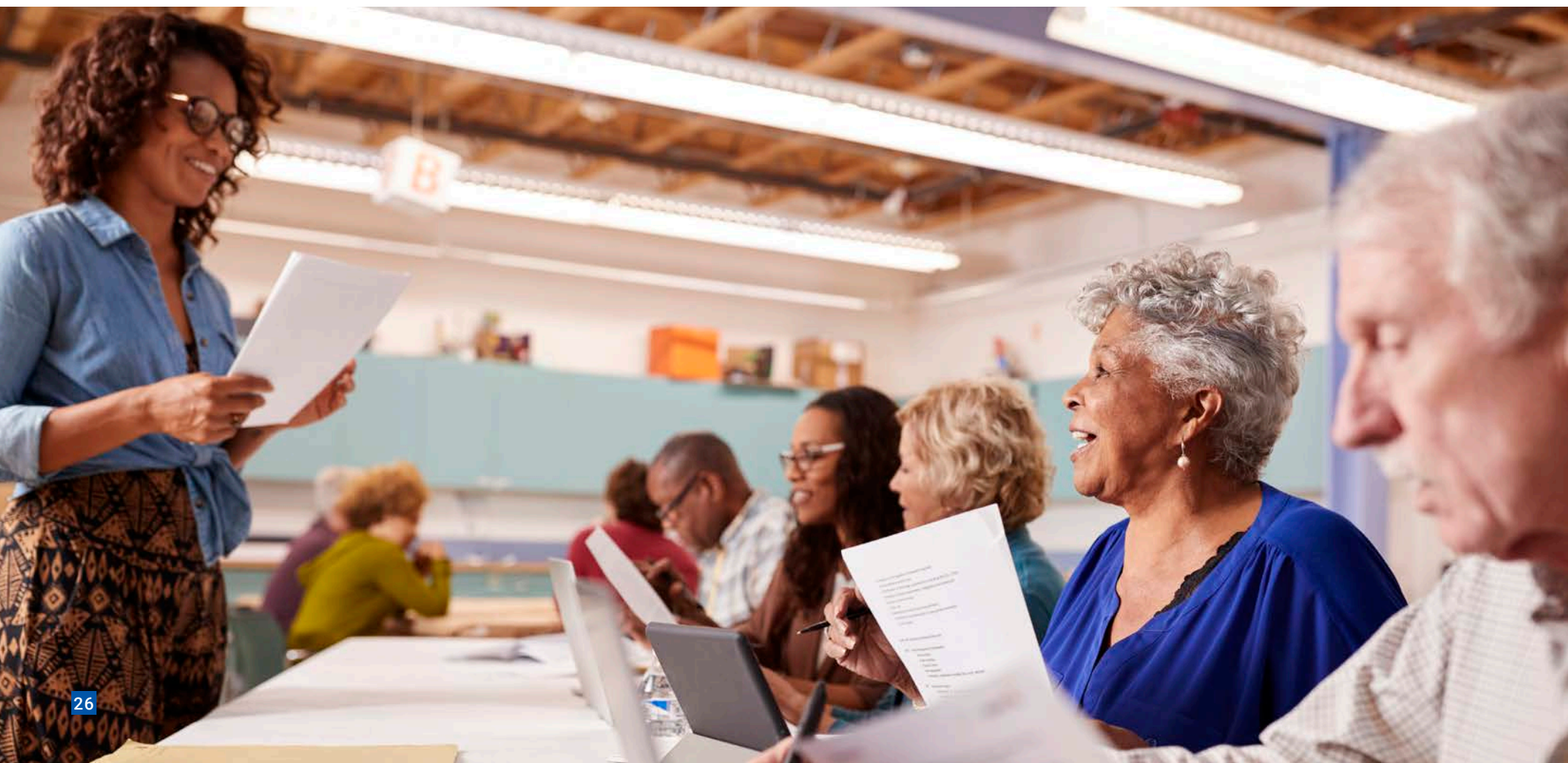
Determine what progress your United Way has made to meet the equity provisions of United Way's Membership Requirements:

- Develop, maintain, and publicly post an organizational position opposing all forms of racism.
- Provide annual racial equity training for staff and board members.
- Develop and use racial equity as one of the criteria for prospective community investments.

Go Deeper: Explore where your organization falls on the Race Matters Institute/Just Partners' [Color-Blind to Equity-Focused: An Initial Organizational Assessment](#)<sup>1</sup>

**Use the checklists on the next page to assess your organization's progress.**

**From that starting point, consider the implications for your impact agenda.**







## COLOR-BLIND

If you primarily placed your United Way on this end of the continuum, current or historical characteristics of developing an impact agenda might include the following:

- Disaggregated data may not be regularly collected to understand differences in opportunities and outcomes across different groups that make up the community served. Instead, aggregated data is more commonly used to assess community conditions.
- Your United Way might not regularly engage diverse community members to understand how their lived experiences compare with aggregated data across all groups.
- **You may not have a clearly outlined impact agenda.** If you have an impact agenda, it likely includes universal goals, strategies, and approaches and does not differentiate based on different starting points.
- Leadership and staff may feel that universal approaches are the best way to engage the community broadly and may not be comfortable discussing differences and disparities.
- Leadership and staff may not have the training, language, and tools to consider issues of DEI in the organization's work.
- Funded grantees may focus on broad programmatic outcomes. As a result, funded programs may not have strategies and approaches that are intentionally designed to address gaps and disparities experienced by specific populations.
- Grantees may not be asked about their internal organization's demographics, including board membership, executive/senior leaders, and staff. As a result, they may not reflect the community they serve and/or share or understand the lived experiences of program participants.



## DIVERSITY-ONLY

- Leadership and staff likely share a belief that diversity is important, but this may not directly inform the specific approach to developing or refining your United Way's impact agenda.
- You might use the terms diversity, equity, and inclusion interchangeably without making explicit distinctions between how each shows up in your approach to community impact.
- If you have a developed impact agenda, it might include data on community-level disparities, but this information does not inform subsequent goals, strategies, approaches, and expected outcomes.
- Your focus on representative diversity could be viewed as sufficient and not lead to deeper understanding of structural and institutional inequities and their lasting impact on marginalized communities.
- You may collect disaggregated data on program participants from funded programs or agencies, but this information may not be readily used to inform your overall impact approach and/or resource investments.
- Funded grantees are expected to serve community residents who reflect the diversity of the community, including those experiencing disparities, but they likely focus on broad programmatic outcomes.





## RACE-TENTATIVE

- Your United Way leadership and staff believe that diversity, equity, and inclusion are important and work to close racial gaps and disparities. You invest in DEI training and are committed to understanding more deeply how to integrate a DEI lens into your organization's work.
- Your United Way regularly collects community-level data to understand gaps and disparities. You use this information in your impact agenda to highlight community-level disparities and to frame why priority issues are important.
- Funded grantees are expected to disaggregate and report program data by race and ethnicity and to identify gaps or disparities between population groups in terms of program access and outcomes. As a result, you possess the data necessary to understand community needs, potential racial gaps, and to the extent to which programs you fund are/are not addressing these issues.
- Funded grantees are expected to serve community residents that reflect the diversity of the community, including those experiencing disparities, but they likely focus on broad programmatic outcomes.
- Your United Way and grantees have a foundational understanding of racial equity's importance but may not be certain how to operationalize equity to address gaps or disparities in specific impact goals, strategies, approaches, and expected outcomes.
- Your United Way has strong internal buy-in for the importance of addressing equity, but leadership and staff may struggle to create compelling, effective messaging that brings other stakeholders along (e.g., board members, funders, community members, partners).



## EQUITY-FOCUSED

- Your United Way leadership and staff believe that diversity, equity, and inclusion are important and intentionally focus on closing racial gaps and disparities. Leadership works to integrate equity into organizational strategic planning and expects all staff to apply a lens of equity and inclusion to their work.
- Leadership and staff have made progress developing messaging to make the case for equitable change with key stakeholders (e.g., board members, funders, community members, partners).
- You invest in DEI training and are committed to understand how to integrate a DEI lens into your organization's work more deeply.
- Your United Way regularly collects community-level data to understand gaps and disparities. You use this information in your impact agenda to raise awareness, to frame why prioritizing these issues is important, and to inform your impact strategies, goals, approaches, and expected outcomes.
- **You have a well-defined impact agenda with equity integrated throughout.** Your impact agenda includes universal and specific equity goals. Strategies and approaches are differentiated (as needed), based on different starting points of diverse populations in your community.
- You have regular, ongoing mechanisms for engaging all community residents that reflect the makeup of your community. This includes intentional strategies to ensure that the lived experiences of historically marginalized groups are surfaced and inform your work.
- Your investment approach derives from your impact agenda and includes specific strategies for closing gaps and disparities. This might include ensuring that programs you fund address specific disparities and removing funding barriers for organizations led by individuals historically underrepresented in leadership positions, including BIPOC, women, and individuals with disabilities.
- Your impact agenda includes a mix of short- and long-term strategies to address immediate resident needs (e.g., temporary shelter) and change underlying community conditions (e.g., housing affordability).
- You use disaggregated data, data collected from programs, and community data to inform processes and make investments to close disparities, particularly for BIPOC residents, women, and individuals with disabilities.
- Grantees are expected to collect, use, and report disaggregated data; to identify where gaps or disparities exist in program access; and to introduce strategies to close these gaps based on community input.







# STEP 2: COLLECT AND ANALYZE DISAGGREGATED COMMUNITY AND DONOR DATA

## Identify and Analyze Community-Level Data

Start broadly by looking across your community to assess what data is available. Community-level data can provide a stronger understanding of your starting point, including the overall context in which you operate (e.g., demographic trends, educational attainment, employment, disability status). The [U.S. Census American Community Survey Data Profiles](#) provide social, economic, housing, and demographic data that is a good starting point for understanding your broader community context.

Aggregated data on specific issues (e.g., education, health, economic well-being) helps your United Way understand the presence, scope, and prevalence of concerns; their overall impact on community residents; and how residents prioritize issues based on their lived experiences. Aggregated data can help identify areas to look for potential disparities.

### Examples:

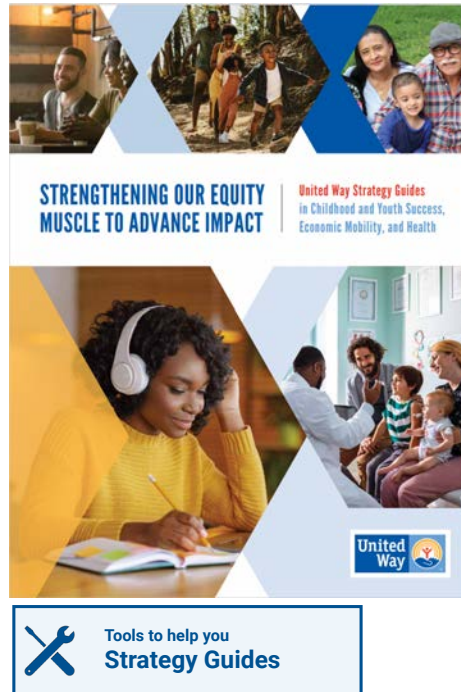
- Your United Way surfaces overall low levels of reading proficiency rates in the surrounding schools/districts. You access school report cards, disaggregated by student characteristics (e.g., race/ethnicity, SES, ability status, English Language Learners) to understand which students experience the greatest disparities.
- Your United Way serves a geography where the average median income levels are below the national average; you dig deeper to understand which aspects of the population are below the median and which are at/above the median.

Look at all impact areas where you may want to focus. United Way's Equity Strategy Guides are a tool to help you with this step.





# Tools to help



## Use Disaggregated Data

Consistent use of disaggregated data helps surface persistent racial gaps and disparities, especially those borne out of historic and systemic patterns of discrimination.

Use disaggregated data to:

- Understand who is most impacted by issues, including historically marginalized and/or disadvantaged populations (e.g., race/ethnicity, gender identity, sexual orientation, ability status, place of residence).
- Identify underlying and systemic issues.
- Identify root causes of gaps and disparities so that United Ways can work with other stakeholders to develop equity-centric goals and strategies (see Step 3).
- Provide an opportunity to consider how different constituents, especially those most impacted, might have a vested interest in working on the issue.

Tracking disaggregated data, as well as community indicators and qualitative measures, can help reveal the connections between root causes and population level outcomes.

For example, United Ways working on Childhood Success might examine disaggregated data related access and opportunity, in addition to outcomes, to make important connections between the two. The Equity Strategy Guide for Childhood-Youth Success includes the indicators below to draw connections between differences in access to quality early childhood programs and schools, and disparities in child/student outcomes like meeting development milestones and reading on grade level:

- Availability of quality, affordable childcare (e.g., informal, center-based care, 0-3 years) and preschool programs (3-5 years)
- Percent and number of children enrolled in early childhood programs (0-5 years)
- Percent of children who achieve key developmental milestones
- Percent of children prepared for kindergarten (i.e., proficient in school readiness assessments)
- Percent and number of students attending elementary schools that are low-performing and/or high poverty (i.e., not meeting state school accountability requirements and/or more than 40% of students qualifying for Free and Reduced Price Meals)
- Percent of students reading at third grade reading proficiency rates

### Questions to ask when gathering data can include:

- What does research say about the scope and dimensions of the issue generally?
- What does local research say about which populations in our community are most affected by the issue, and which aspects of the issue are most problematic for them?
- What current disparities based on race/ethnicity (or other identities) in the impact areas does your United Way want to address?
- What are the historical and current reasons for these disparities?
- What more could be done to address these gaps in your community, specifically by your United Way?

## Assess Data Gaps

Data gaps might surface in the initial information gathering process that could serve as foundations for the work your United Way takes on once you're ready to identify priorities and/or develop strategies and approaches. Using the example of Childhood Success above, your United Way might discover a lack of data related to the availability of community-based childcare programs and decide to conduct community asset mapping to obtain current information as one of your impact strategies or approaches.

Longer-term strategies might include investing in data collecting and analysis capacity at your United Way or creating data partnerships with local institutions of higher education and/or advocacy and research focused local nonprofits to fill data gaps.





## Understand Donor Interests

By deepening understanding of community issues, your United Way can increase awareness, empathy, and help residents, including donors, connect to and collectively problem-solve on the issues that matter most to them. Your current donor database, market research, engaging current/potential donors directly, and using prospecting tools can all help you understand what motivates current and potential donors. Understanding who your donors are and their interests can help strengthen relationships that develop a foundation for long-term support and donor retention.

Additionally, you should assess how you can expand your donor base.

## Expand Donor Bases and Engage BIPOC Donors

Equity should be integrated into processes to not only champion equitable outcomes as a result of your organization's work, but also as a process incorporated into donor recruitment and fundraising efforts. Attracting BIPOC donors, as well as other populations such as LGBTQ people or those with disabilities, requires a long-term commitment to changing organizational culture and building trust with groups overlooked in the past.

BIPOC people are often more likely to provide direct financial support to close friends, family, and community members rather than through donations. It's crucial to engage BIPOC people in a manner that will spark their interest in participating and donating to your United Way.

Strategic partnerships can help introduce you to potential BIPOC donors. Identifying influential organizations, such as churches, or leaders in a community can help nurture relationships and encourage participation in advocacy and fundraising efforts.

It's important to reach potential BIPOC donors in the areas in which they engage, live, and connect—whether those be social networks, radio stations or communications outlets, or physical locations. In doing so, organizations should demonstrate they understand the needs, values, traditions, and cultures of the potential donors while also engaging their emotions.

Donors often want those involved in the organizations they support to have their same lived experiences. As a result, BIPOC donors can

have trouble envisioning how they can engage with an organization if its leadership and those in development are mostly white. That often means providing extra resources to develop BIPOC leaders and ensure they oversee initiatives.

Participatory grantmaking, or the process of involving community members in funding decisions, can also help spark their interest and democratize giving practices. Providing support for participants, whether through coaching or services like childcare, during engagement sessions can help boost participation.

## Tap Into Insights from New Donors

Surveys of current and potential donors can also provide insights into how to better engage donors or expand your reach.

Questions to incorporate in surveys, as outlined by the Network for Good, can include:

- Why do you donate to our United Way
- Of the programs and services your gifts support, which are most important to you?
- To what degree do you feel your donations make a difference, and how so?
- How do you prefer to give?
- To what other organizations or causes do you donate?
- How would you rank your level of satisfaction with giving to our organization?
- What types of communications would you like to receive, and how often?

## Identify Overlooked or New Donors

Additionally, your United Way may overlook BIPOC donors or those in other populations already in your database. Asking participants to share information about race and ethnicity through surveys, event registrations, or in-person conversations can help build out the information you collect and provide a stronger understanding of your donor demographics.

Publicly available information can also provide insight and data about potential donors and supporters. Social media platforms such as LinkedIn and organizational webpages can provide information about board composition and surface issues members are passionate about.

Donor lists of other organizations can also provide insight into members with shared interests and their networks.

Though research can help uncover valuable information, it's important you approach those you may identify in a culturally appropriate, sensitive manner.

## TAKE IT A STEP FURTHER: DATA SOURCES

Explore these additional selected resources, also included in [United Way's Equity Strategy Guides](#), for potential education, economic mobility, and health data about your community. Refer to the Strategy Guides for additional data sources.

### Community Data Sources

- [U.S. Census Bureau](#). Contains reports, aggregated data and searchable, customizable data on key economic indicators, including median income, poverty, employment, labor force participation, and hiring.
- [Policy Link](#). Provides data, strategies, and tools to advance policies and practices that increase equitable economic mobility.
- [KIDS COUNT Data Center](#). Compilation of key data to highlight the well-being of children, youth, and families in the United States using a range of indicators across four domains: education, health, economic well-being, and family/community.
- [Measure of America](#). Contains tools and reports to understand state of well-being in the United States using a range of health education, and income indicators.
- [County Health Rankings and Roadmaps](#). Provides data on multiple indicators that influence health and health equity; provides county health rankings based on a range of indicators that comprise the social determinants of health.
- State/local departments of education, health, and labor.

### Data for Decision-Making

- [What Can We Do About Biases Baked into Data?](#) Robert Wood Johnson Foundation.
- [By the Numbers: Using Disaggregated Data to Inform Policies, Practices, and Decision-Making](#). The Annie E. Casey Foundation.
- [Charting a Course for an Equity-Centered Data System](#). Robert Wood Johnson Foundation.
- [Data-Sharing Collaboratives: The Importance of Sharing Data](#).

### Donor Data Sources

- [How to Connect with Donors of Color](#). Chronicle of Philanthropy.







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## STEP 3: ENGAGE THE COMMUNITY TO DETERMINE PRIORITIES

As part of priority setting, convening residents, particularly BIPOC and other diverse stakeholders, provides vital perspectives and the ability to tap into insights from lived experiences.

Listening to your stakeholders—including community residents, companies, employees, individual donors, board members, and volunteers—helps deepen your United Way’s understanding of aggregated and disaggregated community-level data. While aggregated data can help your United Way understand the scope of an issue, hearing from community residents provides opportunity to understand how those issues play out in the lives of specific individuals who might be deeply impacted by issues but are often left out of decision-making processes. Effective and ongoing community engagement provides opportunities to hear what residents, especially those experiencing disparate outcomes, view as challenges, concerns, needs, and potential solutions.

Listen to those most affected by the issues you seek to address:

- What are their biggest concerns?
- What are the underlying causes?
- What do they see as solutions?
- What has/has not worked?

Use multiple approaches (e.g., online, in-person) for gathering data. Conduct interviews, convene focus groups and/or community conversations, provide questionnaires, or other information gathering methods that make it easy for community members to engage. Enlist community partners or trusted local leaders to assist in reaching key community members. This is a particularly important strategy if your United Way does not have a solid history of relationship-building and engagement in the communities/specific populations that you are trying to engage.

Examples of community-level organizations with which you can potentially partner or that can support access to stakeholders, especially if you haven’t established trust in these spaces, might include:

- Historically black universities and colleges (HBCUs)
- Churches and local faith-based organizations
- Local chapters of national advocacy/civil rights groups that advance the interests of historically and/or marginalized populations (e.g., NAACP, Unidos US, Urban League, National Organization for Women, Human Rights Campaign)
- Local businesses and markets, cultural organizations, and recurring events or festivals







Keep in mind, long-term relationship-building is essential to effectively engage community-level stakeholders in your impact work and maintain their trust. Explore ideas to help support continued community engagement to make progress towards a goal or impact issue in Playbook Three (forthcoming).

## EXAMPLE: ENGAGING COMMUNITY IN ACTION

In striving to transform the organization in its 2022 funding efforts, the United Way of Greater Cincinnati (UWGC) recognized that to create true change in its community, the community would need to drive its work and investments by informing which challenges would need to be addressed and identifying solutions that would work for them.

To do so, UWGC engaged 405 community residents and 108 community partners through mixed methods such as surveys, one-on-one conversations, community conversations, public data gathering and analysis, and feedback from community partners.

This helped UWGC understand the root causes of economic mobility and well-being, identify community assets and gaps, and envision how success could materialize over a two-year period. As a result, engagement surfaced top challenges and issues to address, including financial well-being, employment, health and wellness, social connectedness, education, and social and emotional wellness for youth.

UWGC refined this information to develop themes to drive action and possibilities for systems change and shared it through public opportunity briefs.

UWGC restructured its grantmaking to create six systems change portfolios to explicitly focus on priorities that emerged from this effort, including Next Gen Success; Equitable Economic Mobility; Housing First; Ready Kids, Resilient Families; Improved Prevention, Stronger Communities; and Responding to Community Need.

For additional examples, see how the United Ways of Southwest Michigan and the Piedmont bolstered their community input while developing their impact agendas in the examples provided at the end of this playbook.

## TAKE IT A STEP FURTHER: CONNECT WITH YOUR COMMUNITY

Additional resources to explore ways to engage your community stakeholders include:

- [United Way Equity Framework – Community Mobilization and Engagement Lever](#)
- [United Way Equity Framework – Discussion Guide \(see Community Engagement and Mobilization Questions\)](#)
- [United Way Equity Webinar Series – Leveraging Community Engagement and Mobilization to Advance Equity\\*](#)
- [Community Toolbox: Encouraging Involvement in Community Work. Center for Community Health and Development at the University of Kansas.](#)
- [Facilitation Guide for Community Engagement – National Gender and Equity Campaign in Minnesota](#)











**TAKE ACTION**



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# STEP 4: DIAGNOSE CAUSES, SET GOALS, AND DEVELOP STRATEGIES

## Diagnose Root Cause

Understanding root causes of issues is crucial as this approach can surface systemic challenges and barriers for which you can create systemic solutions. Rather than simply mitigating the effects or symptoms of an issue, you can work to treat its underlying causes.

Identifying root causes can also help shift focus from the outcomes and overemphasis on individuals impacted by an issue to the economic, historical, social, community conditions, and policies that help create the issue.

Consider using a backmap as a tool to help you surface root causes of gaps and disparities that surfaced during your data analysis. A backmap works backwards from a data point to understand broadly underlying issues that contribute to the current outcome.

Backmaps can help:

- Place disparities in historical, systemic, and community context.
- Identify underlying causes of disparities and help build structural stories.
- Surface many factors that contribute to existing disparities.
- Identify intervention points where your United Way can effectively engage and make a tangible difference.

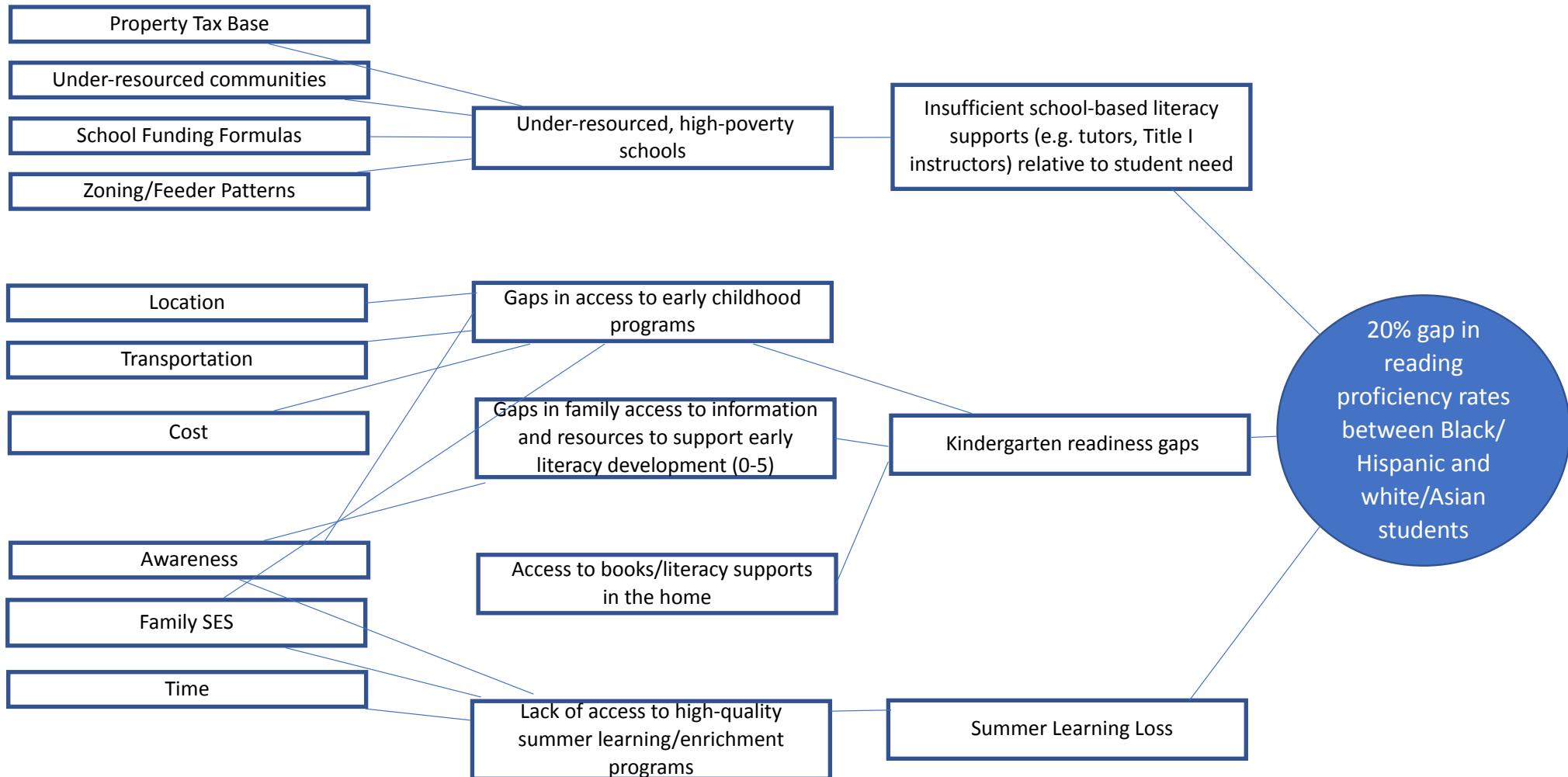
The example backmap below highlights gaps in reading proficiency rates between Black/Hispanic and white/Asian students at a starting data point. Working backwards and continually asking “why?” can help surface underlying issues including differences in school resources, access to quality early childhood programs, reading materials in homes, kindergarten readiness, cost, transportation, and more.

Based on this backmap, a United Way might work with local Title I schools to provide volunteer tutors to supplement existing reading programs, or they might work with local community-based organizations to increase the availability of summer learning programs in communities with the lowest reading proficiency scores in the school district. They might also advocate for increased state investments in early childhood programs.



Backmaps can be a helpful discussion tool. However, they should only be used after data analysis is complete and you have engaged residents to surface and deepen your understanding of community issues.

Having access to qualitative data from listening sessions aids in balancing the overemphasis or utilization of quantitative data that lacks the depth and context to fully understand issues.





### Questions that might surface from the backmap above include:

- How should this information inform the development of our goals, strategies, and approaches?
- Are there partners that might help in addressing secondary issues?
- Are there state and local policies we might advocate for to address secondary issues?
- Is there work our United Way and/or other organizations are already doing to address any of the issues identified?
- Would our United Way be viewed as credible in working to address the issues identified?
- Are there lessons learned from other efforts that might aid in producing more equitable outcomes?

## TAKE IT A STEP FURTHER: ROOT CAUSES

Explore additional resources and tools to help you understand community issues:

- [Racial Equity Index](#). National Equity Atlas.
- [Community Toolbox: Assessing Community Needs and Resources](#). Center for Community Health and Development at the University of Kansas.
- [Racial Equity Backmap](#). Race Matters Institute.



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## STEP 5: IDENTIFY PRIORITY ISSUES

Setting priorities serves as a signal to residents and other constituents that your United Way understands what matters most to the community and is committed to addressing those needs and concerns.

Use the information gathered (data and input from community residents, donors, and organizations) and the backmap activity to identify priority issues and set community and/or United Way-specific goals.

Priorities are often set based on multiple factors. As fundraisers, United Ways rely on donors to support our impact work, which can lead to overemphasizing donors' interests as a deciding factor in what work we take on. Community residents and donor concerns may align in some areas, and not in others. There may be issues that are of acute concern for community residents that donors, especially if they do not live in and/or are not familiar with the community, may not be aware of. Should that be the case, it's important to bring along existing donors by making a compelling case for addressing disparities in a way that connects to their stated interests. This also provides an opportunity to build or strengthen donors' awareness of inequities of which they may be unaware of and/or to which they may inadvertently contribute.

Your United Way can also demonstrate your commitment to equity by prioritizing for action issues where there are persistent gaps and disparities that reflect the top concerns of community members.

Other critical factors to consider in identifying priorities include leadership commitment, your organizational expertise and capacity, resources available, your organization's credibility on the issue, alignment with existing impact work, and the extent to which your United Way can make a meaningful difference.

Additional considerations might include whether working on the issue

creates opportunities for strengthened community engagement and/or the ability to attract new sources of funding to address inequities.

To drive equitable educational outcomes, for example, United Ways could decide to focus on closing school readiness gaps as a priority issue. Taking a targeted approach to the universal goal of ensuring school readiness might mean ensuring specific children experiencing disparities (BIPOC, low-income, English language learners) are prepared for kindergarten.







Focus Issue Example: Childhood Success

The example below demonstrates how to build an equity-focused impact agenda to support Childhood Success. In this example, the priority issue identified is school preparedness gaps that prevent children from being ready for kindergarten. **As you move through the rest of the Playbook, note how the remaining sections are filled in based on this priority focus.**

FOCUS ISSUE	GOAL	STRATEGIES	APPROACHES	RESULTS
Children aren't prepared for kindergarten and there are school readiness gaps.				

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## STEP 6: SET UNIVERSAL AND TARGETED COMMUNITY IMPACT GOALS

As part of your priority setting, determine where your United Way is well-positioned to address racial disparities, particularly where systemic inequities are historically present. Ideally, you will create (or refine) *universal goals* that articulate aspirations for the entire community (or specific entire populations, e.g., children ages 0-5) and *targeted goals* that advance equity for specific populations that are furthest from the goal, based on current or historical disparities.

Targeted goals are critical to address equity. They call attention to disparities that particular populations experience, and articulate the need to focus strategies, resources, and time to ensure that specific communities are not left behind, even as conditions improve for the community overall as progress is made towards universal goals.

According to [The Belonging Institute](#), organizations can utilize five steps to integrate a targeted universalism approach:

1. Establish a universal goal based upon a broadly shared recognition of a societal problem and collective aspirations.
2. Assess the general population's performance relative to the universal goal.
3. Identify groups and places that perform differently with respect to the goal and disaggregate them.
4. Assess and understand the structures that support or impede each group or community from achieving the universal goal.
5. Develop and implement targeted strategies for each group to reach the universal goal.







Goal Example: Childhood Success

As an example, United Way’s Global Impact Agenda in Childhood Success aims to ensure that all children are ready for kindergarten and are successful in elementary (primary school). In the United States, education data documents significant readiness gaps for low-income and Black and Latino children. As such, United Way’s Equity Strategy Guides include a specific goal (outcome) to close school readiness gaps for BIPOC children.

The chart below builds on the example equitable impact agenda for Childhood Success by adding universal and targeted goals—all children test proficiently on school readiness assessments by the end of kindergarten and close readiness gaps for BIPOC children by 30% over three years, respectively.

FOCUS ISSUE	GOAL	STRATEGIES	APPROACHES	RESULTS
Children aren’t prepared for kindergarten and there are school readiness gaps.	<ul style="list-style-type: none"><li>• 100% of children test proficient on school readiness assessments by the end of kindergarten.</li><li>• Close readiness gaps for BIPOC children by 30% over the next three years.</li></ul>			



## TAKE IT A STEP FURTHER: UNIVERSAL GOALS

Additional resources to apply the concept of targeted universalism:

- [Equity Strategy Guides in Childhood/Youth Success, Economic Mobility, and Health](#)
- [Creating a Targeted Universalism Framework](#). Othering and Belonging Institute.
- [Targeted Universalism: Policy and Practice](#). Othering and Belonging Institute.
- [Equity 2.0. What is Targeted Universalism and How Does It Address Inequality?](#) Othering and Belonging Institute.

For insights on how United Way of Southwest Michigan and United Way of the Piedmont identified targeted and impact goals for their impact agendas, view the equity integration case studies on page [72](#).





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# STEP 7: CREATE THE PLAN - IDENTIFY EQUITABLE STRATEGIES AND APPROACHES

## Develop Equitable Strategies

Strategies are a set of related interventions that are developed and implemented to help reach or make progress towards a goal and impact the issue on which you are working. Strategies articulate *how* you will accomplish stated goals.

When creating strategies, it's important to be specific in stating how they connect to stated equity goals and specific barriers identified using a backmap or other root cause analysis. Your strategies should collectively address aspects of the issues you are addressing. To develop equitable strategies, you might employ levers from United Way's Equity Framework including communications/awareness raising, policy and advocacy, community engagement, data, strategic grantmaking, and local capacity building. Using multiple levers can help drive broader scale change and foster efforts that go beyond direct services and support.

At this stage in your work, it is important to continue to engage community members, including those with lived experiences, for help in determining the right strategies and approaches and to determine ways to measure outcomes, particularly for those most affected. Engage diverse donors to understand which strategies they might have the most interest in resourcing, especially those aligned with their business interests and/or social responsibility goals.

Develop specific strategies for which multiple approaches can be taken to achieve the goal.

## Base strategies on:

- **Identified barriers** (current and historical) and actions your United Way and partners can take to help achieve the target outcome
- **Data** assessing the prevalence of issues, including the existence of gaps
- **Identified root causes** and systemic conditions that have contributed to existing gaps and disparate outcomes
- **Diverse, lived experiences** of community members
- **Existing research** on what currently works, especially for closing gaps and disparities for historically marginalized groups. Avoid overreliance on quantitative measures, balance equal emphasis on the approaches to collect and value lived experience.
- **Bright spots and success stories**, including United Way examples that centered equity or how gaps and disparities have effectively been addressed
- **Existing efforts** that can be leveraged such as United Way programs or diverse partnerships or organizations doing intentional work to address disparities or impact targeted goals United Way and community capacity including nonprofit organizations (include organizations that center marginalized communities in their work, e.g., people with disabilities, BIPOC, LGBTQ+ individuals, etc.)
- **Opportunities for meaningful volunteer engagement** of diverse stakeholders as well as targeted engagement with affinity groups donor interest and leveraged affinity engagement (identify volunteer outreach/engage organizations that center marginalized communities in their work, e.g., people with disabilities, BIPOC, LGBTQ+ individuals, etc.)





Strategy Example: Childhood Success

In our Childhood Success example, increasing access to high-quality early childhood experiences for BIPOC children is a research-based strategy to address a gap for a specific population. The strategy is focused but also broad enough to break into more discrete activities for strategic investment, partnerships, and individual engagement.

FOCUS ISSUE	GOAL	STRATEGIES	APPROACHES	RESULTS
Children aren't prepared for kindergarten and there are school readiness gaps.	<ul style="list-style-type: none"><li>• 100% of children test proficient on school readiness assessments by the end of kindergarten.</li><li>• Close readiness gaps for BIPOC children by 30% over the next three years.</li></ul>	Increase access to high-quality early childhood programs, especially for BIPOC children.		

## Develop Equitable Approaches

Approaches are elements of an overarching strategy. Approaches are important to get started in making progress towards strategies in pursuit of a goal. They include specific initiatives, programs, and activities aligned to the stated strategies that will help your United Way make progress.

Equity is both an outcome and a process. As approaches are designed, consider what is learned through data and lived experiences to further understand gaps and opportunities. Equitable approaches incorporate what is known about specific communities experiencing disparities to customize programs and activities so that they are more likely to be successful.

While many initiatives start out as approaches, as the work evolves and matures, strategies should be considered as potential next steps to broaden impact to systems and structures that limit opportunity. Further, high-level strategies can easily be scaled and localized. Examples might include considering cultural practices, current or historical issues with institutional trust, language preferences, and the location and availability of support services/services/resources.





FOCUS ISSUE	GOAL	STRATEGIES	APPROACHES	RESULTS
Children aren't prepared for kindergarten and there are school readiness gaps.	<ul style="list-style-type: none"> <li>• 100% of children test proficient on school readiness assessments by the end of kindergarten.</li> <li>• Close readiness gaps for BIPOC children by 30% over the next three years.</li> </ul>	Increase access to high-quality early childhood programs, especially for BIPOC children.	<ul style="list-style-type: none"> <li>• Map availability and quality of early childhood programs in communities of color and target investments to address gaps in quality and access.</li> <li>• Advocate for increased state subsidies for families that increase the affordability of childcare, early childhood, and Pre-K programs serving 0-5 years old.</li> <li>• Invest in training and professional development for early childhood educators across diverse settings (e.g., family/friend/neighbor care, childcare, Pre-K); including training on implicit bias and cultural competency training.</li> <li>• Engage families of young children (0-5 years), especially in low-income neighborhoods, to understand how ongoing barriers limit access to quality childcare, early childhood, and Pre-K programs.</li> <li>• Invest in early literacy programs (0-5 years) that provide access to books in the home and family resources that support early language development.</li> <li>• Related programs and activities your United Way could implement include: <ul style="list-style-type: none"> <li>• State and local early childhood coalitions</li> <li>• United Way Born Learning Trails</li> <li>• United Way Born Learning Academies</li> <li>• Dolly Parton's Imagination Library</li> <li>• Raising a Reader</li> </ul> </li> </ul>	

# ADDITIONAL APPROACHES EXAMPLE: YOUTH SUCCESS, ECONOMIC MOBILITY, AND ACCESS TO HEALTH

The examples below are from [United Way's Equity Strategy Guides in Childhood and Youth Success, Economic Mobility, and Health](#). They draw from the other impact areas of Youth Success, Economic Mobility, and Health. These approaches leverage the six equity levers in the Equity Framework (data, community engagement, awareness building, policy/advocacy, local capacity building, and resource allocation). Use the guides as a resource to select approaches that build on your existing work and advance equity.

STRATEGIES	APPROACHES	EQUITY LEVER
Types of interventions that could be employed to make progress towards the goal and impact the cause.	Specific initiatives, programs, activities aligned to the stated strategies.	
	Often packaged as individual programs (or products) for donor investment.	



## EXAMPLE: CHILDHOOD AND YOUTH SUCCESS

STRATEGIES	APPROACHES	EQUITY LEVER
Engage families, youth, schools, and community partners to ensure that BIPOC students have access to K-12 high-quality, high-performing schools.	Facilitate the creation of peer networks for families to engage and support one another.	Community Mobilization and Engagement
	Support out-of-school programs (i.e., afterschool, summer) and other youth serving coalitions to implement systemic approaches that improve quality, access, and sustainability of these programs for students of color.	Community Mobilization and Engagement



## EXAMPLE: ECONOMIC MOBILITY

STRATEGIES	APPROACHES	EQUITY LEVER
BIPOC individuals have equitable opportunities to use quality and comparable financial products and services.	Engage donors and establish loan funds to increase accessibility and affordability of timely consumer and small business loans.	Fundraising, Resource Allocation, and Grantmaking
	Advocate for financial institutions to actively review their policies and practices to identify and eliminate patterns of disparate treatment and discrimination on the basis of race.	Policy and Advocacy





## EXAMPLE – ACCESS TO HEALTH

STRATEGIES	APPROACHES	EQUITY LEVER
Work with community partners and residents to strengthen and build healthy, supportive, resilient communities in areas with poor health outcomes by addressing the social determinants of health.	Engage community partners in developing communication strategies that emphasize the role all citizens play in promoting and improving the community's health.	Communications and Awareness Building
	Collaborate with community leaders and members to identify and map key health indicators (i.e., poverty, infant mortality, and life expectancy) to gain an understanding of community inequities.	Data





## TAKE IT A STEP FURTHER: STRATEGY

- [Equity Strategy Guides in Childhood and Youth Success, Economic Mobility, and Health](#). Explore ready-to-deploy strategies to address inequities and close educational, economic, and health gaps rooted in historically institutionalized racism. Explore guidance and questions to ask related to establishing target outcomes, researching strategies, and defining the role of your United Way and its partners.
- [Strategy Guide Overview](#)\* Dive deeper into strategy development: Explore guidance and questions to ask related to establishing target outcomes, researching strategies, and defining the role of your United Way and its partners.
- Assess the effectiveness of your strategy by filling out the [“Is This a Good Community Impact Strategy?”](#)\* worksheet.
- See how you can visually map your strategies and approaches for your impact work by using a Strategy Map; this sample map illustrates possible strategies to improve school readiness as part of a broader effort to improve overall educational outcomes. Similarly, view [United Way of Greenville County’s Middle Grades Strategy Map](#)\* developed as part of United Way Worldwide’s previous Middle Grades Success Challenge.









**TRACK PROGRESS**

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## STEP 8: DEVELOP AND TRACK EQUITABLE OUTCOMES

Outcomes are a specific change in a defined population that demonstrates progress towards your goal. This can include changes in condition, behavior, attitudes, skills, and knowledge. Advancing equity requires collecting data on outcomes for a defined population (e.g., race, gender, ability status, income level, postal code, and neighborhood) to determine the extent to which the strategies and approaches in your impact agenda are having the intended result for specific groups.

Using disaggregated data and lived experiences to first understand existing gaps and disparities, as discussed in earlier sections of this Playbook, will also serve you in the process of selecting specific outcome indicators to collect data on to see the extent to which your work is addressing inequities.

### Identify Outcomes, Not Goals

Target outcomes are not broad goals; they are *specific results* related to goal statements that your United Way and partners will hold yourself accountable to the community. They create a shared commitment among coalition members, focus your planning work, and can help you assess over time the effectiveness of your strategies and approaches.

For example, your United Way might set an equity goal to “close the wealth gap for BIPOC residents in our community” as *measured by* increase in:

- BIPOC access to equitable mortgage rates
- Home ownership rates for residents of color

The latter are indicators by which you will measure progress towards the goal.





## Distinguish Between Population and Program-Level Outcomes

Understand the scale at which you operate to derive a realistic, limited set of outcomes. In general, *population-level outcomes* are measurable changes for a defined population whose scope is beyond the ability of any one organization to solely address and impact. Achieving this level of change involves multiple stakeholders and actions.

*Program level outcomes* are measurable changes for individuals in a particular program, or who receive a specific intervention, service, or support. These changes are often more discrete, timebound, and can potentially be realized within the confines of a specific program.

Your impact agenda may have a combination of broad and more discrete strategies and approaches to achieve stated goals so the set of indicators you select to track progress should also include a mix of population and program-level outcomes.

## Differentiate Outputs From Outcomes

As you identify indicators, be mindful and avoid conflating outcomes and outputs. An output is a measure of effort, which should be used to capture the activities that your United Way and community partners are engaged in to make progress on stated outcomes. This includes indicators like services delivered, number of partners engaged, resources invested, and processes changed. Outputs are almost always measured in numbers (e.g., number of new partners engaged). Capturing effort measures is important to quantify and communicate the investments being made to address issues and create change.

Differentiating between the scale of the impact that you hope to achieve and distinguishing between measures of effort and outcomes are important steps to correctly measure impact, identify opportunities to scale efforts, and pinpoint opportunities for investment.



## Additional Tips

- **Start small**, with a limited set of critical outputs and outcomes, especially if capacity is limited (at your United Way and/or partners, and programs) for data collection, aggregation, and reporting. You can add additional indicators as your initiative matures and expands.
- **Include indicators that capture changes in access, quality, and participation.** Equitable outcome starts with equitable access. Including these types of indicators can help your United Way and community partners understand the connection between differences in opportunities and related outcomes and strengthen your United Way's case to investors for equitable investments.
- **Track outcomes for an entire group—the universal approach—as well as for specific populations—targeted approach—in your data collection.** Disaggregating outcomes data is essential to ensure that strategies and approaches are having the intended impact across all groups. The lessons learned can inform creating new and/or refining existing approaches based on which populations have made progress and for whom rethinking an approach or strategy might improve outcomes.

Example:

- A United Way realizes through data analysis, that providing books in the home has not significantly increased time spent reading to children.
- They disaggregate this data and discover that time spent reading has not increased for Hispanic and African American children but has for other groups.
- They dig deeper and find out from families that books are not offered in Spanish and do not feature diverse characters, so families are not leveraging these resources because they are not culturally relevant.
- The United Way adjusts their approach to ensure a wide range of books, featuring diverse characters and in multiple languages, are offered to all families.

Refine outcomes over time, as needed.

## Sample Questions for Developing Your Outcomes

- How many individuals or families are included in the populations we focus on? Is it reasonable to think that we can affect this number of people/families in a meaningful way?
- What have we learned about barriers to access and opportunity based on demographics (e.g., race/ethnicity, age, ability status, income level, geographic location) and lived experiences?
- What results do we hope to achieve for the population?
- What currently works for a population, and can the approach be scaled?
- How much of an impact on the identified issue will we have by achieving results for the specific population(s)?
- How are we determining if the results are meaningful for and acceptable to the population experiencing disparity?
- How have we ensured that all coalition partners share the same expectations regarding target outcomes?
- What is the timeframe by which we hope to achieve stated outcomes? Is this realistic given the magnitude and scope of the issue?

Incorporating the results to close school readiness gaps into an equity-focused impact agenda, brings all the elements together below.



FOCUS ISSUE	GOAL	STRATEGIES	APPROACHES	RESULTS
Children aren't prepared for kindergarten and there are school readiness gaps.	<ul style="list-style-type: none"> <li>• 100% of children test proficient on school readiness assessments by the end of kindergarten.</li> <li>• Close readiness gaps for BIPOC children by 30% over the next three years.</li> </ul>	Increase access to high-quality early childhood programs, especially for BIPOC children.	<ul style="list-style-type: none"> <li>• Map availability and quality of early childhood programs in communities of color and target investments to address gaps in quality and access.</li> <li>• Advocate for increased state subsidies for families that increase the affordability of childcare, early childhood, and Pre-K programs serving 0-5 years old.</li> <li>• Invest in training and professional development for early childhood educators across diverse settings (e.g., family/friend/neighbor care, childcare, Pre-K); including training on implicit bias and cultural competency training.</li> <li>• Engage families of young children (0-5 years), especially in low-income neighborhoods, to understand how ongoing barriers limit access to quality childcare, early childhood, and Pre-K programs.</li> <li>• Invest in early literacy programs (0-5 years) that provide access to books in the home and family resources that support early language development.</li> <li>• Related programs and activities your United Way could implement include: <ul style="list-style-type: none"> <li>o State and local early childhood coalitions</li> <li>o United Way Born Learning Trails</li> <li>o United Way Born Learning Academies</li> <li>o Dolly Parton's Imagination Library</li> <li>o Raising a Reader</li> </ul> </li> </ul>	<p>Outputs:</p> <ul style="list-style-type: none"> <li>• Number of children participating in developmental screenings</li> <li>• Number increase of children (especially BIPOC) enrolled in early childhood programs</li> <li>• Number and percent of families who receive information or resources to support their child's early childhood development</li> </ul> <p>Outcomes:</p> <ul style="list-style-type: none"> <li>• Percent of children who achieve key developmental outcomes</li> <li>• Percent of children who are prepared for kindergarten (i.e., proficient on school readiness assessments)</li> <li>• Percentage increase in high-quality, affordable childcare and Pre-K programs</li> <li>• Percentage increase in family/children's access to early literacy experiences and supports (e.g., Born Learning Trails, books)</li> </ul>



## TAKE IT A STEP FURTHER: OUTCOMES

Additional resources to help monitor outcomes include:

- [United Way Equity Framework – Program Outcomes and Community Outcomes. What are the Differences?\\*](#)
- [United Way Equity Framework – Data Lever](#)
- [United Way Global Results Framework\\*](#)
- [United Way Global Results Framework Data Reporting Guide\\*](#)
- [Making the Case for Demographic Data Collection. D5 Coalition.](#)
- [So You Want to Collect Demographic Data: Getting Started. D5 Coalition.](#)





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# STEP 9: SHARE RESULTS

The previous step focused on developing your approach to measuring outcomes to demonstrate progress and to gather insights for refinement and continuous improvement. In this step, we focus on how you can effectively communicate your results through an equity lens.

## Think Strategically About Messaging

Communicating broad, community-level changes, rather than just highlighting individual stories, can be difficult and require challenging preconceived notions and instincts related to storytelling. Conveying the meaning and importance of equity is also challenging. The [Frameworks Institute](#), a nonprofit research organization that helps mission-driven organizations build public will for progressive change, outlines methods that can help overcome these challenges and position your results to make a stronger impact.<sup>2</sup>

Strategic messaging is crucial to effectively communicate results and how they're received by your stakeholders. Sharing progress for some, and opportunity for others based on lessons learned, is also a valuable part of conveying a holistic narrative. Taking this step reflects equity as a process and elevates issue awareness. These outcomes could also create opportunities to elevate root cause issues that impact the effectiveness of interventions.

## Put Individual Narratives in a Larger Context

Individual-level explanations often seek to make emotional connections and help to personalize issues that might otherwise be considered too complex to process. However, they can also inadvertently perpetuate stereotypes and shift the focus away from system-level shortcomings to individual deficits and thereby create unintended harmful impacts.

When sharing stories, be sure to check the frame you are using to describe underlying conditions:

- Discuss system and root cause issues as the source of disparities rather than common episodic storytelling methods that highlight **individuals and events with the aim to fix one person**
- Use asset-based framing to communicate challenges rather than deficit-based framing

### Example: Assets vs. Deficit-Based Framing

FOCUS ON SYSTEMS AND/OR ASSET-BASED FRAME	FOCUS ON INDIVIDUALS AND/OR DEFICIT-BASED FRAME
Everyone should have access to safe and affordable housing in our community. Years of discriminatory lending practices have limited home ownership opportunities for BIPOC individuals, creating a disproportionate number of renters. Rentals are usually a primary source of income for landlords.	Tenants don't pay rent and landlords are greedy.
Schools need more resources to meet the needs of teachers, students, and families.	This is a failing school; teachers are ineffective, students are unmotivated, and parents are unengaged.
Low-income BIPOC communities are often under-resourced, over-policed, and more likely to be surveilled.	BIPOC communities are crime-ridden and dangerous places.



Additional U.S. cultural norms/beliefs that can pose barriers to making the case for equity and/or broader changes include:

- **Self-makingness, or individualism.** Belief that inequities are due to personal failings and lack of discipline or hard work.
- **Fatalism.** Belief that inequities are simply a part of life and racial disparities are particularly intractable.
- **Us vs. Them, or separate fates.** Belief that different racial groups exist in zero sum competition.
- **Historical progress.** Perception that the nation has progressed far, and racism and discrimination are attitudes found in a few people, not systems.
- **Consumerism.** Understanding social issues in relation to financial choices and affordability that are dependent upon the market.

## Shift the Narrative

Employ thematic storytelling focused on social change that aims to fix systemic conditions and appeals to citizens' goodwill by highlighting issues, trends, and better policies.

Reframe social issues by employing the following narrative structures:

- **Principles.** Demonstrate the stakes at hand, invite the public into the conversation, and move away from crisis messaging by leading with a problem. What principles should we uphold as a society?
- **Process.** Use explanatory tools to connect causes to effects, avoid jargon, and use illustrative examples. How and why aren't we living up to those principles?
- **Purpose.** Demonstrate what change can look like, and how it's possible to counter separate fates thinking. Create a positive and concrete vision. What should we aspire to as a society?
- **Proposal.** Include solutions or calls to action to highlight what plans or solutions can be used to get there. Focus on strong calls to action that are concrete, collective, causal, conceivable, and credible.

## Solicit Feedback

Before sharing progress and results, solicit input and feedback from stakeholders, especially community members and donors. Considering the diversity of United Way stakeholders, taking this step better ensures that the intended message is shared in ways that are informative, actionable, and constructive.

Avoid solely producing written publications. Explore other methods of sharing progress that might include videos, webinars, in-person convenings, or even interactive gallery walks. Share your results related to reach and impact with the broader community and everyone who informed the effort.

## Messaging Checklist

Assess your communications to determine if they:

- Avoid reinforcing harmful assumptions about the issue
- Lead with a value
- Provide sufficient explanation
- Offer a positive alternative to the current circumstances
- Include clear, concrete solutions or calls to action





## Leverage Existing Assets

Your United Way likely has existing foundations and resources to effectively communicate your work and its impact. Your in-house marketing and communications expertise, whether a small or large team, can lay the foundation for your storytelling and bolster your existing reputation as trusted, credible communicators of community information.

Additionally, through your United Way's impact work, you likely already have access to diverse audiences, multiple communications channels, and relationships in your community.

## Strengthen Organizational and Staff Capacity

Assess your existing external and internal communication practices. Marketing and communications professionals on your staff may not necessarily have experience, perspective, or expertise to talk about equity, inequality, or structural racism. As such, you should normalize conversations about structural racism, equity, and other forms of oppression throughout the organization.

It's important to invest in building staff competency through ongoing training and professional development opportunities:

- Offer training to build the capacity of your community partners to advocate for equity and integrate this as internal practice.
- Build partnerships with organizations explicitly focused on equity.
- Create and use consistent messaging that conveys your organization's commitment to equity.
- Regularly use disaggregated data in messaging to help make the case for addressing gaps and disparities.

## Deepen and Accelerate Your Efforts

- Create and publicly share a statement opposing all forms of racial/ethnic discrimination. This is an expectation of all United Ways. Refer to [United Way Worldwide's Implementation Guidance \(U.S.\) for Equity Membership Requirements.\\*](#)
- Identify and use communications channels that specifically reach communities of color—including social and traditional media, informal networks, community-based organizations and institutions, and local leaders—potentially going beyond your traditional media strategy.
- Provide space for residents to create their own narratives and share lived experiences.
- Create accessible materials that also leverage multiple formats (e.g., stories).
- Work with unlikely partners and focus on building awareness of corporate supporters.

## Strategic Framing Example

The language below illustrates how to frame challenges that stress structural challenges over individual behavior as demonstrated in the United Way Worldwide Frameworks Webinar. Rather than leading with, for example, the anecdote that BIPOC or low-income children miss school more often, the communication below highlights broader socioeconomic, cultural, and institutional factors that can pose barriers to school success.

***"We are committed to making sure that all children have the same opportunities, regardless of the color of their skin, how much money their family has, or the language they speak at home. That's why we need to build strong connections between all families, our schools, and our community."***

The statement aims to move public thinking towards understanding how engagement strengthens opportunities for student achievement and development for all children, regardless of background, and points to broader reasons why some children might experience greater barriers to regular school attendance.

When putting these items together, we can identify the cause, why solutions aren't currently happening, and why that's the case.

- **Value:** All children should have access to the services, supports, and opportunities they need to thrive at every stage of life.
- **Cause:** Enduring inequities in society make that difficult, affecting the wellbeing of many children and their families. Schools and other educational environments can help offset this problem, but to eradicate it, we need solutions that address every aspect of a child's life, including their health and family income.
- **Link:** Inequities like stagnant wages and the increasing cost of living make quality housing options unaffordable, often pushing families into unsafe, unstable conditions. Poor housing can lead to poor health outcomes.
- **Link:** When children are exposed to risks like contaminated air or lead paint, they may develop illnesses like asthma. That can lead to increased sick days and school absences.
- **Problem:** Children's educational outcomes like test scores, achievement levels, and graduation rates suffer as a result.
- **Solution:** The Education Redesign Lab partners with mayors, superintendents, and civic and community leaders to build integrated education and child development systems to construct well-being for low-income children. Those systems include access to early childhood education, ongoing health and mental health services, after-school and summer enrichment programs, college and career supports, and social networks that expand access to college, jobs, and upward mobility.

Audiences won't have to determine how school attendance and overall success relates to health or income equality as it's demonstrated here. Links can be unlimited.







## TAKE IT A STEP FURTHER: COMMUNICATIONS

Additional resources to help strengthen your communications include:

- [United Way Brand Messaging Guide – COMING SOON!](#)
- [United Way Equity Framework – Communications and Awareness Building Lever.](#)
- [Here's How Nonprofits Can Get Americans to Fight the Racism Laid Bare by Covid-19.](#) The Chronicle of Philanthropy.

The Frameworks Institute has resource to help convey the importance of equity and compelling stories:

- [Changing the Narrative on Public Education Communications Toolkit](#)
- [Talking About Health Equity](#)
- [Talking About Poverty: Narratives, Counter-Narratives, and Telling Effective Stories](#)
- [Framing 101](#)



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# ADDITIONAL SUPPORT

## Integrating Equity Into an Impact Agenda – United Way Examples

See how two United Ways worked to integrate equity into their impact agendas.

### *United Way of Southwest Michigan (UWSM)*

While developing its 2022-2025 Impact Agenda for Change, UWSM reflected on previous work and knew it required change. The organizational mantra became “I don’t want to go back to normal,’ because enduring a global pandemic, systemic inequity and oppression, and extreme political divisiveness reminded us life before 2020 wasn’t great for a lot of people in Southwest Michigan.”

To make its agenda more equitable, UWSM acknowledged some issues might no longer align with existing partners. Early conversations with these partners helped raise awareness.

Looking forward to a more equitable approach, UWSM set a goal to “decrease the number of students not reading proficiently by the end of third grade and reduce racial and economic disparities.”

### Listen to Stakeholders

To bring in community voices, UWSM conducted simple conversations with foster parents, family, and parents of children under the age of five, senior citizens, law enforcement, and teachers.

Facilitators asked three questions:

- What are the aspirations you have for your community?
- What will it take to get there?
- Who do you trust to do that work?

### Collect and Analyze Data

UWSM subsequently used the following data in its research:

- [Michigan Department of Education](#)
- Census data
- [Great Start Collaboratives](#), early childhood systems building bodies in the state of Michigan

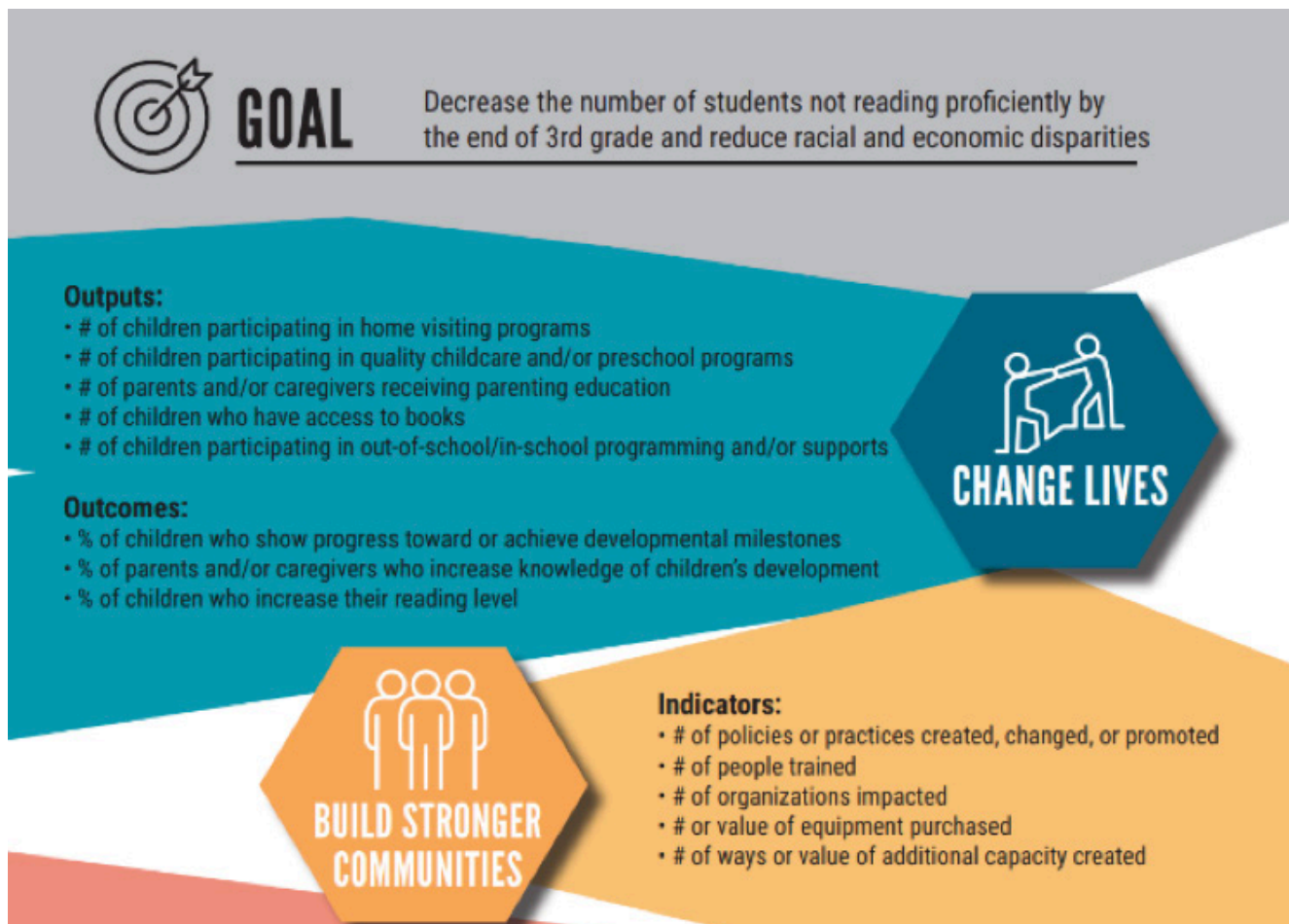
UWSM found inequities in reading levels based on varying racial backgrounds in the community with black and Hispanic third graders who read proficiently at 12.7% and 31.3%, respectively, compared to 52.5% of white students. A significant gap was also identified between economically disadvantaged students (31.1%) and those who are not disadvantaged (64.4%).

## Strategies and Goals

To increase reading proficiency, UWSM identified the following strategies:

- Home visiting programs
- Quality childcare and/or pre-school
- Parenting education
- Access to books
- Out of school/in school programming/supports

UWSM developed the measurement framework below to track progress.





Through this experience, the organization began to value the concept of “Don’t do it to me without me.” Moving forward, UWSM will engage those most impacted before making changes or starting new programming.

## ***United Way of the Piedmont***

The organization gradually focused on equity in shaping its [2022-2023 Community Impact Agenda](#). Conversations around issues related to race and equity emerged in the organization in recent years, notably through its community indicators group and other collaboratives an annual hosting of a racial equity institute beginning in 2019, however the United Way became more intentional about equity in 2020.

The United Way identified five interconnected categories that contribute to families in its community becoming self-sufficient as focus areas for the bold goals of its image agenda: economic mobility, health, safe environment, education, and basic needs.

For its economic mobility goal, the organization aims to decrease the number of individuals living below self-sufficiency by 11,000 (10%).

## **Listen to Stakeholders**

When sharing its racial equity index with community members, some, specifically BIPOC community members, felt it didn’t reflect their experiences. It was important to recognize that lived experience can be incorporated in data, but not captured completely.

Many participants referenced issues related to crime and safety as a top concern, which did not surface when speaking with nonprofit or corporate partners or donors. These community voices added insight that would’ve been otherwise lost if not consulted.

Additionally, the United Way of the Piedmont replaced its Community Investment Committees—previously composed of donors who volunteered to review applications—with a newly constituted [Vision Council](#).

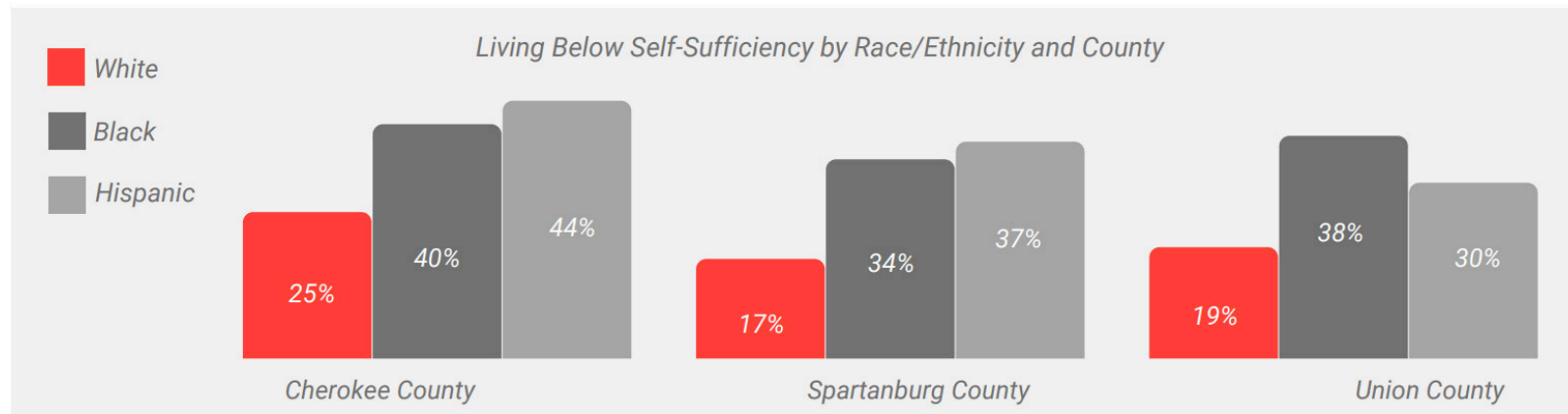
Vision Council members are community members who have expertise and experience related to priority areas and help make the investment process more equitable as a result. Those reviewing applications come from more diverse backgrounds and have a deeper understanding of challenges and what it takes to address them.

## **Gathering and Analyzing Data**

Data sources accessed for research included:

- Census data
- 2-1-1 call traffic summaries
- Cherokee County Racial Equity Index commissioned by Community Ressearch Group
- [Spartanburg Academic Movement](#), a committee of educators, leaders, and communities across the county
- Strategic Spartanburg, a collaboration between cities, counties, and foundations to drive outcomes in specific indication areas
- [Live Healthy Spartanburg](#), an organization dedicated to achieving health equity and improving health outcomes

Data uncovered a key statistic: 29% of individuals across Spartanburg, Cherokee, and Union Counties live below self-sufficiency. United Way of the Piedmont also examined disaggregated data in the three counties it serves, which showed undeniable disparities between racial groups.








## Strategies and Goals

To decrease the number of individuals living below self-sufficiency, United Way of Piedmont developed the following intended results to align to its planned approaches.

### IMPACT GOAL

Reach our overall Bold Goal to decrease the number of individuals living below self-sufficiency by 11,000.

### INTENDED RESULTS

-  Provide clear education paths for adults without their high school diplomas and support them on their journey as well as develop career strategies with the individuals' goals given priority.
-  Improve technical and soft job skills among unemployed/underemployed and work in partnership to then make connections to employment.
-  Reduce environmental and systemic barriers to employment including access to transportation and quality, affordable childcare.
-  Provide supportive programs that encourage savings and asset development within low-moderate income households.
-  Develop collaborative strategies to increase affordable, safe housing stock and provide supportive services to access housing for low-income households.



A results-based accountability framework measured success under three categories.

## HOW SUCCESS WILL BE MEASURED

### HOW MUCH WE DID

- Participants served by the program
- Participant contact hours
- Participants enrolled in adult education classes
- Participants seeking affordable housing opportunities

### HOW WELL WE DID IT

- Participants that completed an assessment for assistance
- Participants engaged in identifying personal goals and are taking steps toward achieving those goals
- Participants who successfully complete career readiness survey/evaluation
- Participants who engage in internships, apprenticeships, or job training
- Participants who complete adult education classes
- Participants connected to employment
- Participants who gain access to affordable housing
- Participants who open/maintain a checking and/or savings account

### IF ANYONE IS BETTER OFF

- Participants who successfully complete their personal and program goals
- Participants who successfully maintain affordable housing
- Participants who gain employment
- Participants who increase wages
- Participants who maintain employment at 6-month or 12-month check
- Families whose self-sufficiency has improved
- Participants who achieve financial stability

## Communicating Results

United Way of the Piedmont had systems and processes to communicate results to nonprofit partners, community leaders, donors, and stakeholders, but lacked ones for community members it serves.

The organization often received feedback from focus groups that community members were asked for input but didn't feel change resulted from their engagement, they were not provided information on next steps, or how information they provided was used.

To boost its client communication stream, a monthly newsletter started in 2020 for individuals serviced in the last 12 months to stay informed on resources, events, and services that might be able to help them.



## ADDITIONAL RESOURCES

Explore additional resources that can help support your efforts to integrate equity into your community impact agenda.

### Organizational Support

- [Policy Link: Equity Is the Soul of Collective Impact](#). View lessons learned from equity-focused community action.

### Case Studies

- [Center for American Progress: Advancing Equity](#). Review the Biden administration's key efforts and accomplishments to advance equity in its first year.
- [Stanford Social Innovation Review: Community Takes the Wheel](#). See how a new framework provided the Children and Youth Cabinet a road map to put equity at the center of its work.

### Tips and Strategies

- [Candid: Impact Measurement](#). Learn how to measure your nonprofit's impact.
- [Deloitte: Activating Health Equity](#). Explore business solutions to address disparities in health outcomes.
- [FSG Collective Impact](#). Learn to apply an equity mirror to collective impact.
- [Center for the Study of Social Policy: Ideas in Action](#). Position equity at the center of implementation.

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## SOURCES

1 This assessment was developed by the Race Matters Institute/Just Partners, building on the Annie E. Casey Foundation's "Advancing the Mission Toolkit." Race Matters Institute, accessed May 6, 2019, <http://racemattersinstitute.org/>.

2 Content in this section is adapted from The Framework Institute's presentation on a webinar convened by United Way Worldwide on January 13, 2021.





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