

Equity Institute

Achieving Impact at Scale in the Equity Movement

Columbus KL, 120 seats

1:00pm–4:00pm





Achieving Impact (Before Scale) in the Equity Movement

PolicyLink Equity Summit

March 11, 2018

Achieving impact (before scale) in the equity movement

- **Why equity is the work... everywhere**
- **Achieving impact: A few lessons to date**
 - Good data is important
 - We must target root causes
 - We deserve good things
 - Go big!



**Introductions:
The personal
(professional)
is political**



About Public Equity Group

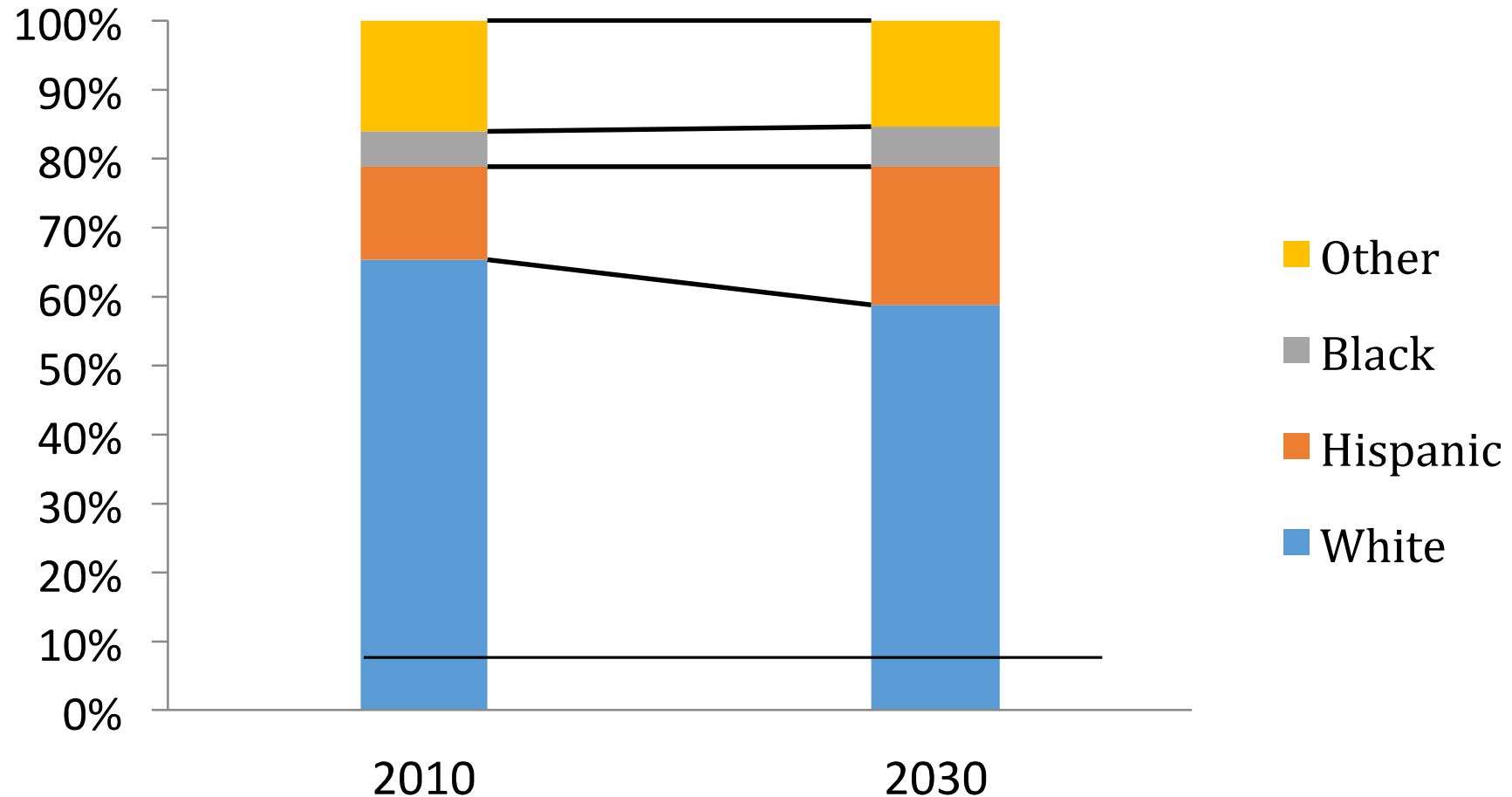


Public Equity Group is a diverse “network” of strategy and management consultants mobilized to help visionary leaders and organizations achieve impact

- Boutique consulting firm focused on strategy development and management practices for philanthropic and community-based organizations nationally
- We work with partners poised to make a demonstrable difference on the “big issues of the day,” and in the lives of disadvantaged populations. In particular, we look for clients with the following qualities:
 - Deep **social change** commitment and compatible organization values
 - High potential for national or global **impact**, scale, and/or replication
 - Strong **leadership** (strategic thinking, management, implementation)
 - **High organization capacity** to implement (staff and board quality; planning, monitoring, operations, and systems quality)
- Recent clients include PolicyLink, the San Francisco Foundation, the Greater Milwaukee Foundation, Espacios Abiertos (PR)/Open Society Foundations, Forever and Always Melanin, and the Buffett Early Childhood Fund (among others)

Why “Equity is the work” – everywhere in the US

NEBRASKA YOUTH (0-18) POPULATION DISTRIBUTION, 2010-2030^[1]



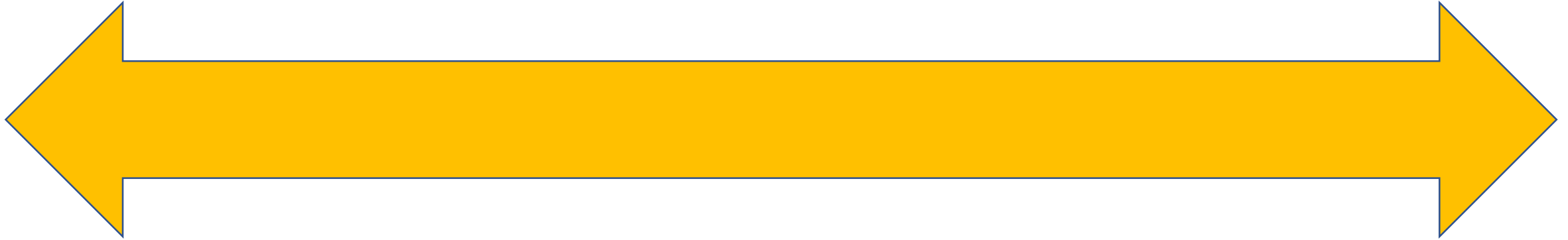
^[1] University of Nebraska Center for Public Affairs Research projections

Equity work is non-negotiable

Poverty rates by region, race and ethnicity (2008-2012)^[1]

	United States	Nebraska	City of Omaha
Poverty rate (e.g., below FPL of ~\$23K for a family of 4)	15%	12%	16%
White	10%	9%	11%
Asian	12%	16%	23%
Hispanic	24%	25%	28%
Black	27%	33%	34%
Native American	28%	38%	45%

A continuum of Equity work?



“We must do better by participants/clients/grantees of color”

“Addressing inequity is a top priority”

“Equity is our work”

Continuum of Equity work (cont.)



- Vision & mission
- Goals/Intended impacts
- Theory of change
- Programs
- Organization
- Economics
- Metrics
- Governance

“We must do better by participants/clients/grantees of color”

“Addressing inequity is a top priority”

“Equity is our work”

***Where is your organization & why? How successful?
(What to stabilize → deepen → grow)***

Where should you be (& why)? What would it take to “get there”?

Achieving impact (before scale) in the equity movement

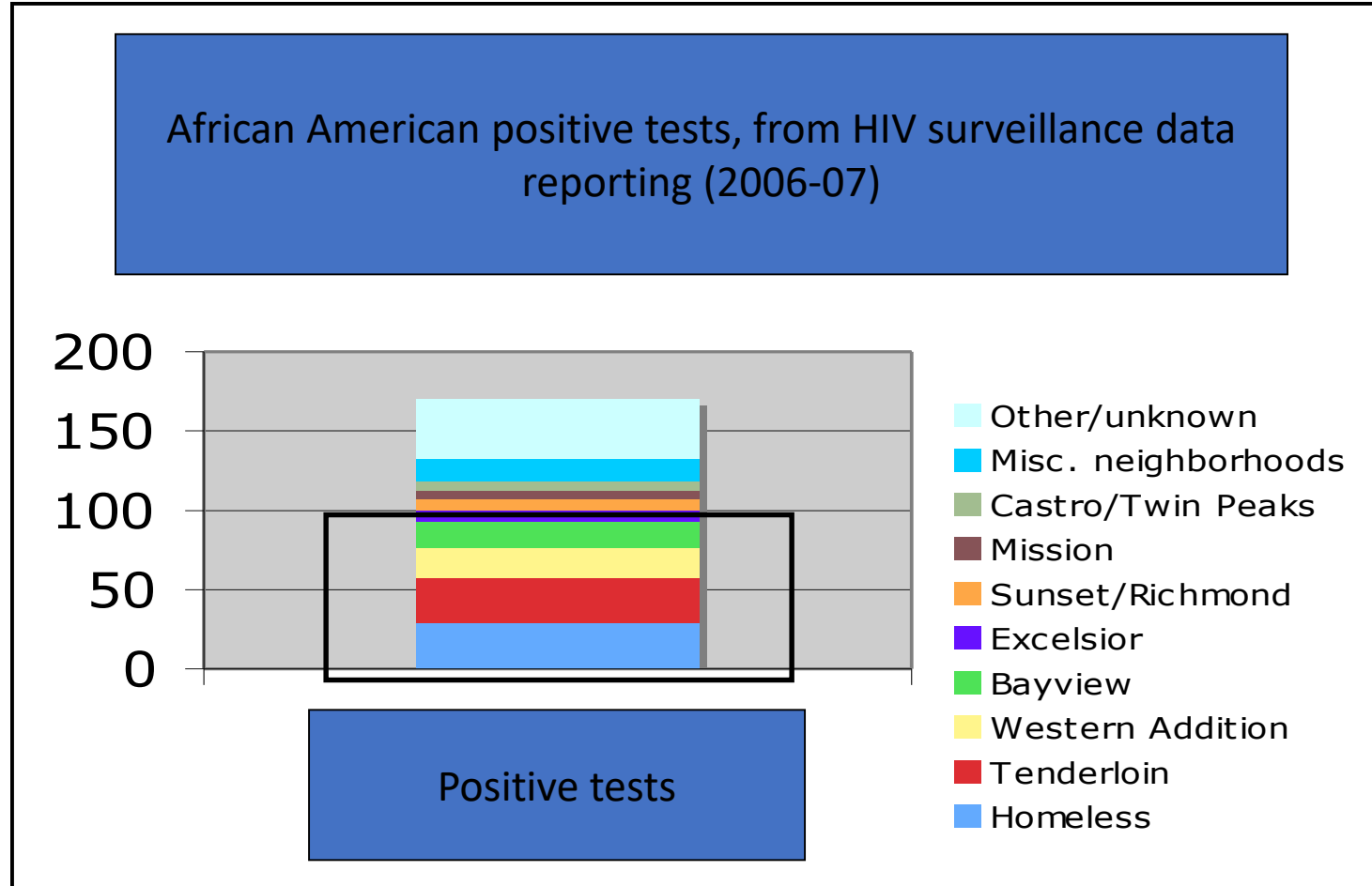
- **Why equity is the work... everywhere**

- **Achieving impact: A few lessons to date**

- Good data is important
- We must target root causes
- We deserve good things
- Go big!

Good (disaggregated) data is important

Illustrative



Source: SF HIV/AIDS Prevention Section data

*“One patient was really sick and came to the clinic with his mother, aunt, and grandma, wonderful, beautiful Black women. We had a gay, White social worker here at that time and we were discussing this family in a meeting and the social worker said, ‘**they’re just a bunch of fag hags.**’ I was totally offended. There was a total lack of understanding of the Black family and community. I walked out of the meeting with tears in my eyes”*

*“One guy needed help with getting back to and from the hospital and needed taxi vouchers. He was too sick to get back on the bus, so I gave him a taxi voucher,” recounts a service provider. “He went to a White social worker, and the social worker said, ‘**I’ll give you a taxi voucher, but you need to realize that the vouchers are a privilege not a right.**’ Pretty strong words from a White person to a Black person”*

Data collection: Some best practices are attainable

Illustrative

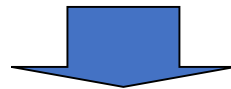
	From	To
Parent & teacher feedback	<ul style="list-style-type: none">• <i>Are you satisfied with the program?</i><ul style="list-style-type: none">- 98% YES	<ul style="list-style-type: none">• <i>What gains are you seeing?</i><ul style="list-style-type: none">- Parents: Student interest in school- Teachers: Parent engagement
Student feedback	<ul style="list-style-type: none">• Home grown survey	<ul style="list-style-type: none">• Validated (and customized) survey by Harvard Ed School spinoff: \$5K-10K
Program quality; student learning, performance	<ul style="list-style-type: none">• Expensive, convoluted RCT	<ul style="list-style-type: none">• Expert observers from leading universities: \$10K• <i>Custom standardized exams? (w/ nat'l standardized test company)</i>

We must target root causes

Illustrative

What is causing high rates of HIV prevalence among African Americans – particularly Black MSM nationally?

- “Because of a **complex set of historical, structural, environmental, and cultural factors -- including racism and discrimination, poverty, denial, stigma, homophobia, and limited access to health care --** African Americans are more vulnerable to HIV infection” (CDC)
- “While much of the existing literature focuses on quality of care, health care access or individual risk behaviors, we believe that **the HIV/AIDS epidemic in African-American communities results from a complex set of social, individual, and environmental factors**” (NMAC)



The causes of the Black (MSM) HIV epidemic extend beyond individual risk factors and individual behavior, to larger issues facing Black (MSM) individuals and communities

Certain factors appear to contribute substantially to high HIV prevalence among Black MSM in SF

- **Membership in high HIV prevalence sexual networks & neighborhoods (e.g., the Tenderloin)**
- **Isolation & other psycho-social challenges (e.g., mental health, substance abuse)**
- **Group-level stigma (especially racism within the City's LGBT community; also, HIV-stigma & homophobia in the Black community & elsewhere)**
- **Macro-environmental factors:** Health care access (including HIV tests), ART & other services; housing instability -- especially SROs; & poverty (e.g., under-employment, education)

We must target root causes (3)

Illustrative

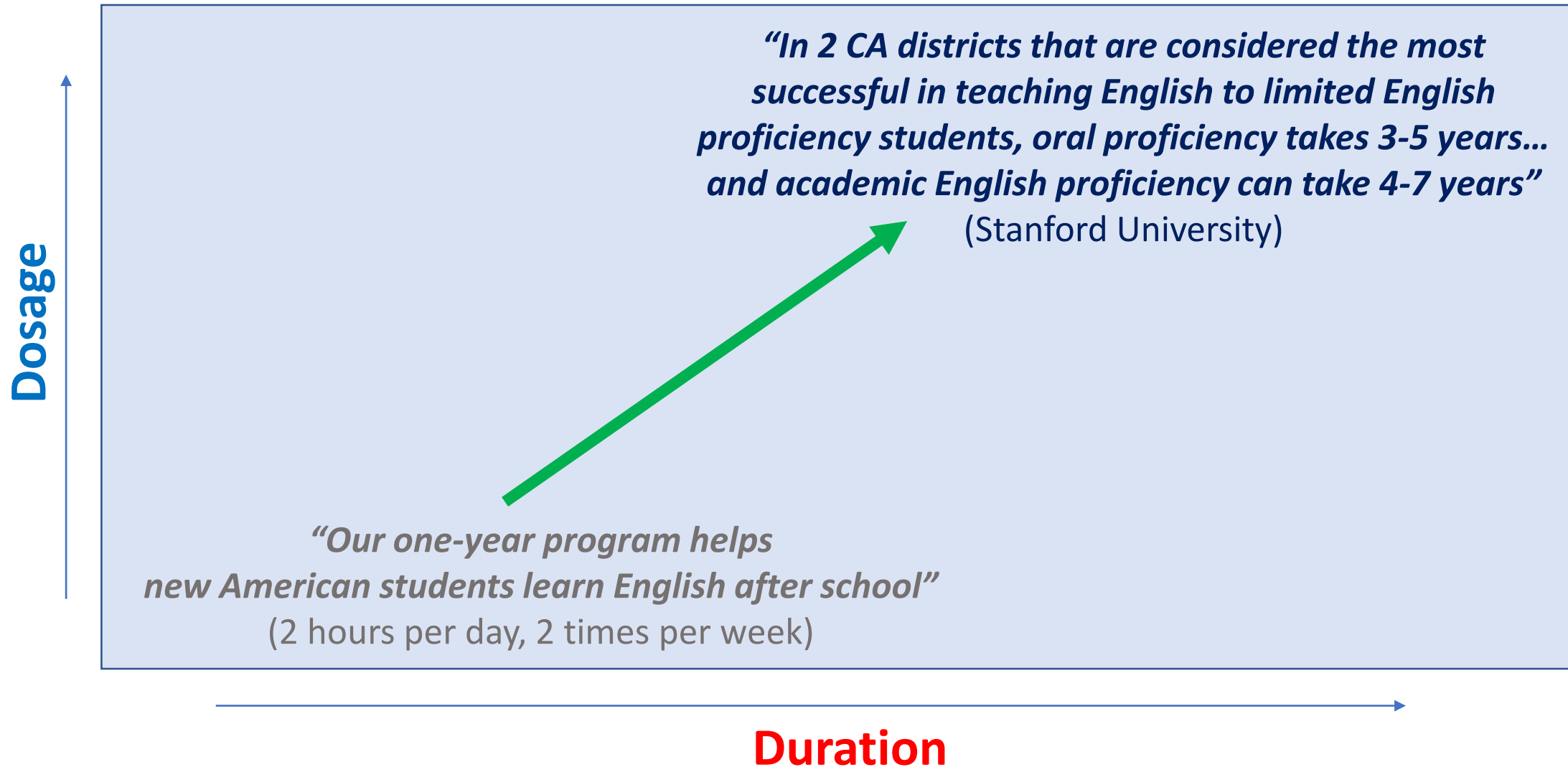
Recommendations:

- **Focus HIV education, testing & care services in high prevalence networks & neighborhoods. Also explore the creation of a Black MSM “Center” in the Tenderloin & expand existing, culturally competent support services**
- **Support the launch & expansion of social outlets for Black MSM. Increase Black MSM access to group support & counseling, and to relevant substance abuse support**
- **Create anti-stigma initiatives focused in the LGBT community, and in the Black community, respectively, & help build provider cultural competency. Monitor (end) racial profiling of Black men in the Tenderloin, Castro & elsewhere; & develop programs that strengthen coping skills**
- **Increase availability of quality, low & moderate income housing for HIV+ Black MSM & others; & support community improvement efforts. Support new mechanisms for development of a Black MSM advocacy agenda**

A dark, dimly lit scene of a sofa with a newspaper and a cardboard box. The sofa is covered with a greyish-blue fabric. A newspaper is lying on the sofa, and a cardboard box is visible in the foreground. The overall atmosphere is somber and quiet.

We deserve good things

Go big!*



*High quality programs, assessment, research, policy, partnerships, funding, at scale...



Thank you!



REIMAGINING SOCIAL CHANGE

Equity in the Context of Collective Impact

POLICYLINK EQUITY SUMMIT | APRIL 11, 2018

BOSTON

GENEVA

MUMBAI

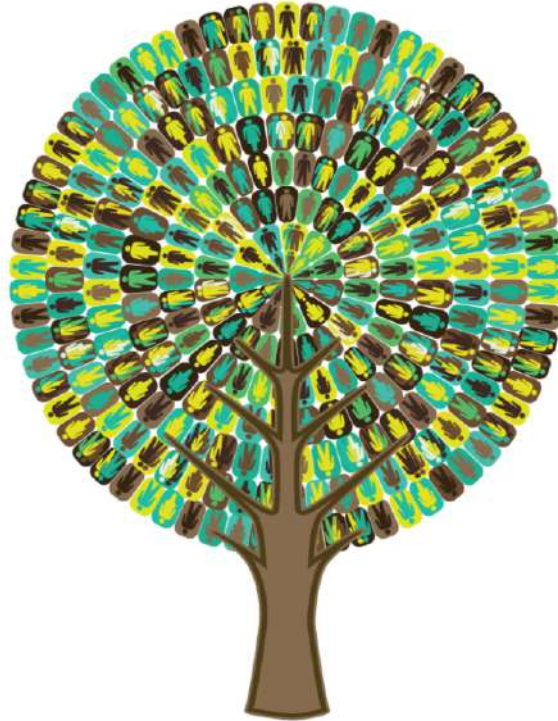
SAN FRANCISCO

SEATTLE

WASHINGTON, DC

[FSG.ORG](https://www.fsg.org)

Doing collective impact well means being vigilant about equity and inclusion



How to bring an Equity Lens to Collective Impact

Key Condition of Collective Impact

1

Common agenda

- Asking how different parts of the community are affected by an issue and **ensuring that the voices of those most affected are included in setting the agenda for change**

2

Shared measurement system

- Thinking about **how shared data will be disaggregated to reveal disparities** by neighborhood, race/ethnicity, income level, gender, and other important characteristics

3

Mutually reinforcing activities

- Tailoring activities to benefit the broader population while also **focusing on a particular subset of the population who face significantly large barriers**

4

Continuous communication

- Ensuring that **communication is accessible** (in vehicle, language, etc.) and that those with lived experience are **active participants in co-creating the work together**

5

Backbone support

- **Building credibility** with the communities most affected by inequities, and developing skills for the backbone to address disparities and authentically engage others

How to Bring an Equity Lens to Collective Impact

Eight principles of practice are the “how” of collective impact

Collective Impact Principles of Practice



Design and implement the initiative with a priority placed on **equity**.

Include **community members** in the collaborative.

Recruit and co-create with **cross-sector** partners.

Use **data** to continuously **learn, adapt, and improve**.

Cultivate leaders with unique **system leadership** skills.

Focus on program and **system strategies**.

Build a culture that fosters **relationships, trust, and respect** across participants.

Customize for **local context**.

Being intentional about building equity into the front makes a difference

*“Earlier this week I attended a steering committee meeting with 30 organizations to discuss and map a collective early education plan for Staten Island. **The issue of race and racial inequities was included in the conversation, a first for Staten Island.** It was honest, emotional and intense.*

As we each told our story, we recognized we are more alike than we are different and want the same things, an exemplary education for our children. At the core of every sentence was a REAL commitment to move ALL children to not just meeting minimum state standards but exceeding them.

For the first time since my children began their academic career, I see glimpses of a beautiful future for marginalized students of color on Staten Island where leaders who were formerly foes are now working diligently behind the scenes in unison.”

-Collective Impact Steering Committee Member

An independent fieldwide study was commissioned to help answer a fundamental question

To what extent and under what conditions does the collective impact approach contribute to population level outcomes?



A New In Depth Research Study of 25 Communities Achieving Collective Impact in areas such as:

- Homelessness
- Education
- Workforce Development
- Prescription Drug Abuse
- Food Sustainability
- Watershed Restoration
- Poverty Reduction
- Child Obesity Prevention

<https://www.fsg.org/blog/new-research-study-when-collective-impact-has-impact>

Definition of equity in this study

*Equity is fairness achieved through **systematically** assessing **disparities in opportunities and outcomes** caused by structures and systems and by addressing these disparities through **meaningful inclusion** and representation of affected communities and individuals, targeted actions, and **changes in institutional structures and systems** to remove barriers and increase pathways to success.*

The study analyzed CI sites' capacity to engage in equity actions

The analytic rubric assessed five key areas:



Capacity to engage in equity action

- Explicitness of intent or focus, capacity-building activities, shared language, and credibility of the initiative backbone and leadership with the community



Equity-focused actions

- Using locally relevant and disaggregated data to understand disparities, targeting actions to greatest need, building on community strengths and assets for solutions, and engaging in deep structural analysis of inequity root causes



Representation and meaningful inclusion

- Including those with lived experience in leadership, governance, and initiative work, shifting of power to those affected most by the problem being addressed, and successfully engaging those who typically do not participate



Equity systems changes

- Changes that remove structural barriers, increasing access, and creating new pathways through practices and policies designed to remove systemic factors causing inequality

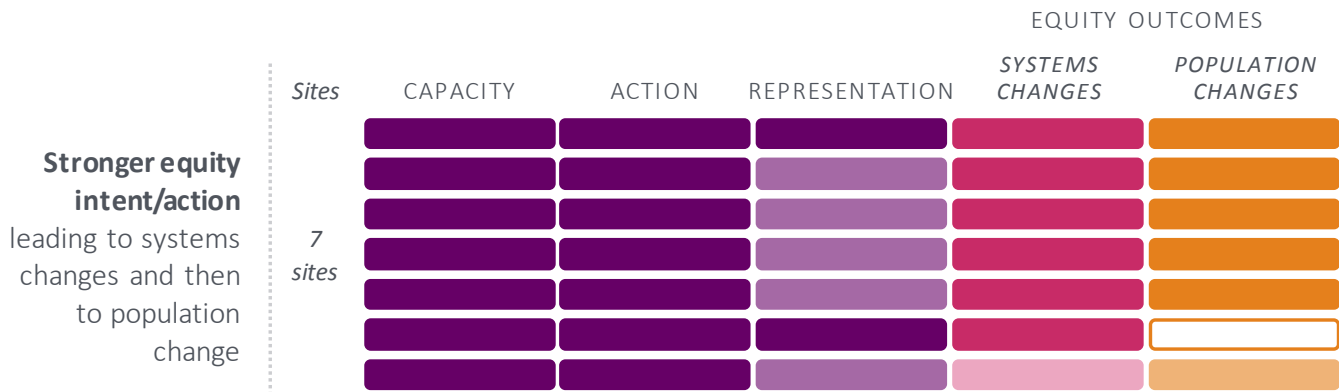


Equity population changes

- Closing gaps in outcomes for all groups

Sites that intentionally incorporated equity achieved progress on equity outcomes

Initiatives with strong and emerging equity focus showed promise in their equity outcomes; those with no focus typically did not see results that advanced equity, with a few exceptions.

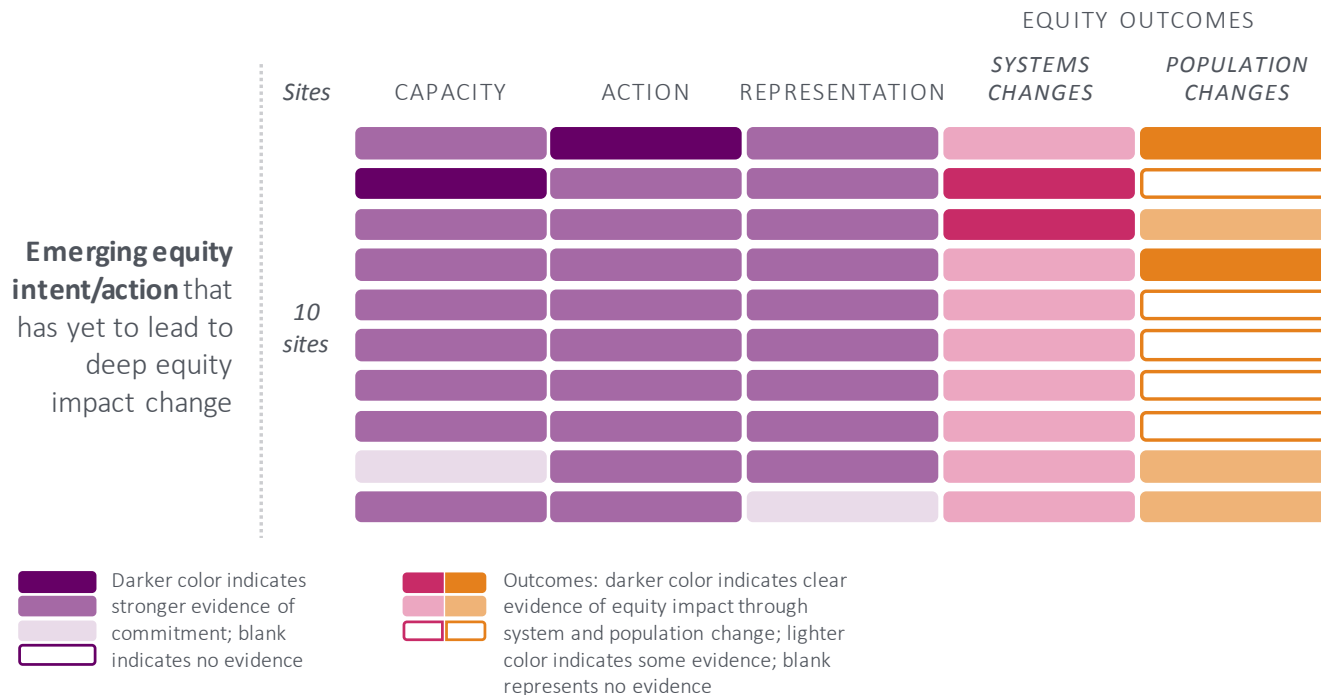


Darker color indicates stronger evidence of commitment; blank indicates no evidence

Outcomes: darker color indicates clear evidence of equity impact through system and population change; lighter color indicates some evidence; blank represents no evidence

Several sites demonstrated a blend of strong and emerging equity elements, to mixed results

Initiatives with strong and emerging equity focus showed promise in their equity outcomes; those with no focus typically did not see results that advanced equity, with a few exceptions.



Implications for the field going forward

Key questions emerged for CI initiatives :

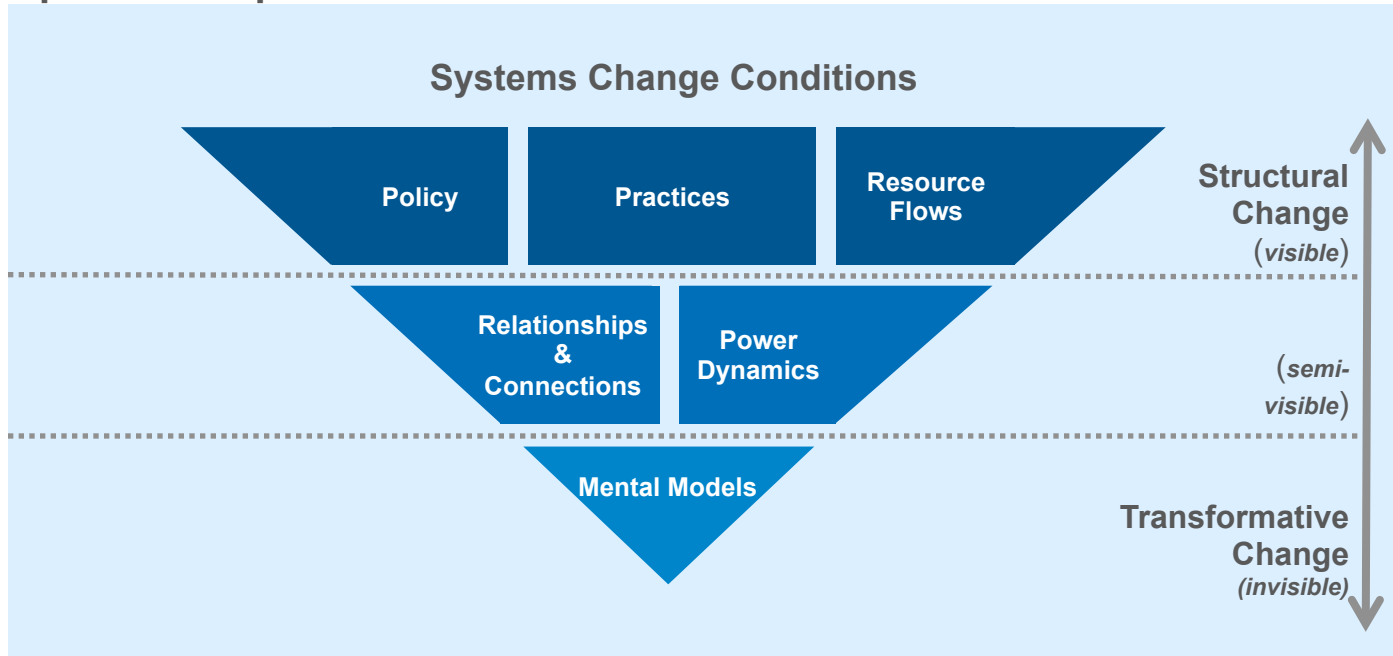
1. How is the initiative defining equity? What **capacities, actions, and representation** are part of how the initiative is acting on equity?
2. Is the **problem defined** by the initiative in such a way that success cannot happen unless equity is increased?
3. What will it take to advance equity actions even as the initiative is **strengthening capacity and representation**?
4. What are some of the types of **early changes and systems changes** that could help advance equity?
5. How can the initiative ensure it advances equity through not just systems changes, but also **changing power**, tackling **root causes**, and building on **community strengths**?

What is systems change?

Systems change is about
**shifting the conditions that are
holding a problem in place**

What are the conditions?

Systems change is about shifting the conditions that hold the problem in place.

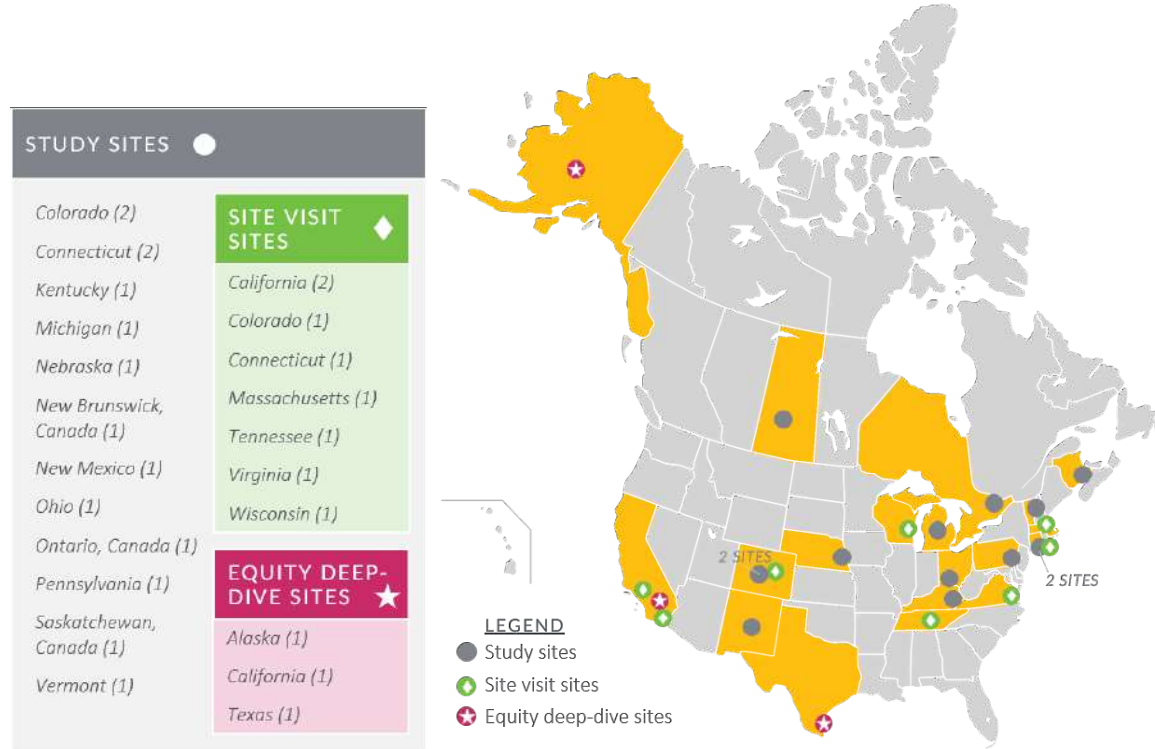




REIMAGINING SOCIAL CHANGE

An independent fieldwide study was commissioned to help answer a fundamental question

To what extent and under what conditions does the collective impact approach contribute to population level outcomes?





LIVING CITIES

INNOVATE ▶ INVEST ▶ LEAD

Disciplined Execution Matters

JaNay Queen Nazaire
Managing Director for Performance &
Results



**Collective Impact is
WHAT we do**

**Results-Based
Accountability is HOW
we do it**



LIVING CITIES

INNOVATE ▶ INVEST ▶ LEAD

What is Accountability?

What words come to mind?

- Transparency
- Responsibility
- Trustworthiness
- Clarity
- Liability
- Ownership
- Meaningful Data
- Scapegoat
- Others?

What emotions do you feel?

- Motivation
- Fear
- Apprehension
- Anxiety
- Safety
- Pride
- Pressure
- Others?



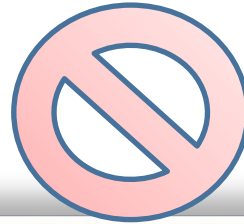
LIVING CITIES

INNOVATE ▶ INVEST ▶ LEAD

Why RBA?

RBA is an **ends to means** *framework that offers a disciplined way of thinking and taking action that:

- Communities can use to improve the **conditions of well being** for children, youth, families and the whole community, and
- Leaders can use to **improve the quality and effectiveness** of programs, agencies and service systems.



**Not about
compliance**



LIVING CITIES

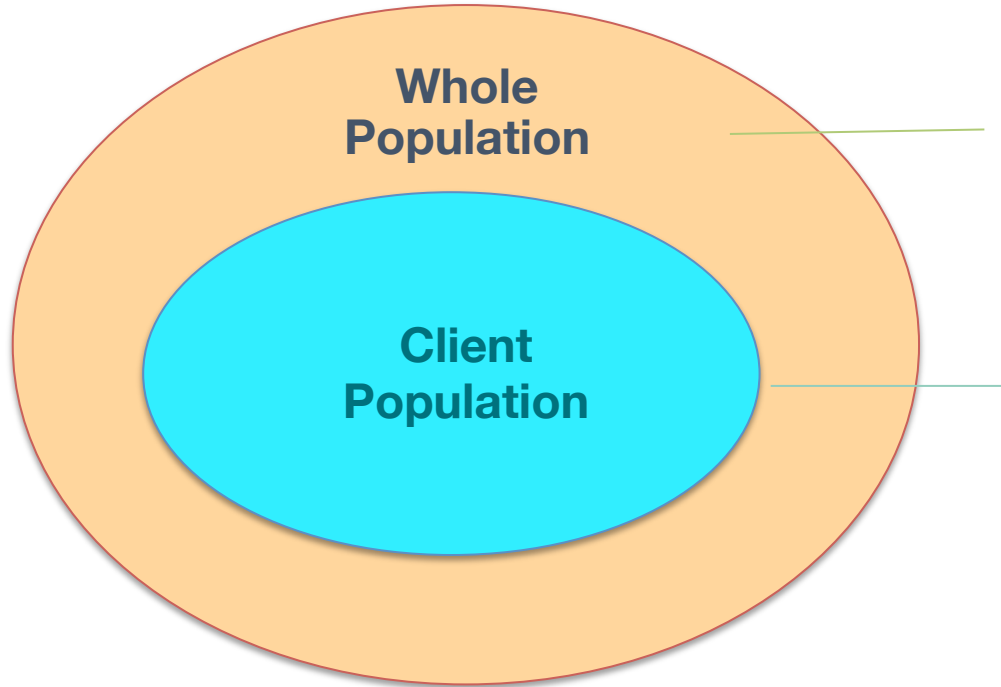
INNOVATE ▶ INVEST ▶ LEAD

Results-Based Accountability Key Principles

1. Identify the appropriate **level of accountability**:
 1. Population or whole community
 2. Performance - Service System, Agency, Division, Program, Initiative
2. Start at the **end** and work backwards **to means**
3. Use **Turn the Curve action planning** to work effectively with partners
4. Conduct a **root cause analysis** to close gaps
5. Use the following **three questions** to develop performance measures
 1. How much did we do?
 2. How well did we do it?
 3. Is anyone better off?
6. Maintain **language discipline**



Two Types of Accountability



Population Accountability

The well-being of **Whole Populations** in Communities, Cities, Counties, States, Nations

Performance Accountability

The well-being of **Client Populations** in Programs, Agencies, Service Systems, Collective Impact Initiatives

Sure glad the hole isn't at our end.



Start with the end...

Population Accountability

About the well-being of whole populations

Regions - States - Neighborhoods - Cities - Counties

RESULT

A condition of well-being for children, adults, families or communities

- Children enter kindergarten ready to learn
- Healthy Youth
- Households are economically secure and building wealth

INDICATOR

A measure which helps quantify the achievement of a result

- % of children demonstrating age-appropriate functioning
- % of youth participating in 60 minutes of physical activity per day
- Homeownership rates for black & Latinos in high income census tracts

Population
Accountability

Work backwards toward means...

Performance Accountability

About the well-being of client populations

The client base that is directly impacted by a program

PERFORMANCE
ACCOUNTABILITY

PROGRAMS/AGENCIES/STRATEGIES

Implemented programs, initiatives, systems, services and strategies that have a reasonable chance of influencing indicators and contributing to results.

i.e. Clean Air New Orleans – Connect Dallas - Indianola Promise, etc.

PERFORMANCE MEASURE

A measure of how well a program agency, service system, strategy or initiative is working.

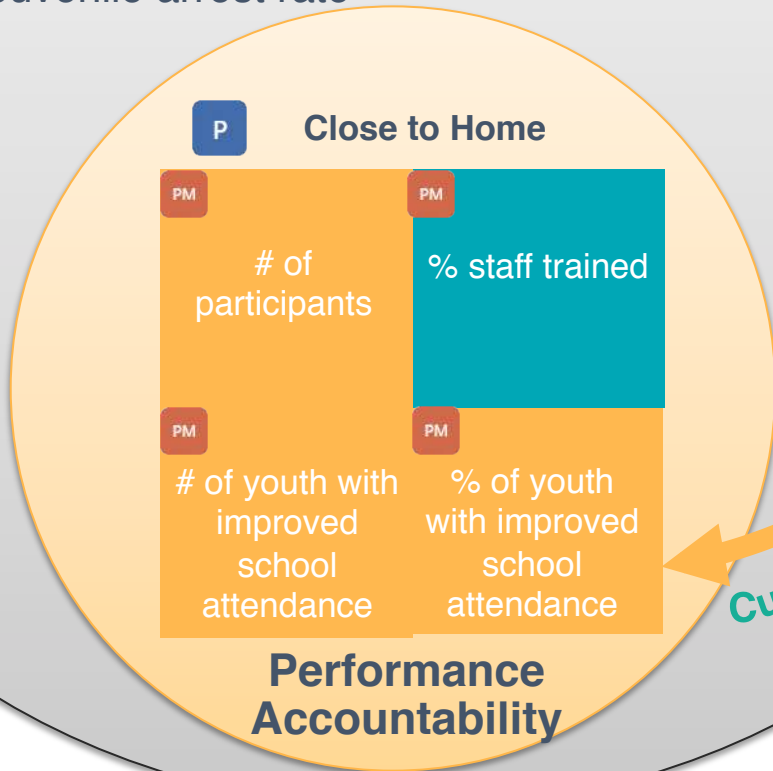
Three types:

- 1. **Quantity** How much did we do
- 2. **Quality** How well did we do it?
- 3. **Impact** Is anyone better off? = **Client Results/ Outcomes**

Population Accountability

Adapted from Clear Impact

- R** Youth are contributing members to their communities
- I** Juvenile arrest rate



Contributory relationship

Alignment of measures

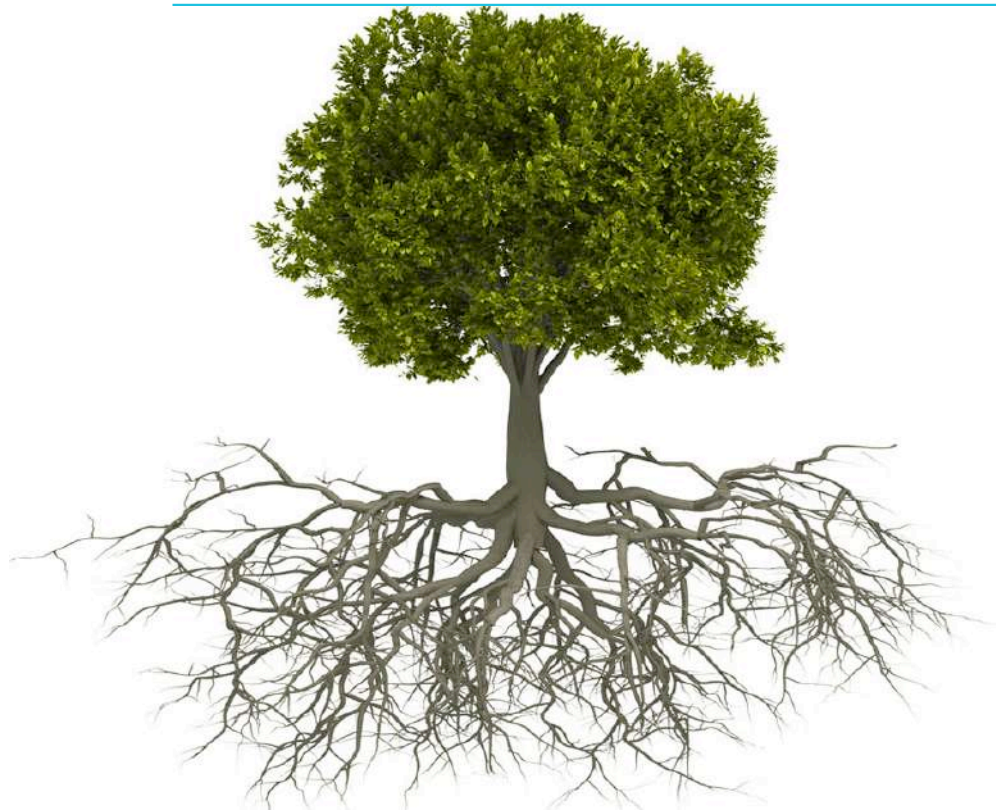
Appropriate responsibilities

Turn the Curve for a Population

1. What condition of well-being do we want for our community (**results**)?
2. What would these conditions look like if we achieved them?
3. What measures can we use to quantify these conditions (**indicators**)?
4. How are we doing on the indicators quantitatively (**data trend/gaps**) and qualitatively (**story behind the data/assumptions/root cause**)?
5. Who are the partners with a role to play (**across sectors/likely/unlikely**)?
6. What works to turn the curve of the baseline (**research/evidence/stories/lived experience/hypotheses**)?
7. What do we propose to do (**strategies/off the wall ideas**)?



Story Behind the Curve



Identify Root Causes

- ✓ Ask “why?” five times
- ✓ Identify positive and negative forces at work
- ✓ Prioritize root causes that will “Turn the Curve” of the baseline
- ✓ Create a research and partnership agenda
- ✓ Practice continuous improvement using root cause analysis

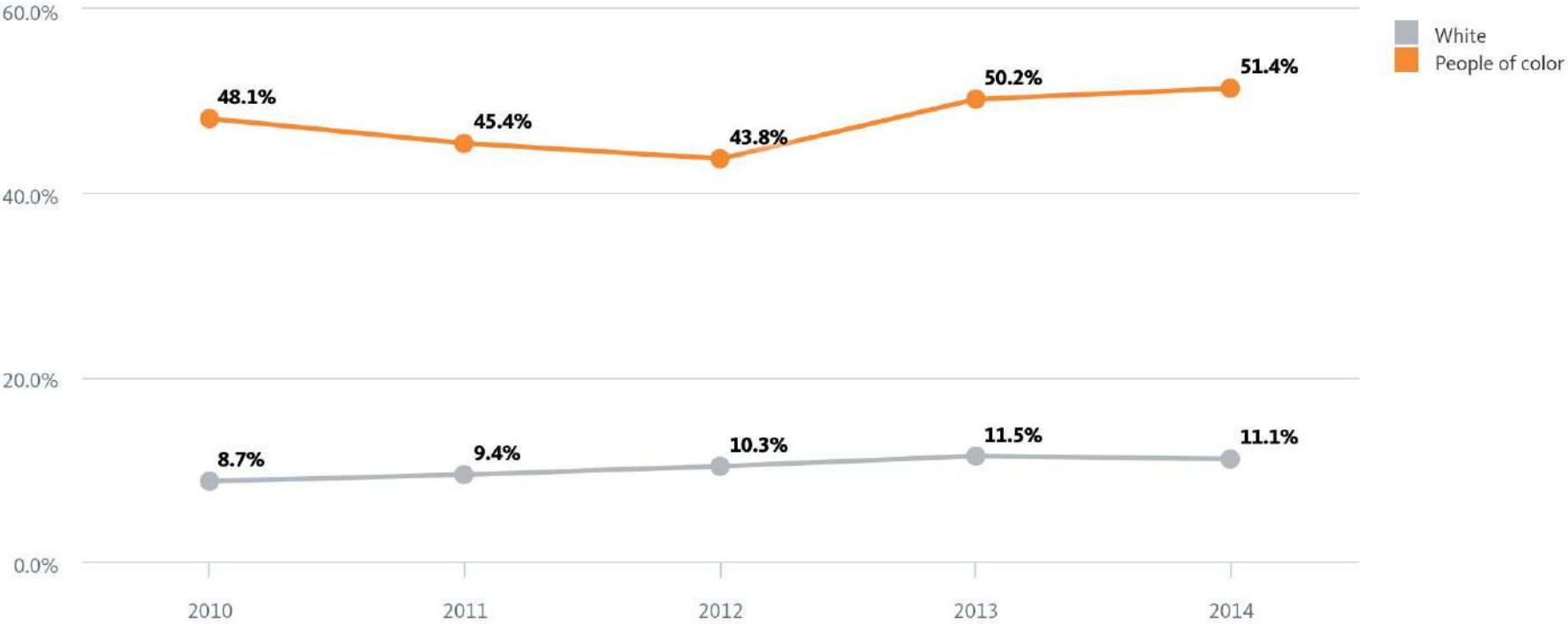
You can't get to ALL
without disaggregating
the data and solving for
the gaps!



LIVING CITIES

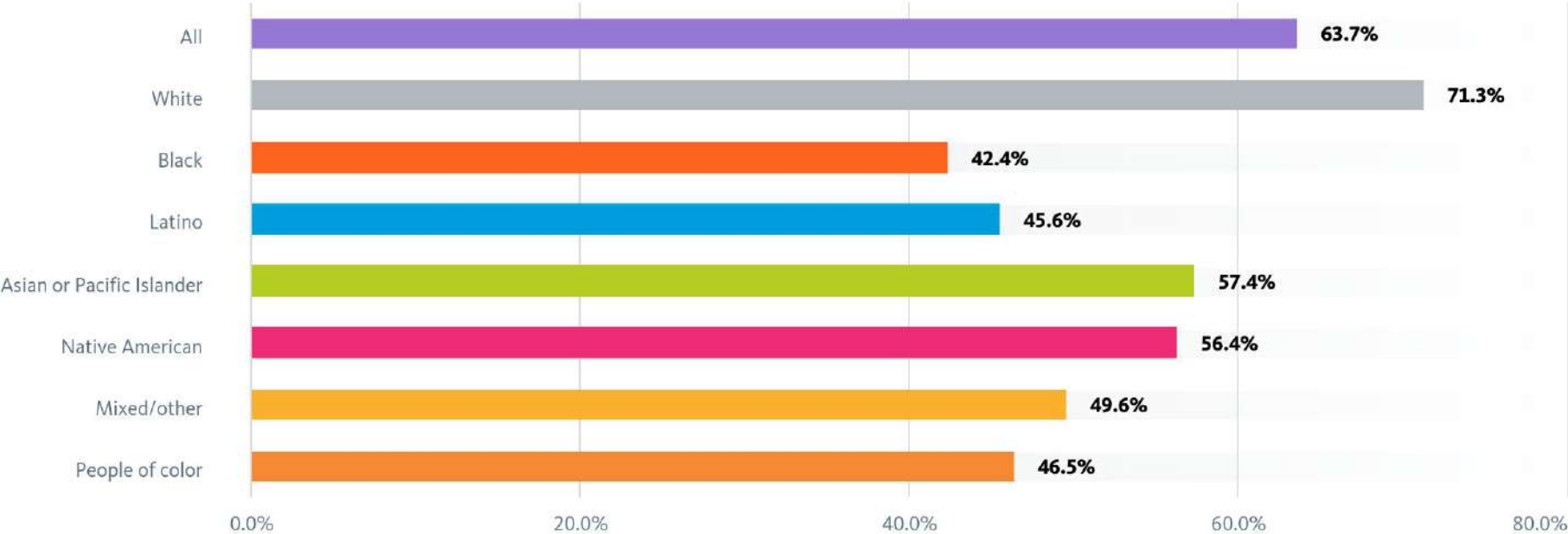
INNOVATE ▶ INVEST ▶ LEAD

Percent of students in high-poverty schools: United States, Primary schools, 2010-2014



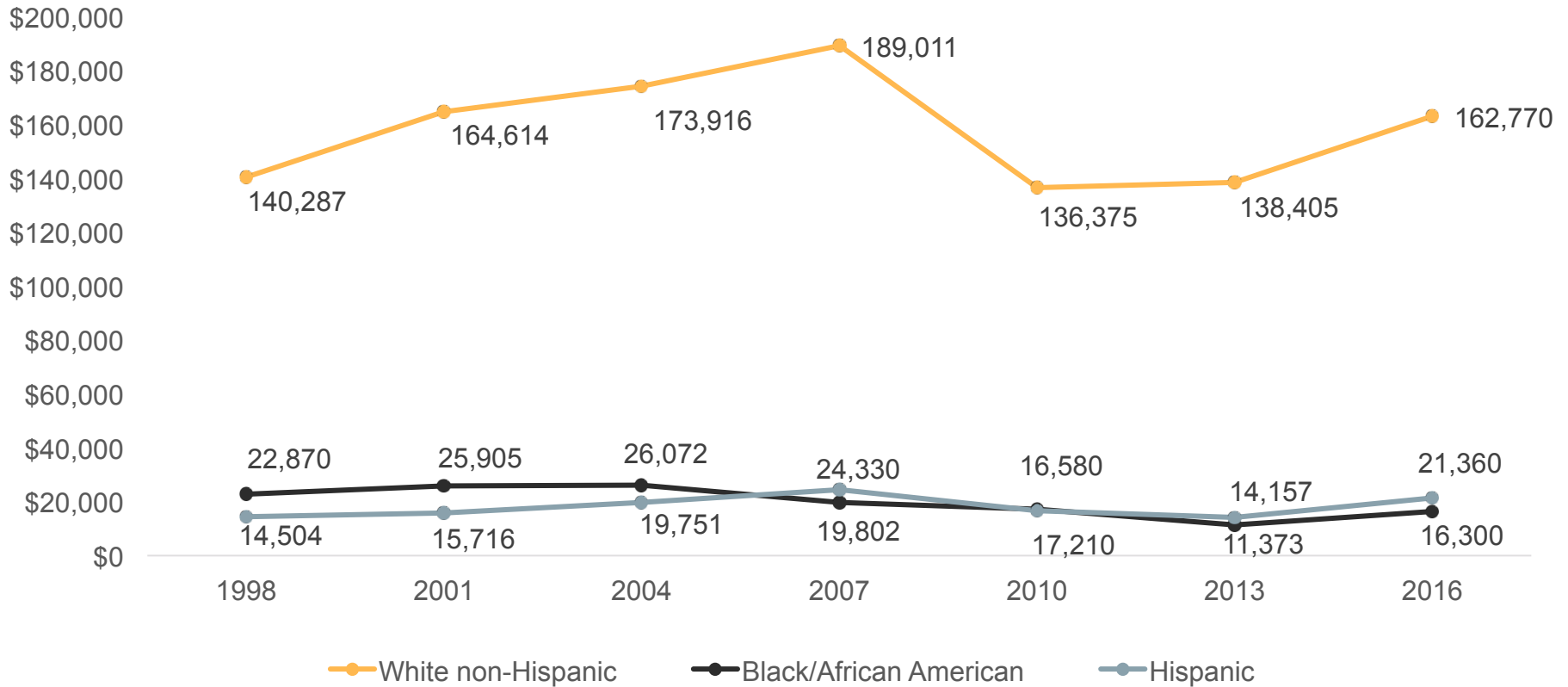
National Center for Education Statistics
PolicyLink/PERE National Equity Atlas, www.nationalequityatlas.org

Percent owner-occupied households by race/ethnicity: United States, 2015



IPUMS
PolicyLink/PERE National Equity Atlas, www.nationalequityatlas.org

Median net worth, by race/ethnicity (2016 dollars)



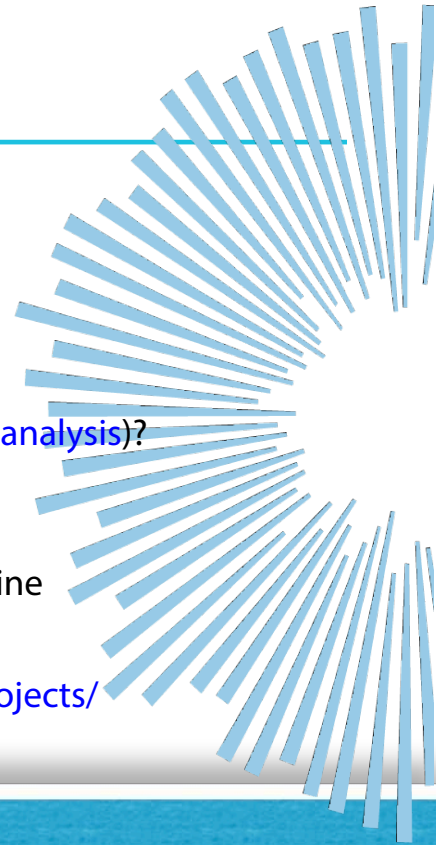
Story Behind the Curve: Digging Deeper

- Systemic Factors:
 - What institutions are involved? What unfair policies and/or practices are involved?
 - How did things get this way? What are the historical factors present? What are some of the cumulative impacts?
 - What are the racial inequities, barriers or negative outcomes involved in the problem being examined? Who is burdened the most and who benefits the most?
- Community Factors:
 - How are strengths and assets of the community discovered and used?
 - What social conditions or determinants contribute to this indicator?
 - What other compounding dynamics are involved (such as income or gender inequities?)
- Cultural Norms
 - What cultural norms, myths or popular ideas justify or maintain the problem?
- Historical Information
 - What can be learned from prior efforts to solve this issue or change the system?



Turn the Curve in Performance

1. Who are your clients/customers/people you are serving?
2. How can you measure if your clients are better off?
3. How can you measure the quality of service you provide?
4. How are you doing on these measures (**data and story/assumptions/root cause analysis**)?
5. Who are the partners with a role to play (**likely/unlikely**)?
6. What works (practices, processes, and/or policies) to turn the curve of the baseline (**research/evidence/stories/lived experience/hypotheses**)?
7. What do you propose to do, in what timeline and in what budget (**initiatives/projects/activities**)?



LIVING CITIES

INNOVATE ▶ INVEST ▶ LEAD

The Performance Accountability Questions

Quantity

Quality

Effort

How much did we do?

How well did we do it?

#

%

#

%

Effect

Is anyone better off?

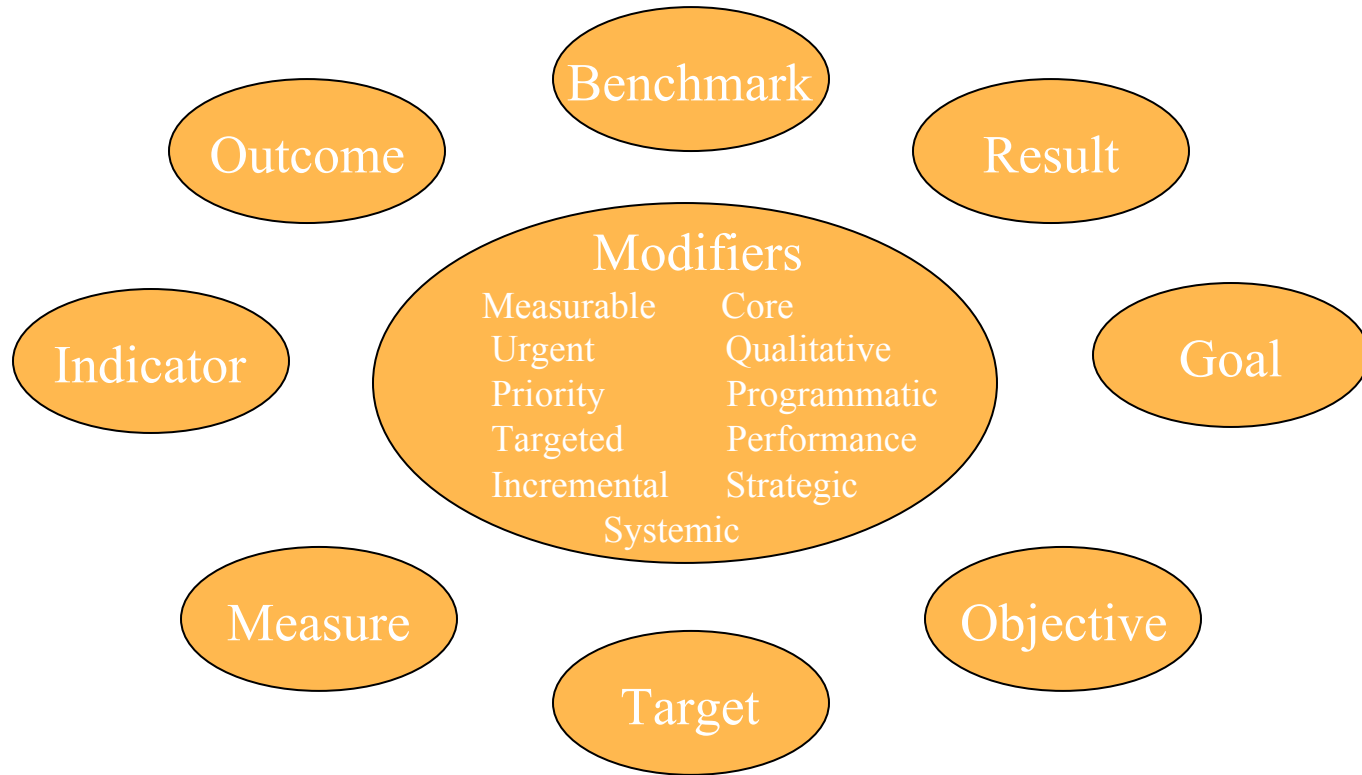
Adapted from Clear Impact

Sorting Performance Measures: What is Measured in Each Quadrant

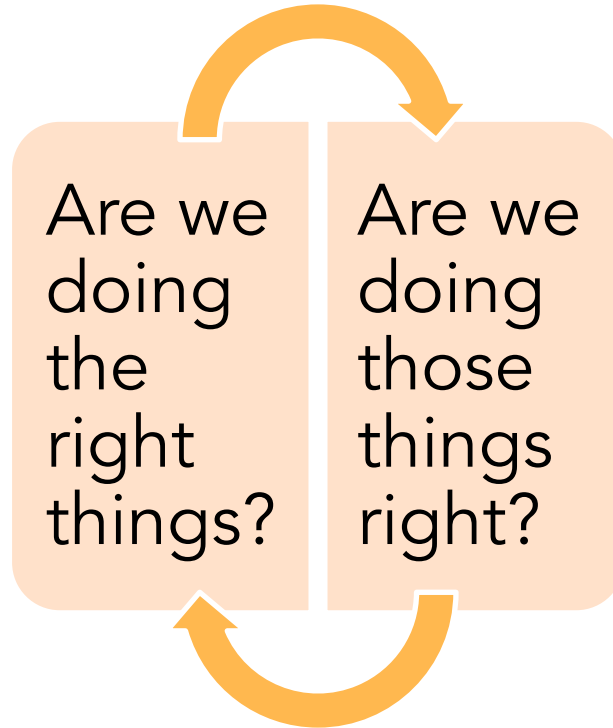
<p><u>How much did we do?</u></p> <p>#Clients/customers served</p> <p>#Activities (by type of activity)</p>	<p><u>How well did we do it?</u></p> <p>% Common measures e.g. client staff ratio, workload ratio, staff turnover rate, staff morale, % staff fully trained, % clients seen in their own language, unit cost</p> <p>% Activity-specific measures e.g. % timely, % clients completing activity, % correct and complete</p>
<p><u>Is anyone better off?</u></p>	
<p>#</p> <p>#</p> <p>#</p> <p>#</p>	<p>% Skills/Knowledge e.g. parenting skills</p> <p>% Attitude/Opinion e.g. toward drugs</p> <p>% Behavior e.g. school attendance</p> <p>% Circumstance e.g. working, in stable housing</p>

Maintain Language Discipline

Too many terms. Too few definitions. Too little discipline.



Disciplined Execution



Turn the Curve Practice

- Answer the seven (7) Population Questions
- Select no more than three (3) indicators
- Tap into the wisdom of the table & your devices to identify data trends
- Conduct a root cause analysis
- Identify at least one (1) unlikely partner
- Make time for crazy brainstorming
- Choose one (1) strategy to prioritize



LIVING CITIES

INNOVATE ▶ INVEST ▶ LEAD

ACHIEVING IMPACT AT SCALE IN THE EQUITY MOVEMENT

PolicyLink Equity Summit 2018

Jeff Bradach



Break cycles of poverty,
provide effective safety nets, &
ensure core human and civil rights

————— TO CREATE —————

A society characterized by
equality of opportunity
and justice

Four components of Bridgespan's racial equity commitment



CORE QUESTION

What does scale look like with
and without an equity lens?

Nine pathways that may help leaders grow impact to a transformative scale

ORGANIZATION-CENTRIC PATHWAYS

- Distribute through existing platforms
- Recruit & train other organizations
- Unbundle & scale for impact
- Leverage technology

FIELD-CENTRIC PATHWAYS

- Strengthen a field
- Change public systems
- Influence policy change
- Consider for-profit models
- Alter attitudes, behaviors & norms



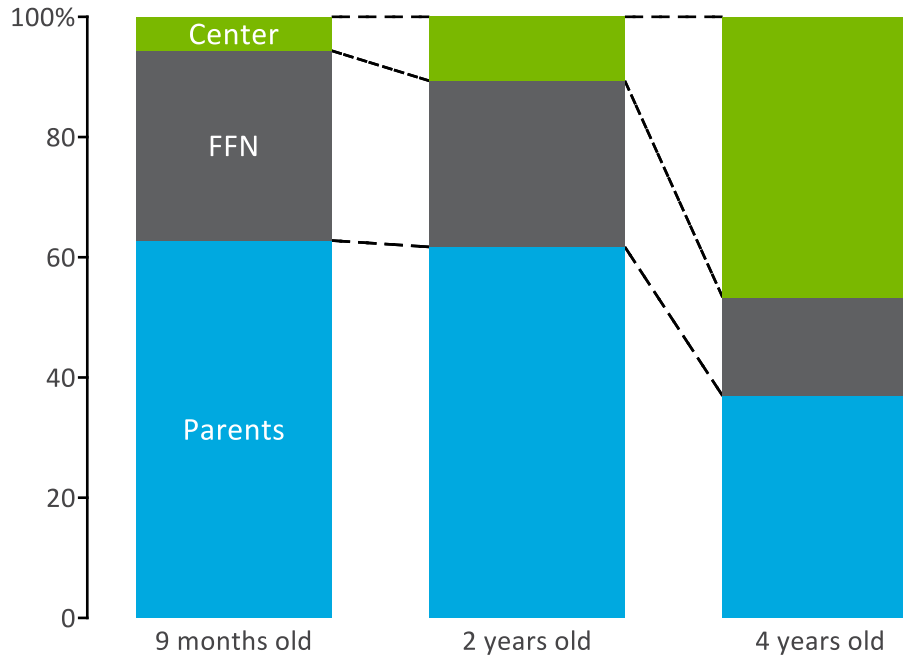
play matters for all kids

A photograph of a woman with dark, curly hair, wearing a light blue striped shirt, leaning over a baby lying on a white surface. She is smiling and holding the baby's hands. The background is bright and out of focus.

**STRONG
START**

Early childhood education: Where are the kids?


Percent of low-income (<200% FPL) children in kindergarten, at three ages



Ecosystem of scale: Key equity questions

- Who gets the opportunity to scale?
- What are the best strategies for scaling an organization's impact while simultaneously advancing equity?
- How can we best evolve broader structures and systems?

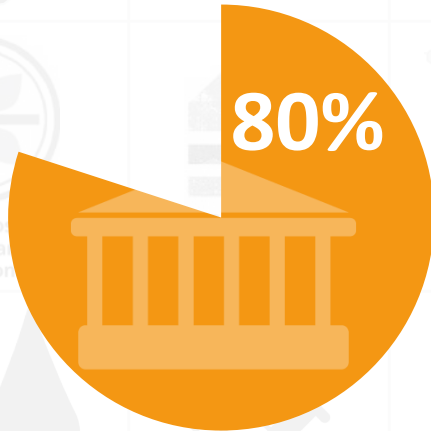
15 stories of audacious change

 <p>ANTI- APARTHEID MOVEMENT</p>	 <p>ARAVIND EYE CARE SYSTEM</p>		 <p>CPR</p>	 <p>FAIR FOOD CONSUMER-POWERED WORKER-CENTRED</p>
 <p>National Hospice and Palliative Care Organization</p>	 <p>FREEDOM TO MARRY</p>			 <p>911</p>
 <p>ORAL REHYDRATION</p>	 <p>POLIO</p>		 <p>123 SESAME STREET</p>	

15 stories of audacious change

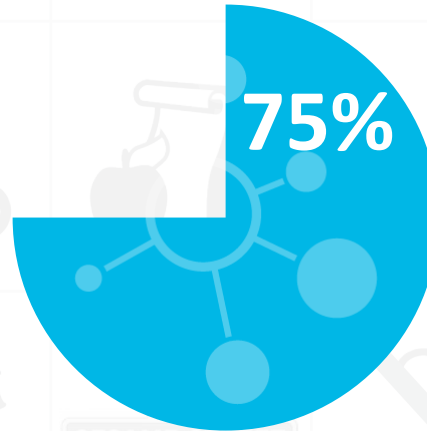
**INVOLVED CHANGES
TO GOVERNMENT
FUNDING OR POLICY**

80%



**REQUIRED
COORDINATION
ACROSS SECTORS**

75%



ORAL
REHYDRATION

REFLECT

What is the most important take-away for you/your organization about how an equity frame advances your ability to scale impact?



@BridgespanGroup

@JeffBradach

www.bridgespan.org