



Lunch & Learn #2; August 14, 2024

Prioritizing Lived Expertise to Transform Systems and Programs

Supplemental Resources

COLLABORATION, EQUITY AND COMMUNITY ENGAGEMENT

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OVERVIEW: EQUITY, ENGAGEMENT AND COLLABORATION

I. INTEGRATING 3 FOUNDATIONAL ELEMENTS OF COMMUNITY CHANGE (Slides 3-10)

- Equity
- Community Engagement
- Community Collaboration
- Breakout Group Discussion Materials

II. INTRODUCTION TO COLLECTIVE IMPACT (Slides 11-20)

- Definition of Collective Impact And Equity
- Five Conditions for Collective Impact
- Five Strategies for Centering Equity in CI
- Definition/Conditions for Systems Change
- Breakout Group Discussion Materials

III. COMMUNITY ENGAGEMENT (Slides 21-36)

- Defining Engagement/Why Engagement?
- Spectrum of Community Engagement

- Community Engagement Toolkit
- Assessment/Diagnosis Tools
- Breakout Group Discussion Materials

IV. TOOLS FOR EMBEDDING EQUITY (Slides 37-59)

- Process Mapping
- Targeted Universalism
- Equity Impact Analysis
- Preparing to Address Equity
- Breakout Group Discussion Materials

V. GROUP PROBLEM-SOLVING/STRATEGY SESSION (Slide 60)

RESOURCES; CONTACT INFORMATION (Slides 61-62)





I. INTEGRATING 3 FOUNDATIONAL ELEMENTS OF COMMUNITY CHANGE

- Definitions
 - Equity
 - Community Engagement
 - Collaboration
- Discussion Questions



I. Integrating 3 Foundational Elements of Community Change

➤ EQUITY

➤ COMMUNITY ENGAGEMENT

Three elements (concepts, practices, approaches) of large-scale community change can operate together to identify and implement community-generated strategies that improve outcomes and reduce disparities

➤ COLLABORATION



DEFINITION & DISCUSSION QUESTION: EQUITY

DEFINITION

Equity is fairness and justice achieved through systematically assessing disparities in opportunities, outcomes, and representation and redressing [those] disparities through targeted actions. [Centering Equity in Collective Impact](#)

EQUITY DISCUSSION QUESTION

How is your agency progressing in working with stakeholders impacted by disparities to understand the data and context for the disparities, identify root causes of disparities, develop and implement targeted strategies to address disparities and realizing decreases in disparities?



DEFINITION & DISCUSSION QUESTION: COMMUNITY ENGAGEMENT

DEFINITION

Community engagement is defined as the process of involving and collaborating with individuals, groups, or communities to address issues, solve problems, and make decisions that affect them. It is a two-way interaction that seeks to build relationships, share information, and gather input to ensure that the perspectives and needs of the community are considered in decision-making processes. [Ideascale](#)

COMMUNITY ENGAGEMENT DISCUSSION QUESTION

How is your agency progressing in engaging the community (especially those with lived experience, intended beneficiaries, CBOs working closely with families, and line staff from agencies, other unusual suspects) through building relationships with community-based organizations and residents, facilitating outreach from trusted partners, involving the community in planning, strategizing, services, program and system change and measuring and modifying strategies for continuous improvements?



DEFINITION & POLLING QUESTION

COMMUNITY COLLABORATION

DEFINITION

Community Collaboration means a process by which clients and/or families receiving services, other community members, agencies, organizations, and businesses make formal, sustained commitments to work together to accomplish a shared vision by sharing information, strategies and resources to fulfill a shared vision and goals. ([Law Insider.com/Office of Justice Programs](https://www.lawinsider.com/office-of-justice-programs))

COMMUNITY COLLABORATION DISCUSSION QUESTION

How is your agency's progressing in convening a cross-section of stakeholders, providing ongoing staff support and infrastructure, empowering them with decision-making power to work collectively to identify, implement and improve strategies for improving outcomes, and achieving better outcomes for clients?



BREAKOUT GROUP #1: INSTRUCTIONS

INSTRUCTIONS

1. You will be in groups of 4-6 people
2. The group will have 15 **minutes** for your discussion
3. You will receive notices when there are 5-minutes and 1-minute remaining
4. Ask a member to volunteer to lightly facilitate the discussion; ask for a volunteer to take notes and report out for the group
5. Begin by asking people to briefly introduce themselves, if needed
 - Name
 - Agency
 - Agency and Collaborative Role, if any
6. Possible discussion topics have been included, but the group is free to identify another topic/question for discussion



BREAKOUT GROUP #1 DISCUSSION QUESTIONS

EQUITY DISCUSSION QUESTION

How is your agency progressing in working with stakeholders impacted by disparities in understanding the data and context for the disparities, identifying root causes of disparities, developing and implementing targeted strategies to address disparities and realizing decreases in disparities?

COMMUNITY ENGAGEMENT DISCUSSION QUESTION

How is your agency progressing in engaging the community (especially those with lived experience, intended beneficiaries, CBOs working closely with families, and line staff from agencies, other unusual suspects) through building relationships with community-based organizations and residents, facilitating outreach from trusted partners, involving the community in planning, strategizing, designing services, programs and system change and measuring and modifying strategies for continuous improvements?

COMMUNITY COLLABORATION DISCUSSION QUESTION

How is your agency's progressing in convening a cross-section of stakeholders, providing ongoing staff support and infrastructure, empowering them with decision-making power to work collectively to identify, implement and improve strategies for improving outcomes, and achieving better outcomes for clients?



FULL GROUP: BREAKOUT #1

DEBRIEF QUESTIONS

1. What are some of the “headlines” from your discussions?
1. What are your takeaways regarding where your agencies are in integrating the three elements of community change into your work?
1. What are the challenges, successes and opportunities participants identified in implementing these methods?
1. What additional information/support do you want about using these approaches and tools?



II. ABOUT THE COLLECTIVE IMPACT APPROACH

- Definitions of Collective Impact and Equity
- Five Conditions for Collective Impact
- Five Strategies for Centering Collective Impact
- Definition/Conditions for Systems Change



Defining Collective Impact and Equity

Collective Impact 2.0*

Collective impact is a network of community members, organizations, and institutions that advance equity by learning together, aligning, and integrating their actions to achieve population and systems-level change.

Equity*

Equity is fairness and justice achieved through systematically assessing disparities in opportunities, outcomes, and representation and redressing [those] disparities through targeted actions.

https://ssir.org/articles/entry/centering_equity_in_collective_impact



Achieving Large-Scale Change through Collective Impact Involves Five Core Elements

Common Agenda

- **Common understanding** of the problem
- **Shared vision** for change

Shared Measurement

- **Collecting data** and **measuring results**
- **Continuous learning and improvement** by focusing on performance management
- **Shared accountability**

Mutually Reinforcing Activities

- **Differentiated approaches**
- Willingness to **adapt individual activities**
- **Coordination** through joint plan of action

Continuous Communication

- **Consistent** and **open communication** within the collaborative and with the public
- Focus on **building relationships and trust**

Backbone Support

- Dedicated **staff**
- Resources and skills to **convene** and **coordinate** participating organizations

ADAPT CORE ELEMENTS TO SPECIFIC CIRCUMSTANCES OF THE COMMUNITY AND INITIATIVE

Five Strategies for Centering Equity in Collective Impact



1. Ground the Work in Shared Language, Data & Context; Targeted Solutions

- Create a **shared language**; ground the work in **data and context**; and **target solutions** to groups with disparities

2. Focus on Systems Change

- Focus on **systems change**, in addition to **programs and services**.

3. Shift & Share Power

- **Shift and share power** within the collaborative and with community

4. Work with Community

- **Listen to and act with community**

5. Create Accountable Leadership

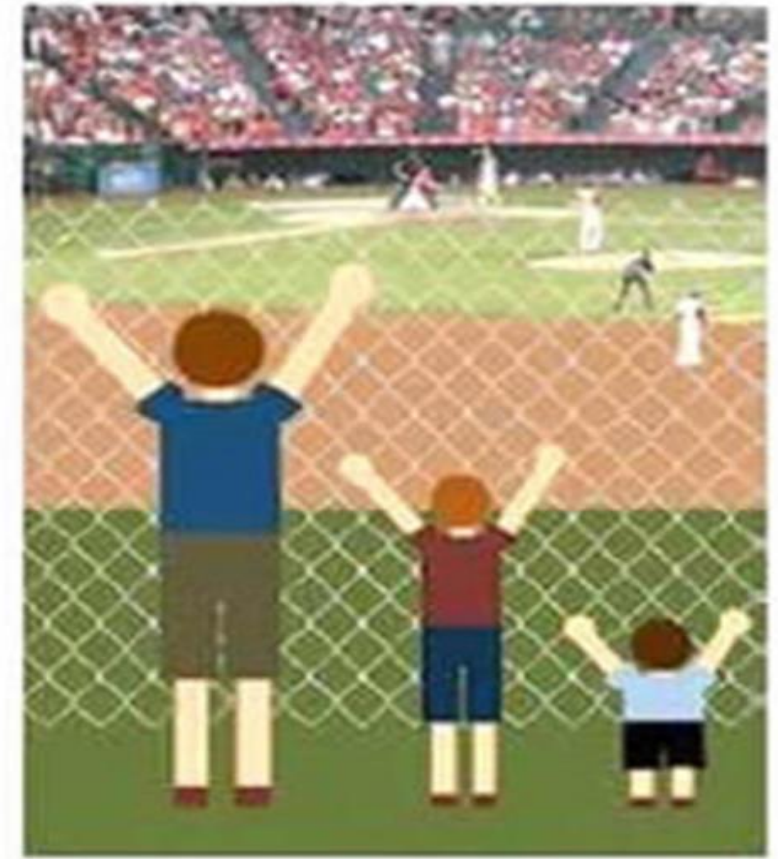
- Build equity **leadership and accountability** for results



In the first image, it is assumed that everyone will benefit from the same supports. They are being treated equally.



In the second image, individuals are given different supports to make it possible for them to have equal access to the game. They are being treated equitably.

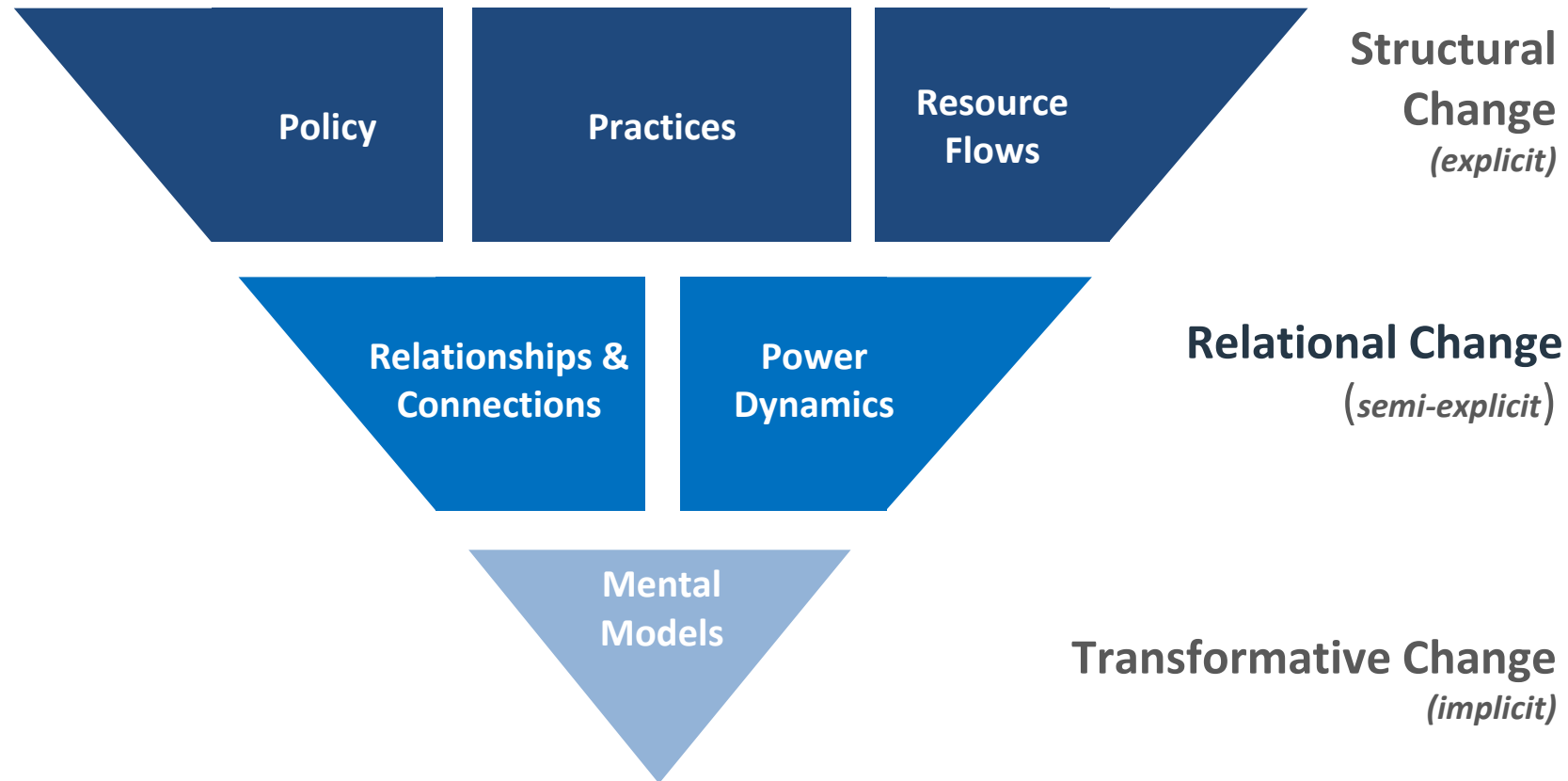


In the third image, all three can see the game without any supports or accommodations because the cause of the inequity was addressed. The systemic barrier has been removed.



Six Conditions of Systems Change

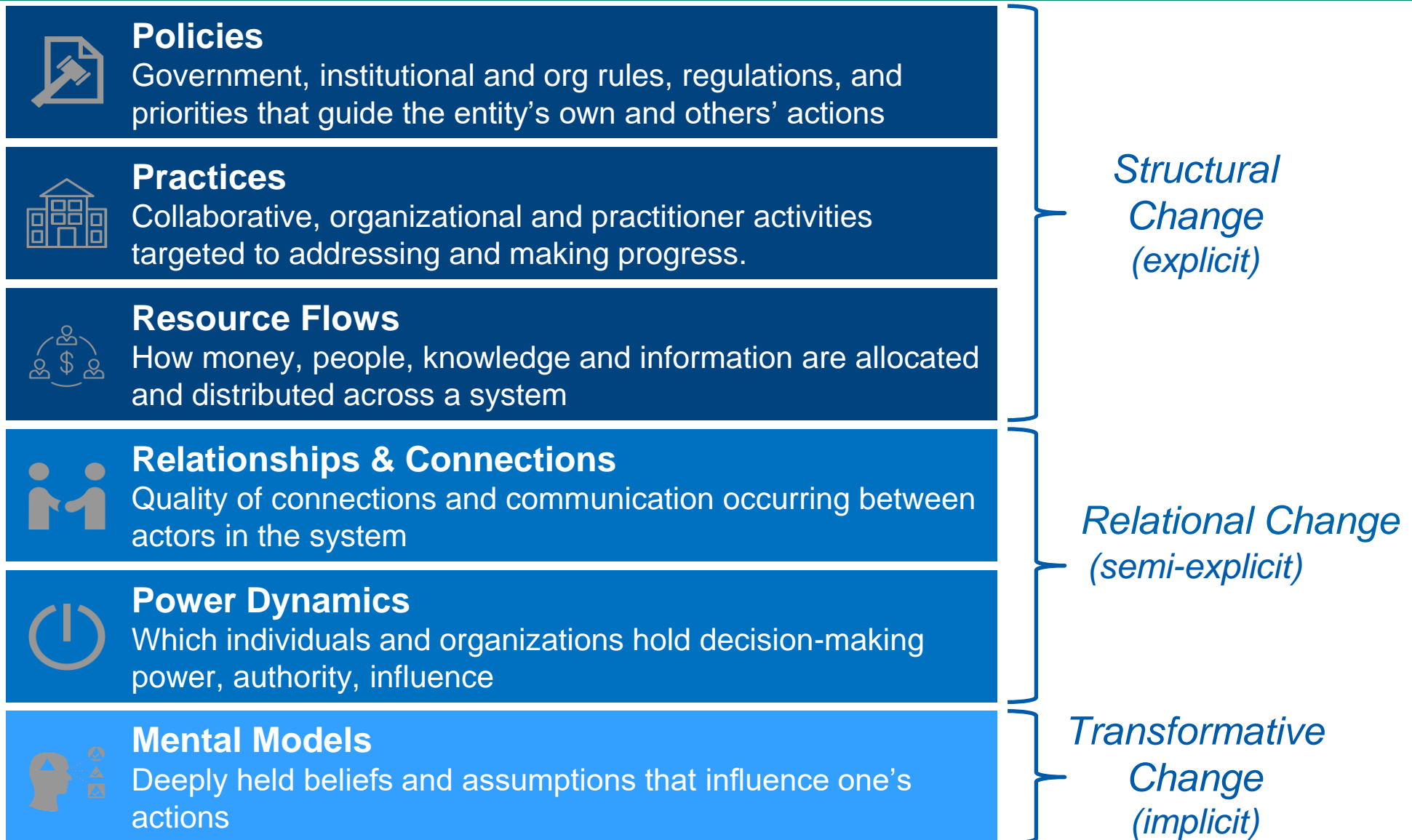
Systems Change Conditions



Source: *The Water of Systems Change*, John Kania, Mark Kramer, and Peter Senge, 2018



Definitions





BREAKOUT GROUP #2:

COLLECTIVE IMPACT INSTRUCTIONS

INSTRUCTIONS

1. You will be in groups of 4-6 people
2. The group will have 20 **minutes** for your discussion
3. You will receive notices when there are 5-minutes and 1-minute remaining
4. Ask a member to volunteer to lightly facilitate the discussion; ask for a volunteer to take notes and report out for the group
5. Begin by asking people to briefly introduce themselves
 - Name
 - Agency
 - Agency and Collaborative Role, if any
6. Possible discussion topics have been included, but the group is free to identify another topic/question for discussion



BREAKOUT GROUP #2:

COLLECTIVE IMPACT DISCUSSION QUESTIONS

Conversation:

1. Introduce yourself:

- Name
- Agency
- Agency, Collaborative Role, if any

2. As you think about the collective impact approach (conditions of collective impact, strategies for centering equity in collective impact and the water of systems change), please discuss the following questions:

Which of the three ..

- a. Are you already implementing? How successfully?
- b. Excites or concerns you the most? Why?
- c. Will be relatively easy/nearly impossible to implement locally? Why?



FULL GROUP: BREAKOUT #2

DEBRIEF QUESTIONS

1. What are some of the “headlines” from your discussions?
1. Where are your agencies in exploring or implementing the collective impact approach (conditions of collective impact, strategies for centering equity in collective impact and the water of systems change)?
1. What are the challenges, successes and opportunities participants identified in implementing these methods?
1. What additional information/support do you want about using these approaches and tools?



III. COMMUNITY ENGAGEMENT

- Defining Engagement/Why Engagement?
- Spectrum of Community Engagement
- Community Engagement Toolkit
- Assessment/Diagnosis Tools



DEFINING COMMUNITY ENGAGEMENT

DEFINITIONS

Community engagement is defined as the process of involving and collaborating with individuals, groups, or communities to address issues, solve problems, and make decisions that affect them. It is a two-way interaction that seeks to build relationships, share information, and gather input to ensure that the perspectives and needs of the community are considered in decision-making processes.

[Ideascale](#)

...the process of working collaboratively with and through groups of people affiliated by geographic proximity, special interest, or similar situations to address issues affecting the wellbeing of those people. It is a powerful vehicle for bringing about environmental and behavioral changes that will improve the health of the community and its members. It often involves partnerships and coalitions that help mobilize resources and influence systems, change relationships among partners, and serve as catalysts for changing policies, programs, and practices (CDC, 1997, p. 9).

https://www.atsdr.cdc.gov/communityengagement/pce_what.html





5 Reasons to Engage Community & Those with Lived Experience

1 Understand pressing systemic community challenges

- Understanding the issues
- Clarify questions that arise about the challenge

2 Co-create solutions

- Spark innovative problem-solving rooted in the “lived experience” of the community
- Identify and spread unique solutions that exist within the community

3 Verify the direction

- Get feedback on specific strategies and indicators from selected communities, particularly those who will be the ultimate beneficiaries

4 Expand the reach of strategies

- Expand the reach of adoption of initiative strategies
- Evoke and sustain the will to take aligned action

5 Build community capacity to lead and sustain change

- Train stakeholders in skills of effective collaboration and strategy execution
- Share resources and learning across the community to support scaling best practices





SPECTRUM OF COMMUNITY ENGAGEMENT

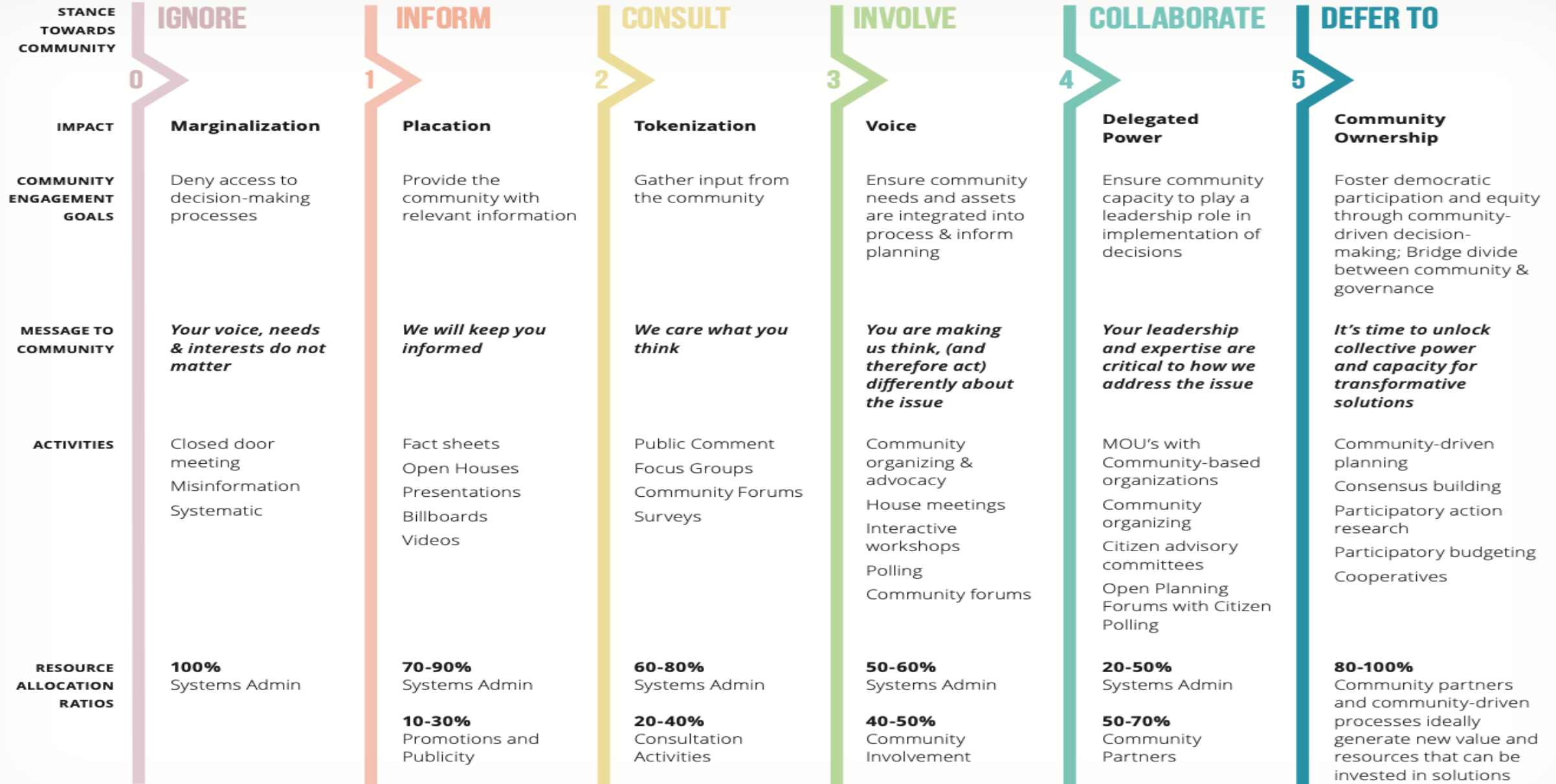
.Getting Clear on the Purposes and Intended Outcomes of Community Engagement,

RESOURCES

- [Community Engagement Toolkit](#), Collective Impact Forum
- [Community Toolbox](#), University of Kansas
- [What is Community Engagement? Definition, Principal, Example, Model, Framework, Strategies and Best Practices](#), Ideascale



THE SPECTRUM OF COMMUNITY ENGAGEMENT TO OWNERSHIP





Community Engagement Toolkit



LEADING INSIDE OUT
LEADERSHIP BEGINS WITHIN



**COLLECTIVE
IMPACT FORUM**



Community Engagement Toolkit

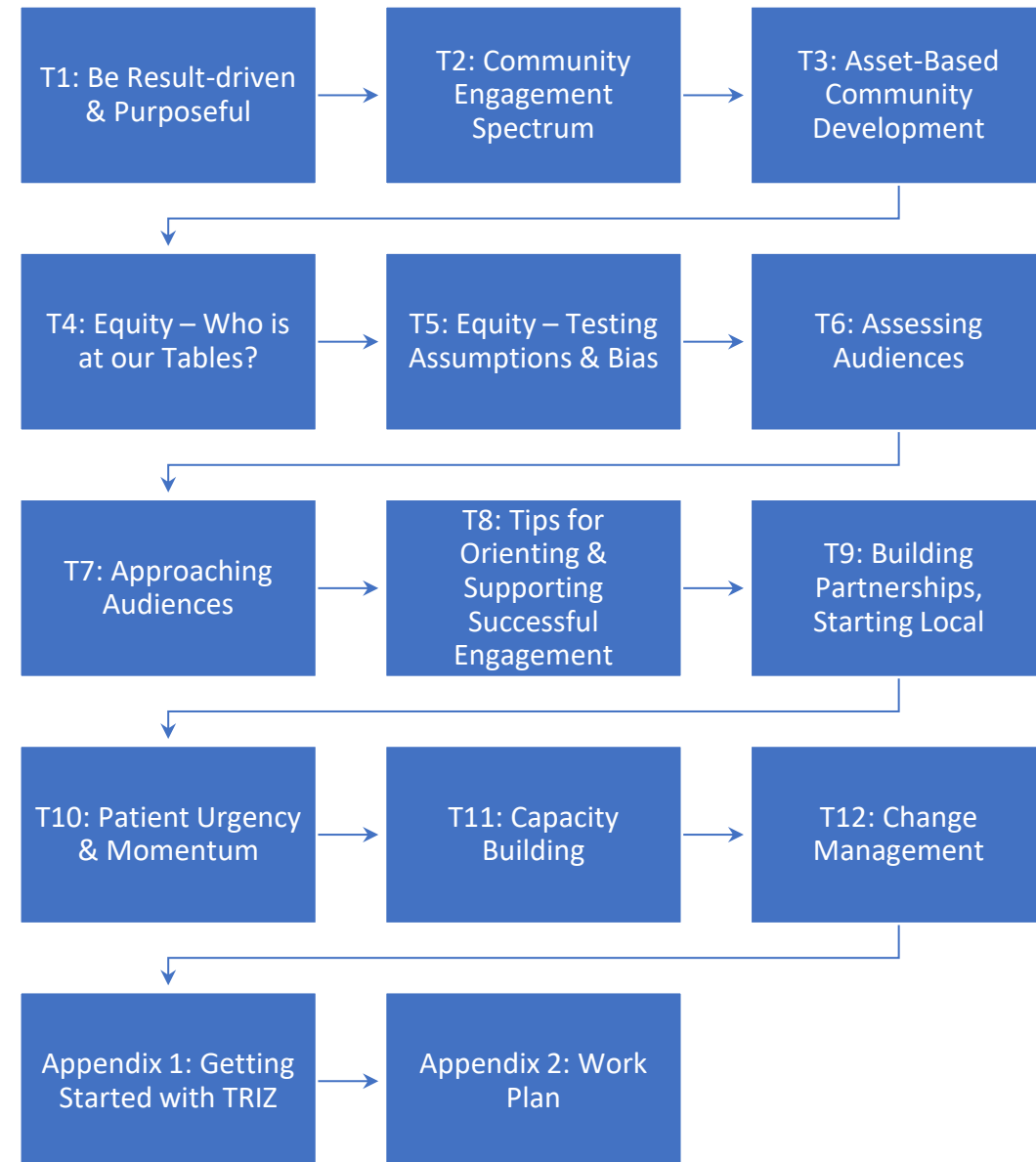
Paul Schmitz

<https://www.collectiveimpactforum.org/resources/community-engagement-toolkit>

Version 2.2

March 2017

12 TOOLS IN COMMUNITY ENGAGEMENT TOOLKIT



Appendix 2: Work Plan

1. **Clarify purpose for community engagement and how it will contribute to better results.** Revisit the first worksheet and re-assess how engagement will support each of your goals/outcomes.
1. **Identify your Community Engagement Strategy.** Along the community engagement spectrum, identify your strategy, communicate it, and fulfill promises made to the community.
1. **Practice Asset-Based Community Development.** Consider roles community residents and grass roots leaders can play as leaders and partners in your effort. Then begin building relationships to engage them.
1. **Build equity at your tables.** Assess the degree to which your teams bring contextual expertise about the population, neighborhoods, and issues you serve. What gaps exist?
1. **Test assumptions and biases.** Test your interpretations of data, assumptions, and conclusions with diverse stakeholders. Consider how your perspective might be biased or distorted, and how you might surface that?
1. **Assess potential audiences for engagement.** Consider how each group could support results, why they care, and how they would benefit from participating?
1. **Approach priority audiences.** Specifically identify who you will engage and evaluate how you can meet them where they are, engage their assets, and overcome their barriers to participation.
1. **Review Engagement Tips.** What action steps will you take to ensure that those you engage feel valued and set up for success?
1. **Build Partnerships, Start Local:** Who else is already contributing to the result? Who has relationships in the community that we could engage and build on?
1. **Practice patient urgency and build momentum.** What will you need to slow down or trade-off to advance your goals, and what early wins can you achieve?
1. **Build Capacity:** What capacities will you need to build and investments will you need to make to practice engagement?
1. **Change Management.** What will be implications of your engagement for current stakeholders? What change management practices will you need to implement?



SELF-ASSESSMENT GUIDE: DOMAINS OF ACTIVITY

<p>A. Purposes/Results of Community and Tribal Engagement</p> <p>A clear understanding of the purpose and goals for community and tribal engagement guides the group's activities and practices.</p>	<p>B. Constituent Representation</p> <p>Having diverse representation of constituents at planning and implementation tables is essential to understanding the problem and identifying effective solutions.</p>	<p>C. Clear Scope of Work, Results/Outcomes and Decision-Making Responsibility</p> <p>Collaborative groups need a clear scope of work which identifies the products they are to create, the issues to address, the outcomes, and the timeline to complete their tasks. The group needs to know what decisions they have the authority to make and what decision-making rules they will employ.</p>
<p>D. Orientation and Capacity Building for Participants</p> <p>Supporting new and existing CPP team participants with orientation, trainings, and context around prevention planning and implementation.</p>	<p>E. Qualified Staffing and Support for Participants</p> <p>Not all staff/partners are skilled or want to lead community engagement efforts. Making sure that the staff/partners assigned to support engagement work are skilled in theory and practice and want/enjoy a role in supporting diverse engagement. This is some of the most challenging work and it is not for everyone.</p>	<p>F. Effective, Inclusive Meetings Leading to Action/Results</p> <p>A collaborative and inclusive process involves participants actively involved in the planning and/or implementation of meetings.</p>
<p>G. Data, Learning Agenda and Continuous Improvement</p> <p>Agendas that strategically rely on data to guide understanding and action contribute to continuous quality improvement.</p>		



Community Engagement Situation Analysis

1. **WHO IS BEING ENGAGED?** Who is the community? Who are the Families? Who are the Parents? Who are the Caregivers?
1. **WHY?** Why are families, parents being engaged? Why now? What are the lessons from prior efforts at engagement that should inform the current effort?
1. **WHAT OUTCOMES?** What outcome is being sought through the parent and family engagement? How will population level prevention outcomes and community engagement program performance be measured?
1. **BY WHOM?** Who will be planning, leading and supporting engagement? Does it include people with lived expertise and intended beneficiaries?
1. **WHO IS ACCOUNTABLE FOR RESULTS?** Who is accountable for producing the intended outcomes of the engagement? How are they being supported? How will success be rewarded?



Community Engagement Situation Analysis

4. BY WHOM? Who will be planning, leading and supporting engagement? Does it include people with lived expertise and intended beneficiaries?

- Who is leading the community engagement work? What is their expertise? What is their credibility with community?
- How have those with lived expertise been engaged in planning and implementing engagement strategies and activities
- What training and support is provided to those planning and leading the engagement efforts?



Community Engagement Situation Analysis

5. WHO IS ACCOUNTABLE FOR RESULTS? Who is accountable for producing the intended outcomes of the engagement? How are they being supported?

- What are the outcomes and performance measures for community engagement?
- Who is accountable for producing engagement outcomes?
- How are they supported? Trained?
- How are they evaluated and required to improve?
- How is excellence in community engagement valued and rewarded?



BREAKOUT GROUP #3:

COMMUNITY ENGAGEMENT INSTRUCTIONS

INSTRUCTIONS

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4. Ask a member to volunteer to lightly facilitate the discussion; ask for a volunteer to take notes and report out for the group
5. Begin by asking people to briefly introduce themselves, if needed
 - Name
 - Agency
 - Agency and Collaborative Role, if any
6. Possible discussion topics have been included, but the group is free to identify another topic/question for discussion



BREAKOUT GROUP #3: COMMUNITY ENGAGEMENT

DISCUSSION QUESTIONS

Conversation:

1. Introduce yourself:
 - Name
 - Agency
 - Agency, Collaborative Role, if any

2. As you think about the Spectrum of Community Engagement, please discuss the following questions:
 - A. Where are you on the spectrum of community engagement right now?
 - Given local policy requirements and agency philosophy, where do you want to be on the spectrum for this round of prevention planning?
 - Where on the spectrum are your mid- to long-range goals for community engagement? (Do you plan/desire to move to greater engagement and collaboration?)

 - B. If your agency goal is to move to the right on the spectrum of community engagement, how should you structure the process for caretaker and youth information gathering and participation in planning to lay a foundation for engagement work in the future?



FULL GROUP:

BREAKOUT DISCUSSION #3 DEBRIEF QUESTIONS

1. What are some of the “headlines” from your discussions?
1. What are your takeaways regarding where your agencies are and where they want to go with community engagement in your work?
1. What are the challenges, successes and opportunities participants identified in implementing these methods?
1. What additional information/support do you want about using these approaches and tools?



COMMUNITY ENGAGEMENT

RESOURCES

- [Community Engagement Toolkit](#), Collective Impact Forum
- [Community Toolbox](#), University of Kansas
- [What is Community Engagement? Definition, Principal, Example, Model, Framework, Strategies and Best Practices](#), Ideascale

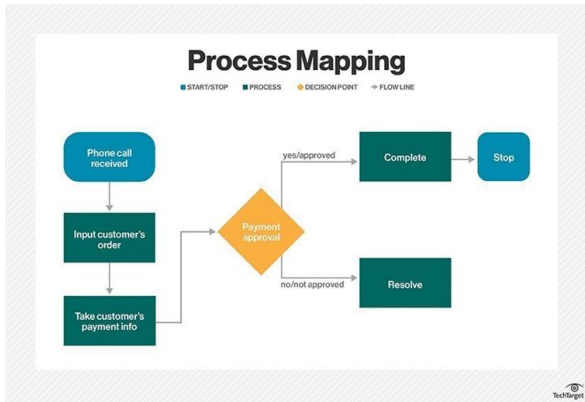




IV. TOOLS FOR EMBEDDING EQUITY

- Processing Mapping
- Targeted Universalism
- Equity Impact Analysis
- Preparing to Address Equity

PROCESS MAPPING: A Tool to Align the Decision-Making Process and Data



Visual Description: A process map (flow chart) is a planning and management (diagnostic) tool that visually describes the flow of activities and actions related to a body of work...

Problem-Solving Tool: Process maps provide insight into a process/system, help teams brainstorm ideas for process/system improvement, increase communication, provide process documentation, and help to identify bottlenecks, repetition, delays and where disparities enter and exist.

Disparities Identification Tool: When combined with data, process maps are a tool for identifying the location (and possible sources) of disparities in the process.

Resource-Lucid Charts <https://www.lucidchart.com/pages/process-mapping>



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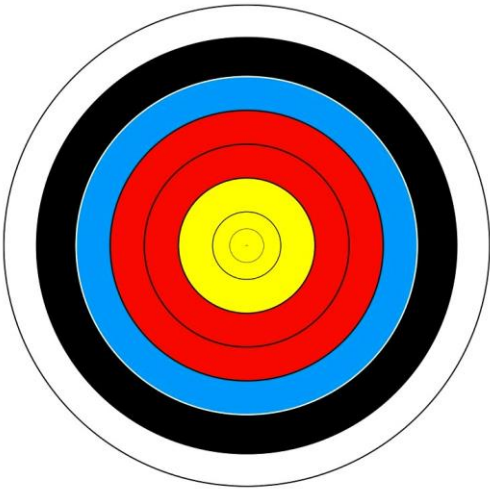
Process Mapping: COVID-10 Example

RACIAL-ETHNIC GROUPS	TEST BY RACE/ETH/10,000	POSITIVE TEST BY RACE/ETH /1000	LEVEL OF CARE- IN-PATIENT OXYGEN-VENTILATION	RATE OF INFECTIONS/10,000	HOSPITALIZATION / 10,000	DEATH RATE/10,000
ASIAN	345	220	11%	76	15.9	4.3
BLACK	489	219	11%	107	24.6	5.6
HISPANIC	461	311	10%	143	30.4	5.6
WHITE	408	113	9%	46	7.4	2.3
TOTAL	423	159		67	12.9	3.3



Tools for Targeting Equity Strategies & Actions

Targeted Universalism



Equity Impact Analysis





Defining Targeted Universalism

“Fairness is not advanced by treating those who are situated differently as if they were the same...A targeted universal strategy is one that is inclusive of the needs of both the dominant and marginal groups but pays particular attention to the situation of the marginal group.”

john a. powell, Post-Racialism or Targeted Universalism, 86 Denv. U. L. Rev. 785 (2008), Available at: <https://lawcat.berkeley.edu/record/1121801>



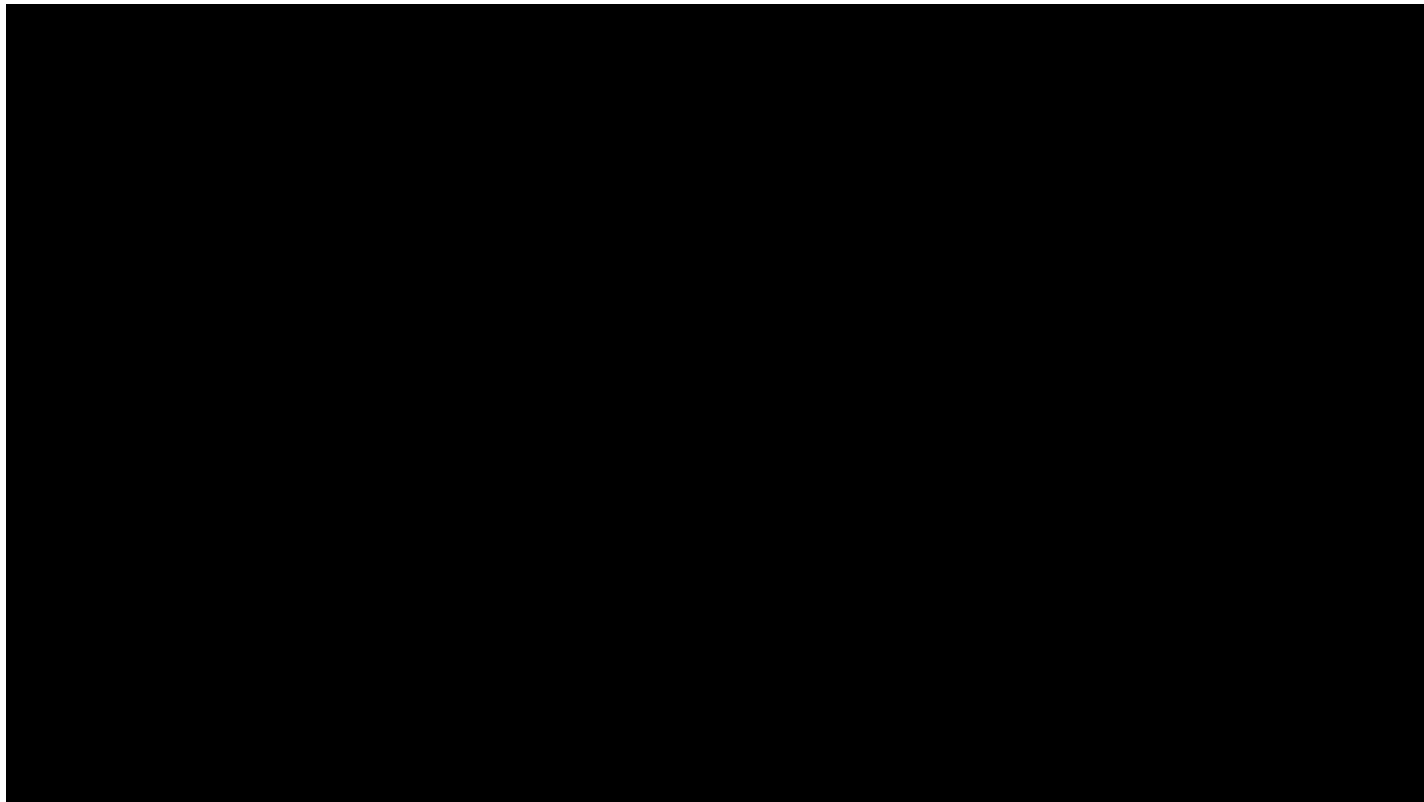
Targeted Universalism

Targeted Universalism



Targeted Universalism means setting universal goals that can be achieved through targeted approaches for segments of the population

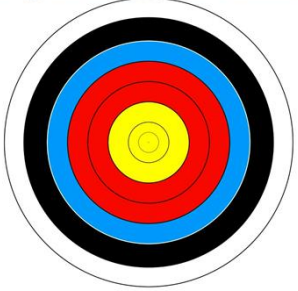
<https://www.youtube.com/watch?v=a0At2xbQB7w&feature=youtu.be>



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Targeted Universalism

Targeted Universalism



Targeted Universalism means setting universal goals that can be achieved through targeted approaches for segments of the population

5 STEPS FOR IMPLEMENTATION

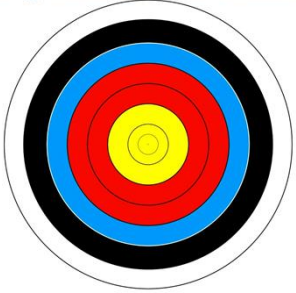
- 1. Define Universal Goal** -Establish a universal goal
- 2. Measure Overall Population** -Measure how overall population fares relative to universal goal
- 3. Measure Population Segments** -Measure performance of population segment relative to universal goal
- 4. Understand Group-Based Factors** -Understand how structures and other factors support or impede group's progress toward universal goal
- 5. Implement Targeted Strategies** -Create and implement targeted strategies so each group can achieve universal goals



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Sample Targeted Universalism Analysis Products

Targeted Universalism



Step	Approach
1) Establish a universal goal	100% proficiency in Staten Island 3 rd grade reading
2) Measure the overall population performance	47% of Staten Island 3 rd graders are proficient in reading
3) Measure the performance across population segments	White: 63% Asian: 60% Black: 32% Latinx: 32%
4) Identify the influential barriers to progress for each population segment	White Asian Black Latinx
5) Implement targeted strategies to better support each group in achieving the goal	<ul style="list-style-type: none"> Specific strategies implemented to support each group in achieving the goal based on their unique needs Examples: Common Core materials for all grades 1-2; Reading tutorials for ELL students



Equity Impact Analysis

Equity Impact Analysis

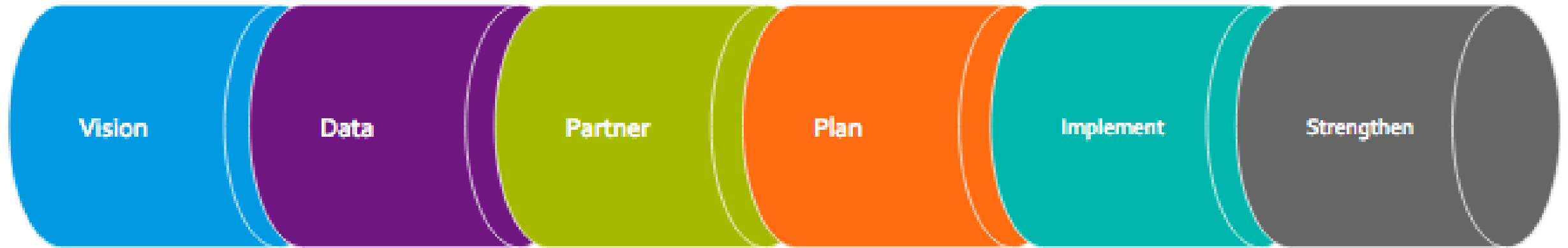


- ❑ An Equity Impact Analysis is a process in which a public agency or community group **analyzes how a budget, policy or practice decision is likely to impact different sub-groups.**
- ❑ **Modeled after the environmental impact statements** to anticipate the positive and negative environmental effects of proposed policy decisions on development projects.
- ❑ These analyses can help local leaders to **understand the equity implications of an existing or proposed policy, program, or practice, and to determine how the decision will impact existing economic and social inequities.**
- ❑ The framework for an equity impact analysis is a structured analysis that **can be applied to any standard policy or decision-making process** to identify populations likely to be affected and identify steps to close existing gaps and/or mitigate unintended consequences.
- ❑ Most frequently used for analysis of race disparities but **can be applied to any sub-group in the population.**

[Source-PolicyLink-https://allincities.org/toolkit/racial-equity-impact-assessments](https://allincities.org/toolkit/racial-equity-impact-assessments)



A racial equity tool is a simple set of questions.



What is our vision for the future?
How will we measure progress?

What are the data? What do these data tell us?

How can we continually partner with the communities most impacted?

Who benefits or will be burdened by this proposal?
What are our strategies to advance racial equity or mitigate unintended consequences?

What is our plan for implementation, incorporating racial equity strategies?

How will we hold ourselves accountable, communicate results and keep improving?



Racial Equity Tools Content Comparison

GARE TOOL

1. **Proposal:** What is the policy, program, practice or budget decision under consideration? What are the desired results and outcomes?
2. **Data:** What's the data? What does the data tell us?
3. **Community Engagement:** How have communities been engaged? Are there opportunities to expand engagement?
4. **Analysis and Strategies:** Who will benefit from or be burdened by your proposal? What are your strategies for advancing racial equity or mitigating unintended consequences?
5. **Implementation:** What is your plan for implementation?
6. **Accountability and Communication:** How will you ensure accountability, communicate, and evaluate results?

KING COUNTY TOOL

- Phase 1:** Scope. Identify who will be affected
- Phase 2:** Assess equity and community context
- Phase 3:** Analysis and decision process
- Phase 4:** Implement. Are you staying connected with communities and employees?
- Phase 5:** Ongoing Learning. Listen, adjust, and co-learn with communities and employees.

SEATTLE TOOL

- Step 1:** Set Outcomes
- Step 2:** Involve Stakeholders + Analyze Data
- Step 3:** Determine Benefit and/or Burden
- Step 4:** Advance Opportunity of Minimize Harm
- Step 5:** Evaluate. Raise Awareness. Be Accountable
- Step 6:** Report Back

Equity Impact Analysis



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Strategy #1D: Targeting Disparities Examples

Sample Equity Impact Analysis Products

Equity Impact Analysis



Case Study: Minneapolis Public Schools

Proposed Initiatives: A school board proposal to cut school district operating costs by reorganizing school enrollment and transportation routes

Data Collection Processes:

- Interdepartmental team created win for the school district
- Held meetings among school board staff and leaders
- Data collected:
 - Student enrollment differences by resident zone and broken down by students of color and English language learners
 - Enrollment trends over the last five years for kindergarten and certain grades
 - Attrition within the public schools
 - Number of magnet programs
 - Proposed school closures
 - Programs proposed to be closed
 - Number of students who would and would not have to change schools
 - Cost savings for each initiative
 - Number and racial percentages of students who would be disrupted

Strategy #1D: Targeting Disparities Examples

Sample Equity Impact Analysis Products

Equity Impact Analysis



Case Study: Minneapolis Public Schools

Results:

- Plan A (establishment of solid school boundaries) saved \$8.5 million, but disrupted 9,200 students (39% of students of color; 52% of white students)
- Plan B (rebalance zone capacity) saved \$8.2 million, while disrupting 8,550 students (43% of students of color; 33% of white students)
- Plan C (closure of schools) saved \$9 million, and only disrupted 4,920 students (22% of students of color; 25% of white students)

Next Steps: Data was further broken down by race and culture to understand how the district's initiative options would impact certain communities (American Indian and Somali communities, in particular); stakeholders were engaged in collective problem solving, and viable options for both communities were established



Preparing to Address Equity in Collaborative Work

Essential Activities...

1. Know the laws, funder requirements and organizational policies related to diversity, equity and inclusion
2. Conduct local equity landscape analysis
3. Engage leadership/community in preparing for and leading for equity
4. Prepare stakeholders for equity work
5. Obtain leadership commitment to equity planning and action for results
6. Plan and Build Infrastructure for the Equity Journey
7. Agree on scope and boundaries of equity work



PREPARING TO ADDRESS EQUITY

Collaborative initiatives need to...

- 1. KNOW THE LAWS, FUNDER REQUIREMENTS AND ORGANIZATIONAL POLICIES RELATED TO DIVERSITY, EQUITY AND INCLUSION** - leaders know and understand laws, organizational policies and funder requirements affecting DEI work and build approaches to navigate the legal and policy terrains
- 2. CONDUCT LOCAL EQUITY LANDSCAPE ANALYSIS** - conveners identify local leaders and organizations already working on equity and engage them as partners/leaders in equity efforts.
- 3. ENGAGE LEADERSHIP/COMMUNITY IN PREPARING AND LEADING FOR EQUITY-** leaders have been engaged in, made commitments to and been trained on providing leadership on equity.
- 4. PREPARE STAKEHOLDERS FOR EQUITY WORK** - conveners explain the law, policy and risks of equity work to stakeholders and the legal and mental health supports available; expect attrition
- 5. OBTAIN LEADERSHIP COMMITMENT TO EQUITY PLANNING AND ACTION FOR RESULTS-** recruit, retain, and support vocal leadership through a chorus of community voices for equity and rewarding effective leadership for equity
- 6. AGREE ON THE SCOPE & BOUNDARIES OF EQUITY WORK** - collaborative members agree on the boundaries of the equity work—what is on and off the table.
- 7. PLAN AND BUILD INFRASTRUCTURE FOR EQUITY-** the collaborative makes a commitment to



ROADMAP FOR THE COLLABORATIVE EQUITY JOURNEY

(1 OF 4)

1. KNOW THE LAWS, FUNDER REQUIREMENTS AND ORGANIZATIONAL POLICIES RELATED TO DIVERSITY, EQUITY AND INCLUSION

- **Know the Federal, State and Local Laws Related to DEI:** With assistance of legal counsel, collect, interpret and understand any organizational, funder, local, state laws or regulations related to diversity, equity and inclusion work and develop a thorough understanding of them.
- **Know the Funder Requirements Related to DEI:** With your financial management staff, clarify requirements and prohibitions from various funding sources regarding work related to DEI
- **Know your Organizational Policies Related to DEI:** With Executive Staff, review and determine organizational policies which provide guidance related to DEI work

2. CONDUCT LOCAL LANDSCAPE ANALYSIS

- **Identify local actors already working on equity,** learn about their work, support their work and invite them to participate
- **Understand the history** of racial/ethnic, gender and other equity issues in the community
- **Determine if and how you can work with various local equity efforts** (when you have framed and formed your equity work)



ROADMAP FOR THE COLLABORATIVE EQUITY JOURNEY (2 OF 4)

3. PREPARE STAKEHOLDERS FOR EQUITY WORK

- **Explain the Law and Risks:** Explain to stakeholders the laws, policies regarding DEI work and advise them of possible risks.
- **Arrange for Supports:** Arrange for legal, mental health and coaching support for those engaged in the DEI work.
- **Expect Attrition:** Given the current climate around DEI, expect some people to depart the process.

4. ENGAGE LEADERSHIP/COMMUNITY IN PREPARING FOR AND LEADING FOR EQUITY

- **Work with a diverse group** of collaborative/organizational /community leaders, solicit their support and work with them to develop their understanding of and commitment to the equity journey. Support them in developing leadership skills for equity.
- **Form planning group** to do outreach to stakeholders to ascertain their interests and develop their support
- **Planning team uses stakeholder input to frame issues and approach** (i.e., equity broadly or focus on racial equity; demographic characteristics of population warranting inquiry on disparities [race/ethnicity, gender, income level, LGBTQAI+, rural/urban, other])



ROADMAP FOR THE COLLABORATIVE EQUITY JOURNEY

(3 OF 4)

5. OBTAIN LEADERSHIP COMMITMENTS TO EQUITY PLANNING AND ACTION FOR RESULTS

- **Recruit and retain** collaborative leaders committed to equity
- **Provide training, support and rewards** to collaborative leaders who demonstrate effectiveness
- **Support** collaborative leaders in making **public commitments to equity** by **creating a chorus of community leaders** voicing consistent and unapologetic support for equity work

6. PLAN AND BUILD INFRASTRUCTURE FOR THE EQUITY JOURNEY

- **Local Expertise:** Identify stakeholders with interest and expertise to join planning team or serve as resource people
- **Data System:** Assess data systems' capacities for disaggregated data analysis; begin/review disaggregated data for patterns of disparities; assess data capacity building needs of partners
- **Definitions:** Gather and organize definitions of key data/research terms related to equity work in anticipation of working with collaborative to define key terms

7. SCOPE & BOUNDARY CONSIDERATIONS IN PREPARING TO ADDRESS EQUITY

Have you considered, decided whether the initiative will focus on...

- **INDIVIDUALS VS. ORGANIZATIONAL VS. SYSTEMS CHANGE:** An Individual (personal), organizational or structural/systemic change focus or some combination?
- **PROGRAMS/SERVICES VS. SYSTEMS/POLICY CHANGE:** A focus on programs/services for those experiencing disparities vs. system(s)/policy change, or both?
- **HISTORICAL MYTHS VS. HISTORICAL ACCURACY:** A process to understand and acknowledge historical and contemporary contexts of equity issues (nationally and locally) vs. avoiding acknowledgement of historical factors contributing to disparities?
- **TARGETED STRATEGIES VS UNIVERSAL STRATEGIES:** Targeted strategies/interventions focused on those experiencing disparities vs. universal strategies/interventions, or both?
- **OPPORTUNITIES VS OUTCOMES:** A focus on equal opportunity vs. equal outcomes, or both?
- **REDUCING/ELIMINATING DISPARITIES VS UNIVERSAL GOAL:** A goal to reduce/ eliminate disparities vs. achieving universal goal, neither or both?



Strategy: Targeting Disparities Tools and Resources

- Targeted Universalism Othering and Belonging Institute, UC Berkeley
- Equity Impact Analysis, PolicyLink
- Government Alliance on Race and Equity (GARE) Toolkit
- Racism as a Root Cause Approach: A New Framework, Zea Malawa, MD, MPH; Jenna Gaarde, MPH; Solaire Spellen, MPH, American Academy of Pediatrics (2021)



BREAKOUT GROUP #4: TOOLS FOR EMBEDDING EQUITY INSTRUCTIONS

INSTRUCTIONS

1. You will be in groups of 4-6 people
2. The group will have 20 **minutes** for your discussion
3. You will receive notices when there are 5-minutes and 1-minute remaining
4. Ask a member to volunteer to lightly facilitate the discussion; ask for a volunteer to take notes and report out for the group
5. Begin by asking people to briefly introduce themselves
 - Name
 - Agency
 - Agency, Collaborative Role, if any
6. Possible discussion topics have been included, but the group is free to identify another topic/question for discussion



BREAKOUT GROUP #4: DISCUSSION TOPICS

Conversation:

1. Introduce yourself:
 - Name
 - Agency
 - Agency, Collaborative Role, if any
2. As you think about the tools for embedding equity in your work (process mapping, targeted universalism and equity impact analysis) and the essentials of preparing to address equity, which of these approaches:
 - a. Is your agency already exploring or implementing? How successfully?
 - b. Excites or concerns you the most? Why?
 - c. Will be relatively easy/nearly impossible to implement locally? Why?



FULL GROUP:

BREAKOUT DISCUSSION #4 DEBRIEF QUESTIONS

1. What are some of the “headlines” from your discussion?
1. Where is your agency in exploring or implementing process mapping, targeted universalism, equity impact analysis and the essentials of preparing to address equity?
1. What are the challenges or opportunities for implementing these tools to accelerate your progress?
1. What additional information/support do you want about using these practices?



V. GROUP PROBLEM-SOLVING/STRATEGY SESSION

INSTRUCTIONS

- The final hour of program will be devoted to **identifying and strategizing about challenges, opportunities, successes and dilemmas in your work**
- We'll begin by asking you to **briefly summarize an issue/topic/question you want to discuss**. We will record your suggestions and spend a few minutes organizing and crudely prioritizing them.
- To help us sort and organize ideas for prioritizing we'll create **four poster sheets: one for EQUITY, COMMUNITY ENGAGEMENT, COMMUNITY COLLABORATION , & OTHER TOPICS**; As folks identify topics, we will record them on the relevant sheet.
- We will do a **rough poll or ask about burning issues** for individuals as a method of sequencing the discussions
- Then we'll provide an opportunity to discuss each one as time permits and get both peer and faculty ideas
- We'll discuss as many of the topics as possible in the allotted time.

Collective Impact, 10 Years Later: 15 Unique pieces



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