Equity Continuum: Beginning, iterating and sustaining the equity journey

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Overview

This article presents a framework to help organizations improve their focus and impact on equity. The framework, developed by Public Equity Group (PEG), with input from PolicyLink, CFLeads and The Bridgespan Group, is intended to help organizations understand where they are along an "equity continuum" and how to map and plan a unique equity journey towards mission, program, and operations alignment -- and impact.

This article begins by outlining the concept of an equity journey and explains how PEG's work over the last decade has led to development of the Equity Continuum, a framework to help organizations move along this journey, regardless of their starting point. The article then outlines the key elements of the framework, showing how they can be targeted toward multiple dimensions of an organization: its mission and purpose; leadership and governance; intended impacts; programs; staffing; operations; economics and culture.

After this high-level overview, several versions of the Equity Continuum are outlined in greater detail, explaining how the framework(s) can be used in a number of different ways. A more detailed version of an Equity Continuum for Community Foundations is presented. Illustrative tools and resources, along with guiding questions are outlined, to provide insight into what kinds of tools organizations might use to advance equity . The article then highlights brief case examples from organizations that have made progress on their equity journey. PEG's experience

has shown that working with experienced coaches and strategy consultants often allows an organization to take on the equity journey most deeply and effectively.

Equity Journey

Most organizations in the US must grapple with the fact that - in nearly any community, and within nearly any "domain" (e.g., education, health care, economic security, climate risk) - individuals furthest from opportunity are people of color.

Many organizations have focused on this imperative since their inception. PEG itself was formed to support organizations committed to racial and economic equity, especially given the gap we saw in resources and support for these organizations. Increasingly, PEG has supported more "mainstream" organizations (including community-based organizations, anchor institutions, and philanthropic organizations) eager to increase their focus on racial and economic equity (among other aspects of equity). Working with these organizations, alongside our clients who have been focused on equity for a longer period of time, has helped us understand the evolution of the equity journey and led to the development of the Equity Continuum.
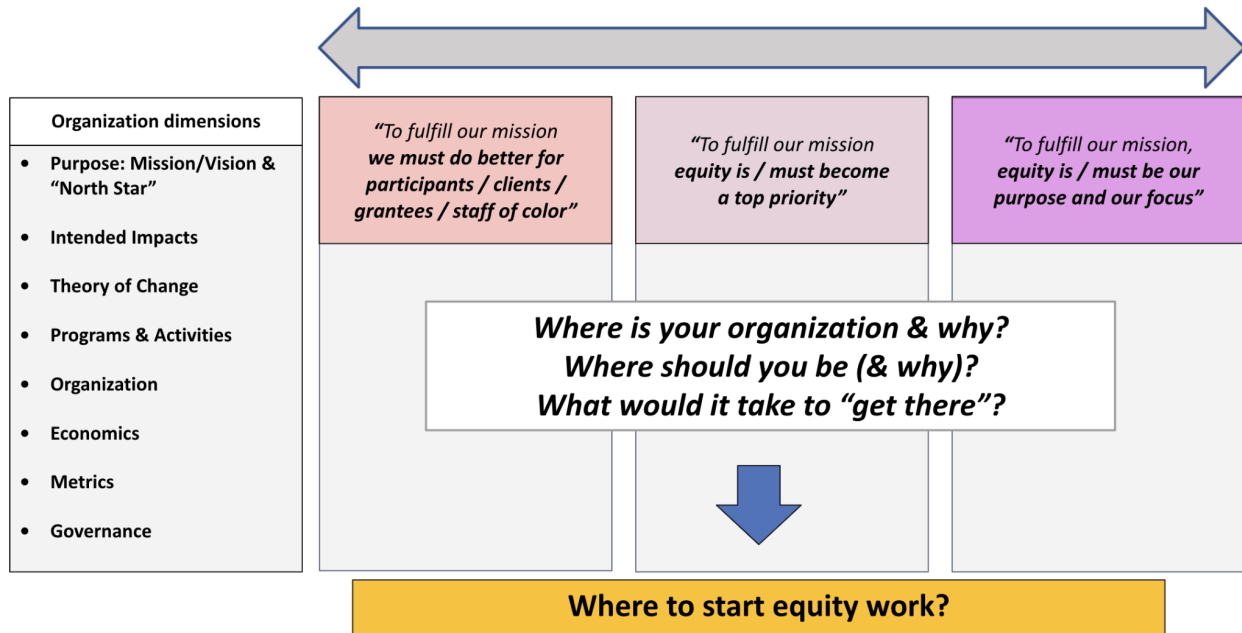
Keys to the Equity Continuum
1. Equity is a journey
2. No single starting point nor final destination
3. The work is holistic
4. The process is iterative

Our work over the past ten years led us to develop the Equity Continuum, a framework that:
- outlines a theoretical organization journey towards greater equity;
- identifies three key stages within the journey; and
- notes organizational dimensions that may prove important to consider along the way.

The Equity Continuum is a tool that can be used in several different ways. One approach is to engage in a diagnostic process to assess where an organization might be across a number of dimensions. The visual below offers a possible framework for doing so:

Equity Continuum

Organization dimensions
- Purpose: Mission/Vision & "North Star"
- Intended Impacts
- Theory of Change
- Programs & Activities
- Organization
- Economics
- Metrics
- Governance

"To fulfill our mission we must do better for participants / clients / grantees / staff of color"

"To fulfill our mission equity is / must become a top priority"

"To fulfill our mission, equity is / must be our purpose and our focus"

Where is your organization & why?
Where should you be (& why)?
What would it take to "get there"?

Where to start equity work?

We believe that most organizations working towards equity find themselves on a continuum. Organizations on the right side of the continuum are 100% equity-focused, often because the organization was founded to advance the needs and priorities of people and communities of color, low-income people, immigrants, and other groups facing historic inequities.

Organizations on the left side of the continuum often have goals intended to promote equity (e.g., "we want 100% of our students to complete college") but may need to be more explicit about who is farthest from opportunity (including by disaggregating data and exploring history and root causes), and detailing the shifts to programs, practice, policy, systems, funding, and more are required to achieve more equitable outcomes -- all of which requires increasing degrees of intentionality and focus.

The Equity Continuum situates an organization within three broad categories ("we must do better"; "equity is a top priority"; "equity is our work/highest priority"). These are the 3 columns evident in the figure above. A *self-assessment* can be initiated to approximate where an organization might "fall" as a whole. The left side of the graphic describes 8 key organization dimensions. PEG argues that it is helpful to consider how an organization is addressing equity within and across most, if not all, of these dimensions. Finally, the continuum can be used iteratively and repeatedly, so that progress can be considered for the organization as a whole, and on each dimension.

While we think every organization should consider how it can best advance racial and economic equity, we don't believe that every organization must become "equity-focused." There is neither a single equity destination nor a universal solution. Rather, we believe that organizations should be intentional about understanding and articulating why and to what extent equity is important to mission advancement and fulfillment, and intentional about mapping a plan to become as equity-focused as is necessary to the organization's unique context.

PEG believes that increasing organizational focus on equity is an iterative journey - a journey that likely takes years, with a unique and perhaps elusive "destination." As there is no single destination, there is likewise no single starting point. As a result, **equity and strategy work are iterative and require constant work** regardless of the stage you are in or the destination you have in mind.


Equity/strategy work is iterative
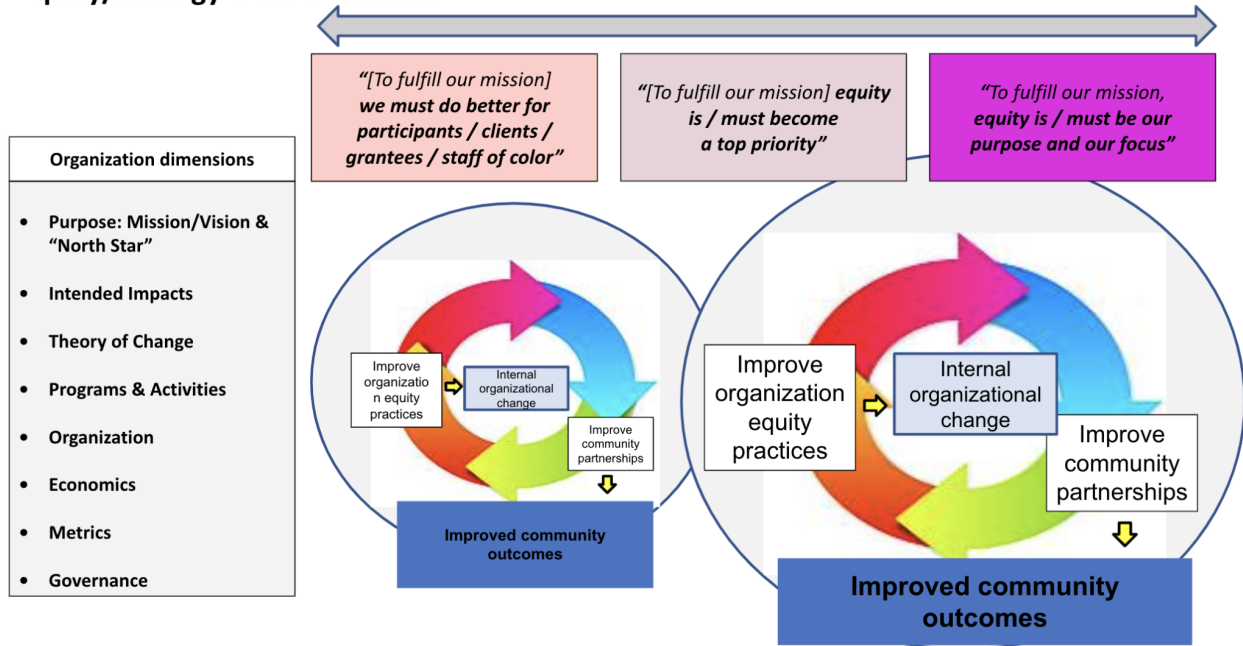
Some sector leaders argue that an organization's efforts to improve their equity focus should start internally (e.g., engaging boards, leaders, and staff about the organization's own practices). Other leaders argue the work should start externally (e.g., listening to and learning from community partners). PEG believes this is a false dichotomy. **There is no universally "right" starting point, and both internal and external work are required**. More important is intentionality about where and how the work begins, as part of a much longer, holistic, iterative,

often challenging and time-consuming journey comprised of successes, failures, and lessons learned, followed by more progress.

Given that such work is important to do well, and can be challenging and time consuming, it can be helpful to consider organizational (and especially) leadership readiness for change, e.g., along the lines of the "readiness for change" dimensions (borrowed from a behavior change model developed by Prochaska and DiClemente in the late 1970s).

The visual below might help an organization assess readiness for a subsequent phase of its equity journey and/or determine readiness to deepen key aspects of ongoing equity work:
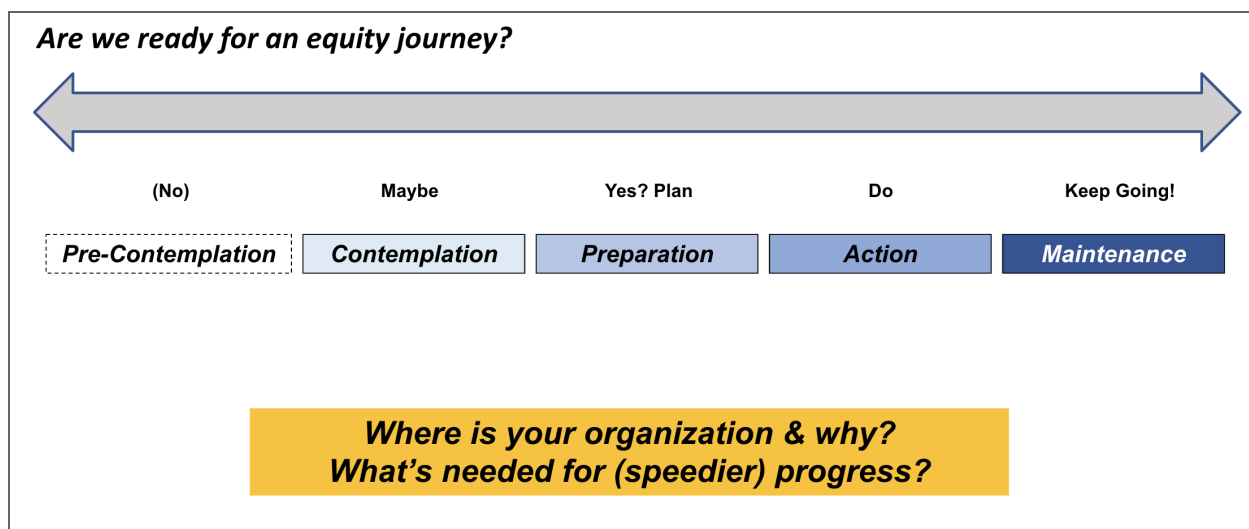
Equity Continuum for Community Foundations

In 2018, PEG worked with PolicyLink and CFLeads to develop a custom version of the Equity Continuum for a national network of community foundations focused on racial equity. To date, the Community Foundation Equity Continuum has been used by 2 cohorts of community foundations as part of CFLeads' multi-year leadership development initiative. The visual below illustrates the overarching frame used to support those cohorts of foundations in working with PEG to better understand their equity journey and how to align the work needed to advance it.

Community Foundation Equity Continuum (draft)

		Equity is a Priority	Equity is a Top Priority	Equity is Our Highest Priority
Mission & vision (also: values & culture)	*Organization values & culture: Stories, symbols, rituals & routines, power structures, organization structure, controls*	• *"[To fulfill our mission] we must do better for constituents of color"*	• *"[To fulfill our mission] equity is/must become a top priority"*	• *"[To fulfill our mission] equity is/must be our purpose and our focus"*
Leadership & governance (Senior staff & board composition, orientation, commitment, accountability)		• Strong individual leaders seek equity focus for the institution • Commitment to build a pipeline of senior staff & board of color	• Growing individual & executive team focus on equity strategy • Aggressive recruitment of diverse, representative, culturally competent senior staff & leadership	• Leaders & board partner to drive equity focus, mandates, partnerships & results • Radically diverse, inclusive, representative, culturally competent senior staff & board
Program strategy (e.g., resident/community engagement, work across sectors, commissioning & sharing data, shaping policy & systems change, marshalling resources; equitable eval & learning)		• Community relationships forming; strategy informed by community input • Research commissioned to capture community perspectives, disaggregate data, surface inequities, root causes & growth opportunities • Partnerships with diverse, equity-focused grantees working @ program & systems levels	• Deep, ongoing community & cross-sector engagement; deepening partnerships • Emerging equity strategies refined, co-developed with community partners; ongoing community feedback, data review • Increasing funder role in community leadership & systems change; marshalling add'l (corp, gov't) resources	• Comprehensive, collaborative (cross-sector) strategy drives equity focus, results • Deep resident, community & advocate partnership on equity agenda; significant policy & systems change focus • Equitable evaluation & strategy integrated; drive learning, improvements, results • Progress, results, lessons shared publicly for accountability
Donor engagement		• Donor education, engagement on equity priorities, power dynamics • Donor introductions to grantees, other community partners	• Donor alignment, co-investment on equity priorities; donors & community partners aspire to equitable partnerships • Cultivation of more diverse donor partners, especially young donors of color	• Deep community, donor & foundation co-investment, partnership on shared equity agenda; active conversation, renegotiation of power imbalances
Communications & marketing		• Commitment to understanding, advancing equity narratives, via strategic communications & marketing	• Testing, deploying equity frames & narratives • Multilingual, multicultural content, channels to reach diverse audiences	• Equity-focused narrative, strategic comms & marketing • Transparent & accountable sharing of strategy, approaches; progress/results, lessons learned
HR, operations & finance (e.g., HR, IT, facilities, supply chain; investment & financial management)		• Commitment to advancing equity via HR (especially talent management), operations & finance policies, practices	• Equity priorities reflected in HR, operations, finance policies, practices • Emerging PRI investments, supplier diversity policies advance equity	• Strong staff/HR results, e.g., performance, retention, advancement, satisfaction • "Community oriented" facilities • Major PRI investments, portfolio investments expand capital access, advance equity agenda

This Community Foundation Equity Continuum illustrates how an organization might consider its starting point on the equity journey (by situating within the 3 main columns). The Foundation can then assess how it is faring along each organization dimension (row).

In section 1a, below, are guiding questions and illustrative tools for community foundations and their stakeholders to engage with each of the organization dimensions that are part of the Equity Continuum. Repeatedly, over time, the community foundation can assess its progress on each of the dimensions and how that work is moving the organization as a whole on their equity journey.

Lastly, the planning template below provides a way to help community foundations and other organizations determine their own unique starting point and destination for each of the organizational dimensions highlighted in the continuum.

Community Foundation Equity Continuum: Planning Template

	Where are we today?	*What is our unique, ideal "desired state"?*
Mission & vision (also: values & culture)		
Leadership & governance (Senior staff & board composition, orientation, commitment, accountability)		
Program strategy (e.g., resident/community engagement, work across sectors, commissioning & sharing data, shaping policy & systems change, marshalling resources; equitable eval & learning)		
Donor engagement		
Communications & marketing		
HR, operations & finance (e.g., HR, IT, facilities, supply chain; investment & financial management)		

Taken together, we hope the frameworks outlined above can support conversations, reflections and planning for an equity journey, while keeping a few, key considerations in mind: equity is a journey; there is no single starting point nor final destination; the work is holistic; and the process is iterative.

The section below highlights a few questions that might arise for (philanthropic) organizations as they seek to explore and advance their equity focus across the key organizational dimensions we've noted above, and highlights potential resources to support those efforts.

Equity Continuum: Foundation Tools (illustrative)

As organizations advance their equity work, they often seek tools to help look across and "within" key organization dimensions, e.g., purpose (vision & mission), leadership & governance, intended impacts and theory of change, programmatic strategy, operations and finance. The iterative nature of an equity journey generally compels organizations to assess and reassess progress across multiple of these dimensions, to ensure that the organization as a whole remains more-or-less in sync.

Listed below are guiding questions and illustrative tools for philanthropic and other organizations and their stakeholders to engage with each of the organization dimensions that are part of the Equity Continuum.

- **Purpose: Vision & Mission**
  - How is a commitment to racial equity reflected in our mission, vision and goals?
    - GARE: Racial Equity Action Plans - A How-to Manual
      - Racial Equity Action Plans can put a theory of change into action to achieve a collective vision of racial equity. While intended for local governments, REA Plans can drive institutional and structural change in any organization. Racial Equity Plans are both a process and a product. A successful process will build staff capacity which can be valuable during implementation. A process can also serve to familiarize more staff with the jurisdiction's racial equity vision and its theory of change.
- **Governance**
  - How do we hold ourselves accountable to the equity goals and intended impacts that we have set out for ourselves? How are leaders in our organization accountable to the organization as a whole?
    - Diversity in Governance: A Toolkit for Inclusion on Nonprofit Boards
      - The Maytree Foundation has created toolkit with a step-by-step process for increasing board diversity and inclusion, such as: articulating a Board diversity policy; establishing a baseline and tracking progress; establishing a transparent recruitment process with orientation and ongoing training; and supporting diverse Board members
- **Intended Impacts & Theory of Change**
  - What might racial equity look like in the arenas where we work?
  - How could a racial equity lens strengthen our own understanding of the problems we're trying to address? How are we considering whether and why there are racial disparities in the arenas where we work - and ensuring that our strategies target the "right" causes and solutions?
    - Constructing a Racial Equity Theory of Change
      - A guide from the Aspen Institute outlining five steps to build a Racial Equity TOC: 1. Define what you want (goal setting); 2. Set your priorities - building blocks; 3. Identify policies, practices - supports/barriers; 4. Map the local landscape; 5. Assess your capacity, plan, and gear up for action. Includes background, workbook, exercises, case study
- **Programs & Activities**

- ○ Where does our organization "sit" on the continuum and why? What are the potential implications for the next steps on our collective equity journey and the programs and activities that will get us there?
  - ■ [Operationalizing Equity: Putting the Annie E. Casey Foundation's Racial and Ethnic Equity and Inclusion Framework Into Action](#)
    - ● This report, a product of the Annie E. Casey Foundation's decades-long journey to promote race equity and inclusion, outlines the challenges and breakthroughs that the Casey Foundation has experienced can help other funders and grantmaking organizations as they seek to embed the values of equity into their programming and operations.
- ● **Talent & Operations Management**
  - ○ Talent management: How diverse is our own staff? Our leadership and board? Do we have criteria and policies in place to assess the racial and ethnic diversity of grantees, partners and other stakeholders?
    - ■ [Diversity, Equity and Inclusion Audit Report from The California Endowment](#)
      - ● This summary report provides a snapshot of the Endowment's staff, Board and grantees; examines the institutional supports underlying the advancement of DEI goals and assesses progress made toward 13 specific DEI goals. In so doing, it models how any organization can engage a similar approach for its own teams
  - ○ Suppliers & economic empowerment: How can our organizations work with a wide array of community partners and "suppliers", across nearly every functional area within the organization (e.g., direct community programs, HR, finance, investment management, administration)? How can our departments assess their functions to see where it might make sense to partner with a minority-owned business or otherwise reinforce the organization's REI commitment?
    - ■ [Building on a Better Foundation: A Toolkit for Creating an Inclusive Grantmaking Organization](#) outlines the following "action steps for organizations as economic entities" among others:
      - ● Support businesses owned by women, POCs, and other traditionally bypassed groups
      - ● Initiate discussion of the organization's investment portfolio among board members and work to develop a policy on socially

responsible investment (i.e., screening out companies that pollute or don't have ethical employment practices)
- Seek out an investment manager experienced in socially responsible investing
- Discuss with board and staff the pros and cons of diverse vendors or investments
- Set goals of adding new vendors yearly from diverse communities served by your organization
- Contact chambers of commerce representing diverse communities and use their member directories to identify potential vendors

■ Other examples include:
- Events: MBE event planners, caterers; event sites, accommodations in disadvantaged communities
- Communications: Culturally competent communications consultants/firms and partners; multilingual collateral; MBE printers (note: union printers are common, and often stamp collateral with a union "bug")
- Finance: Banking (community banks, credit unions); socially responsible investments and diverse portfolio managers
- HR & administration: MBE search firms; ad placements in diverse publications (also, affirmative action hiring policies); MBE consultants

Relevant PEG client examples (illustrative)

In this section we will provide insights, lessons learned and watchouts from organizations that have undertaken significant equity-focused work.

- **The San Francisco Foundation**
  - [The San Francisco Foundation: Advancing Equity…How We Created Our Equity Agenda](#)
  - [The San Francisco Foundation: Advancing Equity: Reimagining the Ways a Community Foundation Delivers on Its Mission](#)
  - [The Stanford Social Innovation Review: Listening To The Community To Reimagine How A Foundation Delivers On Its Mission](#)

- **The Greater Milwaukee Foundation**
  - [Community Leadership | Philanthropy](#)
  - Program areas:
    - [Thriving Communities](#)
    - [Connected People](#)
    - [Early Childhood Education](#)