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RACIAL EQUITY TOOLKIT

A Reflection and Resource Guide for Collective Impact Backbone Staff and Partners

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About the Authors

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Dominique Samari is an experienced attorney, strategist, coach, and facilitator. In 2011, Samari cofounded **P3 Development Group**, where she leads strategy, planning, and training efforts for organizations seeking to drive equitable and inclusive change. Dominique created and recently launched **Kin Universe**, a technology platform that helps individuals and organizations build social capital, increase trust, and strengthen connections across differences. Samari is also a teacher at the **Hoffman Institute**, where she supports individuals in learning how to transform the counterproductive patterns limiting their lives. Samari began her career as a criminal defense attorney and a criminal court commissioner. She transitioned from the practice of law to international development, serving in key management positions for the U.S. Department of State's Rule of Law Program in Afghanistan. Samari is a speaker in the U.S. Department of State U.S. Speaker Program. She received her Juris Doctorate from Marquette University Law School and is the recipient of various awards.

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Paul Schmitz builds the collective leadership of organizations and communities to achieve greater social impact through his roles as senior advisor at the Collective Impact Forum and CEO of **Leading Inside Out**. He is also the author of **Everyone Leads: Building Leadership from the Community Up** and the former CEO of Public Allies, where he helped more than 5,000 diverse young adults begin careers working for community and social change. Paul is a faculty member of the Asset-Based Community Development Institute, was a social innovation advisor to the Obama White House, and has been named three separate years to *The Nonprofit Times* list of the 50 most influential nonprofit leaders in America. He lives in Milwaukee, Wisconsin, with his wife and five children. Learn more at **www.leadinginsideout.org** and **www.collectiveimpactforum.org/users/paulschmitz**.

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Introduction

This toolkit is a companion to the article **Centering Equity in Collective Impact** by Sheri Brady, Jennifer Splansky Juster, John Kania, Mark Kramer, Paul Schmitz, and Junious Williams from the Winter 2022 *Stanford Social Innovation Review*.

The article defines equity as fairness and justice achieved through systematically assessing disparities in opportunities, outcomes, and representation and redressing those disparities through targeted actions. In order to center equity, and specifically racial equity, in collective impact, the authors focused on five action-oriented strategies:

1. Ground the work in data and context, and target solutions.
2. Focus on systems change, in addition to programs and services.
3. Shift power within the collective.
4. Listen to and act with community.
5. Build equity leadership and accountability.

This toolkit offers tips and activities to help collective impact backbone staff and partners operationalize racial equity through each of these strategies. We encourage this toolkit to be used by a team because the conversations and learning are a key part of the racial equity work. Before diving into the strategies, though, it is important to begin considering your personal experience, commitment, and approach to racial equity.

How to Use This Toolkit

Look for this icon to signal journaling time.

This toolkit is meant to be used for personal reflection and team conversation. Race has a direct impact on how people experience the world. Therefore, individual equity journeys will differ based on how a person has experienced race and racism in their life. The reflective work, especially in this first section, may be approached differently by white people and people of color:

- **For white people**, this tool will invite you to reflect on your journey toward consciousness and action to dismantle racism and contribute to racial equity.

- **For people of color**, we invite you to reflect on how racism has impacted you, and how it informs how you show up and approach this work.

Our hope is that individual work in the first section will begin with individual reflection and then lead to conversation and inquiry among your team. **Keep a notebook handy to record your reflections.**

This toolkit is not exhaustive, but it is a series of concepts, practices, and tools that we believe can help teams, organizations, and collective impact initiatives better center racial equity in their work. You can approach this toolkit in two ways:

1. Working through the complete toolkit: We anticipate that a team completing this toolkit will need two or three meetings totaling 12 hours to work through it. We suggest that people do the first section of individual reflections as homework before the first meeting and then work collaboratively on the other tools. The last tools on Accountable Leadership can also be completed as homework before the final meeting.

2. Using the individual tools and worksheets: Groups can use individual tools for team building, planning, and problem-solving. For example, teams might share equity journey maps to build relationships and conversations, use the section on Targeted Universalism or Systems Change to assess their common agenda, or use the section on Shifting Power to address power dynamics they've noticed in their group.

Taking care of ourselves and each other

This is difficult work and can lead to difficult conversations. This is why it is important to look within first, to clarify our own experiences, motives, patterns, and commitments. It is also a journey, and the goal is for everyone to move forward and, importantly, to move more equitable community outcomes forward. We need to enter these conversations with empathy and seek to understand people's experiences and perceptions from their life experiences. It is also important to agree on shared goals and ground rules, and to meet people where they are in their journeys.

We must also take care of ourselves. Individuals may be triggered by conversations. People may have past trauma that surfaces in this work. Consider whether your group would benefit from having a third-party facilitator. Make sure there are breaks in the agenda (when we facilitate workshops, we like to give people at least 15 minutes after each 90- to 120-minute segment) and call a break or check in with people if the conversation gets heated or if someone seems withdrawn or checked out. Again, this work often requires difficult conversations and discomfort, but by working through them, we can find ourselves individually and collectively in a much better place.

Why Racial Equity?

In this toolkit, we focus on racial equity, as people of color are often the most structurally, institutionally, and interpersonally marginalized in the United States and many other countries.

We believe, however, that focusing on racial equity also enables us to introduce tools and resources that may be applied or adapted to other areas of marginalization or disparity in our communities and society, including:

- **disability**
- **sexual orientation**
- **gender**
- **class**
- **caste**
- **ethnicity**
- **religion**
- **and more**

Doing this work in an era of greater division

There is currently a backlash in the United States over the concept of "critical race theory," which often includes ideas or training related to racial equity and to learning or, often, relearning parts of our history. We approach this work grounded in factual data and factual history that demonstrate that the legacy of white supremacy and racism has produced systems and structures that have resulted in the racial inequities we have today. We cannot chart a course forward successfully if we do not share an understanding of the past that has led us to the present challenges we are working to solve.

Our communities and society will not move the needle on our toughest issues if our solutions do not center equity. If different subgroups in our community all achieve great outcomes, we all benefit, and we cannot get there without addressing the systems and structures that hold inequity in place.

With that said, we must create bridges that meet people where they are and create on-ramps to this journey and work. We find that sharing factual data, learning from lived experience, learning from others' racial equity journeys, and adapting language to help people understand concepts can support that bridging.

Looking Inward: Racial Equity Begins Within

You cannot do racial equity without turning inward first. Practicing racial equity requires a journey of exploration, learning, and evolving that does not end. There is no box to check off. To do this work well, you have to commit to your authentic journey. What does practicing racial equity mean to you, what is your commitment to it, and how does your everyday life reflect your commitment to it? This also requires commitment to antiracist work—actively working to interrupt, dismantle, and redress behaviors, interpersonal dynamics, structures, and systems that produce racial inequities. It requires action. Spending substantial time on an internal focus is critical before delving into the work of centering racial equity in our organizations, projects, collaboratives, or communities.

This first section offers four activities to explore our personal experience and commitment:

1. **My Equity Journey:** What has been my personal journey on racial equity? What experiences, people, and lessons have been key to my journey?
2. **Historical Forces:** What historical forces have impacted the opportunities that I have had? How have those forces shaped my community and work?
3. **Behavior Patterns and Implicit Bias:** What patterns of behavior and thought do I exhibit that could be impeding my work on racial equity?
4. **My Network:** What communities do I belong to? Where do I get exposed to different experiences, perspectives, and relationships?

To begin, reflect on and answer the following questions:

How do I racially or ethnically identify? What has been my experience with my racial identity?

What narratives do I have about my own race and about other races? Where do those stories come from?

What types of conversations or experiences around race and racial equity am I having in my family, organization, and community? How do these conversations affect me?

1. My Equity Journey

Creating Your Journey Map

On the timeline below (or in your journal), please highlight 5 – 10 key milestones in your journey to date—life experiences (including experiences of discrimination or otherness), family members, mentors, teachers, books, friends, artworks, etc.—that have inspired, influenced, or otherwise shaped your understanding and commitment to racial equity.

Present

Birth
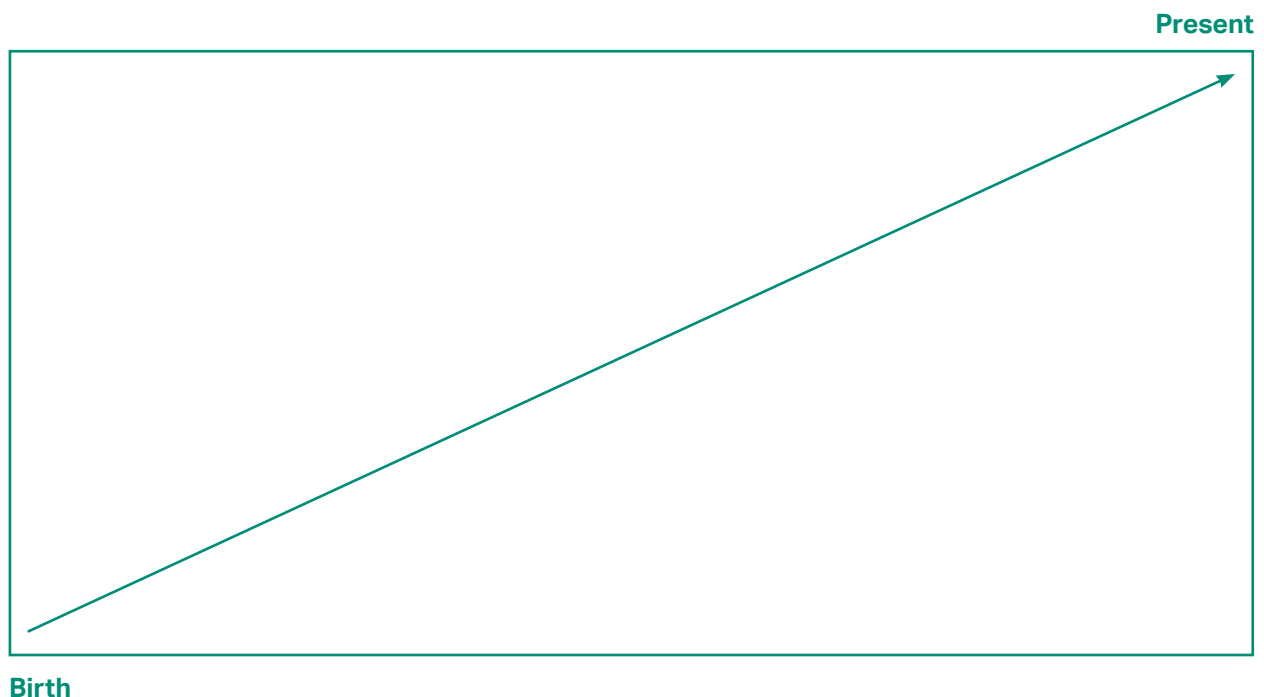
2. Historical Forces Shaping Us and Our Communities: For White Allies

We often talk about racism in terms of attitudes and behaviors. It is important to also consider how systems and structures have produced the racially disparate conditions and outcomes we have in our communities. In *How to Be an Antiracist*, Ibram X. Kendi defines a racist policy or practice as one that produces racially disparate outcomes, regardless of intent. It is important to understand and acknowledge how these policies and systems have affected us as well as the communities we work in.

Toolkit coauthor Paul Schmitz shares the following as an example:

I know that my ancestors came to America from Germany and Ireland in the 19th century, when Europeans could freely immigrate and, after five years of residence, become U.S. citizens. The major immigration acts, including the Naturalization Act of 1790, the Chinese Exclusion Act of 1880, and the Immigration Law of 1924, specifically sought to promote white supremacy and prevented most people of color from immigrating or becoming citizens until after 1965.

My ancestors likely received land through the Homestead Act of 1862, which made land— stolen from Native Americans by genocidal policies and broken treaties—available for Europeans for settlement and farming. Forty-five million Americans today are descendants of people who received Homestead land grants. Less than 2% of Homestead Act land went to African Americans, and 90% of that land (valued at $300 billion) was lost during the 20th century due to racist practices of the U.S. Department of Agriculture.

My father served in World War II, making him eligible for the GI Bill benefits that supported college education and new home purchases. African Americans were segregated out of most universities that accepted GI Bill benefits and also could not obtain home loans except in the most disadvantaged neighborhoods. The GI Bill followed the New Deal's Federal Housing Administration, which made it much easier and cheaper to buy a home but denied loans to African Americans and redlined neighborhoods to limit loans to African Americans and enforce segregation. Ninety-eight percent of the benefit went to whites. Home ownership has been a key driver of the wealth gap between African Americans and whites.

Because of these loans, policies, and federal highway construction, my family was able to move in 1965 to a new home in a suburb of Milwaukee, where the excellent public schools spent more than double what city schools spent per student and expected all students to be college-bound. Among the benefits of being in the suburbs was a very different relationship with police, whether it was getting warnings for speeding or being given the benefit of the doubt and let go by police when I was guilty of a crime.

These are just a few of the policies and systems that advantaged the mobility of families like mine while also creating structural disadvantage for people of color and others marginalized in my community. This is in addition to the daily privileges of seeing my culture reflected as the norm in institutions and the media, as well as not experiencing microaggression or discrimination at school, in the workplace, at shops, or in our cars.

We invite white allies to reflect on your own family history and the history of the community and populations with whom you work:

1. Consider your own background; how have these and other policies or systems affected your and your family's opportunities across generations?

2. What are other examples of how you have benefitted from white privilege? (For examples of this, see White Privilege: Unpacking the Invisible Knapsack, by Peggy McIntosh, or What Is White Privilege, Really?, by Cory Collins.

3. How have these same forces shaped the populations, neighborhoods, and issues you are focused on through your collective impact work?

4. Share your answers with people of color on your team and ask them to share some of their experiences and how they see the role of historical policies and systems in shaping their lives and the work you are doing.

Some resources for reading about and exploring the history of racism in United States policies and systems:

- *Asian American Histories of the United States*, by Catherine Ceniza Choy
- *The Color of Law*, by Richard Rothstein
- *Harvest of Empire: A History of Latinos in America*, by Juan Gonzalez
- *The Heartbeat of Wounded Knee*, by David Treuer
- *An Indigenous Peoples' History of the United States*, by Roxanne Dunbar-Ortiz
- *The New Jim Crow*, by Michelle Alexander
- *The 1619 Project*, edited by Nikole Hannah-Jones
- *Stamped from the Beginning*, by Ibram X. Kendi
- *Stony the Road*, by Henry Louis Gates, Jr.
- *These Truths: A History of the United States*, by Jill Lepore

3. Behavior Patterns and Implicit Bias

Patterns are thoughts and learned behaviors that are automatic and reactive. For example, we might have a pattern of stubbornness that leads us to dig in or debate people in ways that shut others down, even when we don't mean to do so. Many patterns prevent us from showing up as our best and most authentic selves, and some patterns are specifically related to race, discrimination, and bias learned and reinforced by pervasive beliefs and attitudes in society.
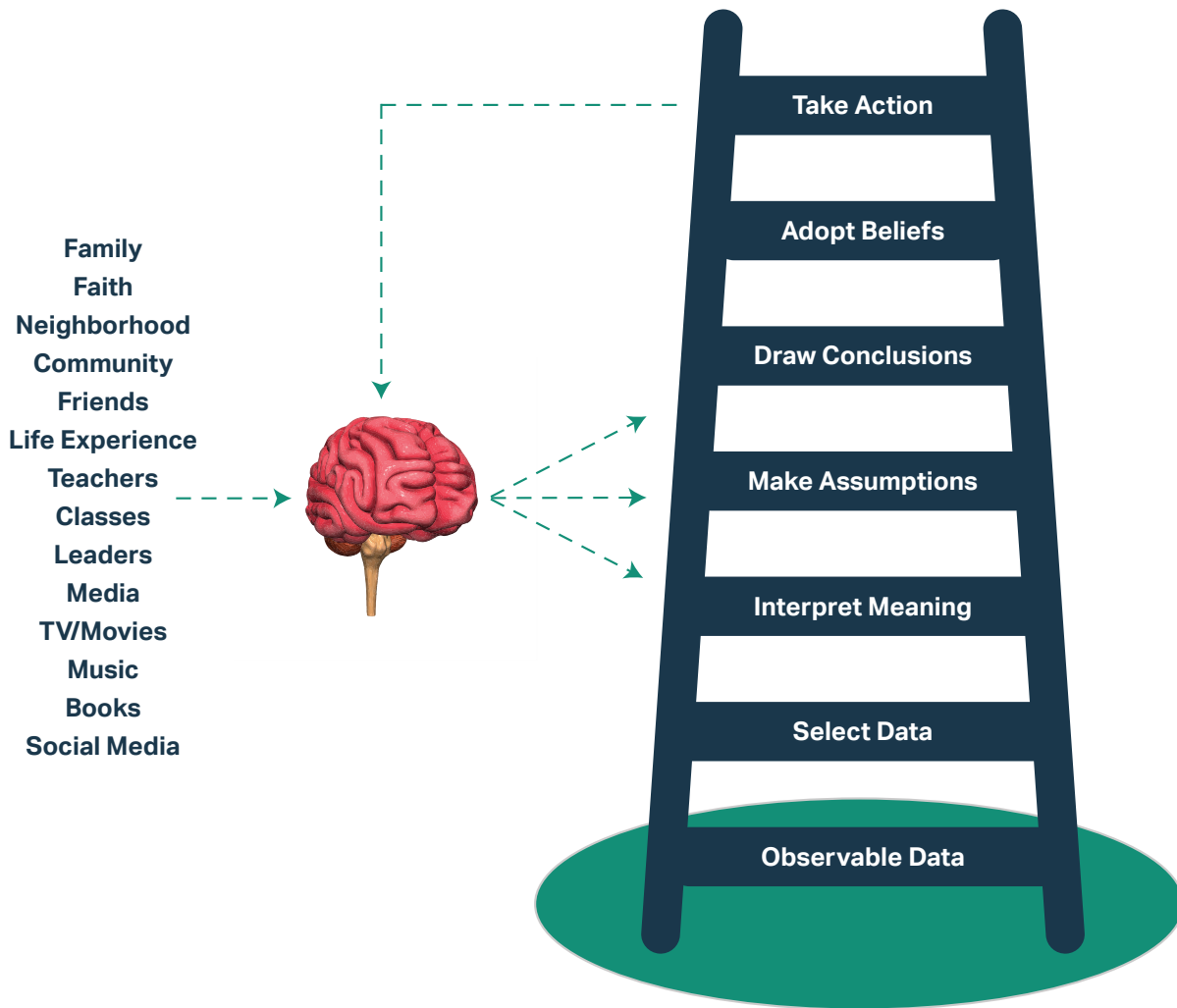
In *Biased: Uncovering the Hidden Prejudice That Shapes What We See, Think, and Do*, Stanford Professor Jennifer Eberhardt defines **implicit bias** as a distorting lens that is a product of both the architecture of our brains and the disparities in our society. Our brains are in part categorization machines that allow us to organize and manage the overload of stimulus and information with which we are constantly bombarded. That categorization enables us to make judgments and decisions more efficiently by relying on patterns that seem predictable.

Our families, friends, neighborhoods, culture, and the various media we consume shape these categories and imbue them with meaning and feeling. Our beliefs and attitudes can become so strongly associated with the categories that they are automatically triggered, affecting our behaviors and decision-making. They are implicit because they are unintentional and unconscious, no matter our values or conscious beliefs. Examples include favoring someone in a job interview who went to your college and shared a favorite professor or assuming someone's class or educational background because of their race or ethnicity. They are pervasive and tend to favor those most like us. Everyone has them.

Harvard Professor Chris Argyris's **Ladder of Inference** is a model that describes how our brain translates the data we encounter into beliefs and actions we take. This process happens in a milli-second. In any situation, we experience a large pool of data (sensory stimulus, information). Our life experience shapes the categorization in our brain and our implicit biases, which inform which data we notice and pay attention to, how we interpret that data, the assumptions we make, and, ultimately, our beliefs, actions, and patterns. See Figure 1.

The Ladder of Inference reminds us why it is so important to test our observations, interpretations, and assumptions. This is especially true if they are about people or communities that are not our own. We need to check in with people different from us before drawing conclusions. And we must be aware that we have implicit biases and patterns that shape our beliefs and actions.

Figure 1. Ladder of Inference

Family
Faith
Neighborhood
Community
Friends
Life Experience
Teachers
Classes
Leaders
Media
TV/Movies
Music
Books
Social Media

Take Action

Adopt Beliefs

Draw Conclusions

Make Assumptions

Interpret Meaning

Select Data

Observable Data

Describe a recent experience when you "ran up your ladder" on a person or people outside of your race and/or culture and then discovered you were wrong. What implicit biases may have been involved? How could you have tested your thinking before jumping to conclusions?

Patterns

Some of our patterns relate to race and racism. We all have patterns, and awareness of them can help us better understand how we are showing up in our lives and work and the impact of our subconscious beliefs and behaviors. Awareness can also help us avoid or even stop the patterns when we notice we are doing them.

The following list of patterns is not exhaustive, but it provides examples that can prevent us from successfully supporting and advancing racial equity, even if our intentions are otherwise. Check all the patterns below with which you identify. Choose the five patterns from those you checked that show up for you most often, circle them, and answer the questions on the next page.

Discrimination and Bias Patterns

1. Perceive self as free of biases and prejudices

2. Avoid conversations about difference

3. Feel shameful about having prejudices

4. Ignore or minimize racial differences (e.g., "We're all the same" or "I'm colorblind")

5. My intent matters most ("If I didn't mean any harm, then my behavior is okay regardless of its impact on someone else.")

6. Homogenizing other races (not acknowledging the diversity and complexity within racial groups)

7. Self-righteous about racial equity work and knowledge

8. Judge others who you do not perceive as committed to racial equity

9. Diffuse or reject responsibility for working on racial equity ("It is not my problem.")

10. Believe our way of doing things is the right way and others' approaches are less valid; they should adapt to our way

11. Not speaking up or intervening when witnessing racist behaviors, including microaggressions

12. Minimize others' experience of prejudice or bias ("Are you sure that happened? They probably didn't mean it.")

13. Deferring to white people for advice, guidance, or expertise

14. Decide people's interests or skill sets based on their group (assuming an African American volunteer will be more interested in community services than the business side of an organization)

15. Shame or negative view of one's own race or ethnicity

16. Minimize or invalidate one's own experiences of prejudice or bias ("It's not that bad; others have it worse.")

17. Blame oneself for being targeted by racism

18. Shame for looking different or desiring to fit in with status quo of dominant groups, culture

19. Feeling the need to always prove you belong (overcompensating by emphasizing credentials, not asking for assistance)

20. Comparing your underrepresented group against others; minimizing or competing with other underrepresented groups

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For the five patterns you circled, please answer the following questions:

- How does this pattern show up in my life? How does it show up in my racial equity work?
- How does this pattern impede me? How does it impede my work with others?

Pattern 1:

Pattern 2:

Pattern 3:

Pattern 4:

Pattern 5:

4. My Network

It is important in our work on racial equity to be aware of our own network: whom we listen to, who influences us, whom we partner with, and with who we discuss important personal and community issues and solutions.

Please think of the people you most often seek professional and/or personal advice and counsel from and check the boxes to recognize how they may differ from you:

Who are the people you go to for advice and counsel most often?	Different Race/ Ethnicity	Different Gender	Disabled/ Chronic Illness	Age +/- 10 Years	Different Sexual Orientation	Different Position/ Economic Status

Among your core network, what percentage of people are:

_____ Different race/ethnicity   _____ Older or younger than you by 10 years or more

_____ Different gender   _____ Different sexual orientation

_____ Disabled or chronically ill   _____ Different position and/or economic status

How would you rate the diversity of your core network? Do the people you most often speak to give you access to diverse perspectives?

Are there relationships you could build that would help you broaden your network and offer perspectives you don't access enough now? If your network isn't diverse, why do you think that is?

What other networks or groups are you a member of? Which of those are most racially diverse or offer you access to the most diverse perspectives?

Team Reflections

After each individual has completed the four parts of the Looking Inward tools, we suggest that each member answer and share the following with their teammates. (Pairs or teams may walk through all of the activities one by one with each other as well.)

Please share at least two top insights or "ahas" from each activity:

- Journey Map
- Historical Forces
- Behavior Patterns and Implicit Bias
- My Network

Based on these insights, what are at least three concrete action commitments you could make to advance your racial equity understanding and work individually? For example:

- *What is the next step of learning or action on your journey map?*
- *How can you learn more about or use knowledge of historical forces to acknowledge privilege, speak up, take stands, or educate others?*
- *Which patterns can you work on changing? How can others help you recognize when they show up and hold you accountable?*
- *What steps could you take to broaden your network?*

How will you be accountable for these action commitments?

Before moving to the next section, please enter action commitments on page 31.

Strategy 1: Ground the Work in Data and Context, and Target Solutions

Grounding the work in appropriate data and context requires that participants in collective impact initiatives develop a new and shared understanding of terminology, history, data, and personal stories.

Definitions

We define **equity** as fairness and justice achieved through systematically assessing disparities in opportunities, outcomes, and participation, and redressing those disparities through targeted actions (adapted from Urban Strategies Council). It is important for you to have conversations about your definition of racial equity and what it means in practice for your collaborative. The process and conversations will build relationships and gauge how people are understanding and reacting to this work. *Some collective impact initiatives have developed criteria, questions, values, and/or principles based on their definition that they review before decisions to ensure they are keeping racial equity central to their initiatives.*

Approaching Strategy with Targeted Universalism

Collective impact initiatives forming or refining their common agenda strategies should begin by implementing **targeted universalism**, an approach created by john a. powell of University of California–Berkeley's Othering and Belonging Institute. This approach has four steps:

1. Define a universal goal, such as increasing grade level reading or decreasing teen pregnancy for a defined population (city, county, neighborhood, school district).

    Have you specifically defined your population level goals or results? If so, what percentage of the overall population is currently meeting that goal or result? Do you have a target goal you are working to reach through your efforts?

2. When looking at data relative to the universal goal, disaggregate data to explore how different population segments or subgroups are faring relative to your goal.

    Have you disaggregated data to consider how different population segments are doing relative to your goal? Which categories of population segments have you explored (e.g., race, gender, disability, sexual orientation, immigration status, ZIP code)? Which population segments experience disparities?

3. Identify the structures and factors that support or impede specific population segments' needs and circumstances.

   For those population segments experiencing disparities, what are the structures, systems, historical forces, and other barriers that impede their progress? How have you identified them? What research, conversations, and community engagement have helped you identify and validate them? What strategies will specifically support the population segments experiencing disparities, and how have they been engaged in developing those strategies?

4. Implement targeted strategies that help each group achieve the universal goal based on their needs and circumstances.

   How will you target strategies to ensure those population segments experiencing disparities, especially racial disparities, will be approached in ways that take into account their unique needs and circumstances? How have leaders or those with lived experience from those population segments informed your strategies?

Approaching Data in an Asset-Based, Community-Informed Way

It is important when analyzing data about an issue, population segments, or communities to contextualize that data. Too often, we forget that data is information about people's lives, and it is important to interpret and analyze it through the lens of those who the data represents.

There are two approaches that can help us do this better and support our work in racial equity:

1. **Asset-Based Framing.** Too often, we see communities and groups, particularly people of color, defined, labeled, and homogenized by negative data, ignoring positive outcomes and trends. For example, a neighborhood where 30% of children drop out of high school will be characterized by the dropouts instead of by the 70% who graduate. It is important not to define people or neighborhoods solely by their problems and deficits. It leads us to ignore neighborhood assets, patronize residents, and enable "white savior" dynamics where communities are "the problem" and outsiders (typically better funded white-led groups) are needed to fix them.

   Being asset-based does not mean ignoring data about challenges, it is about how we contextualize and frame data about communities in a way that better reflects actual conditions. Imagine if your intended beneficiaries and those most proximate to the issue reviewed your last needs statement from a grant proposal, reviewed how they are described in your marketing materials or website, and listened in on meetings discussing their issues. Would they feel their assets were well reflected in your work? The framing also feeds into engagement; if you don't see, acknowledge, and engage those assets, you send a message that builds distrust and disengagement.

> **How do you frame data about the people and communities you serve? What is the public story you tell? What are some of the community assets you've identified, those individuals, groups, or resources trusted by the community?**
>
> Asset-Based Framing resources:
>
> - **BMe Asset-Framing**
> - **The Asset-Based Community Development Institute (ABCD)**

2. **Community-Informed Data:** It is important to listen to the community (intended beneficiaries or those most proximate to the issue and their families, friends, and neighbors), and especially to hear how community members interpret data about their lives and communities and how they experience those conditions. We have seen collective impact initiatives listen to and engage community in making meaning out of data in several ways:

- Engage frontline community workers to interview the people they serve, perhaps offering some of the conclusions or ideas that are emerging from your interpretation of data.

- Host townhall meetings in person or online (using Facebook or Instagram Live, for example) to share and engage perspectives.

- Hire residents from the community to work on data collection, analysis, and interpretation.

- Partner with a community-based organization to have them work on building their data capacity and work with their staff and residents to collect and interpret data.

- Create a community advisory board or committee with grassroots leaders and voices that can continually provide feedback and engage the feedback of their peers.

- Conduct data galleries (see next page) or focus groups with subgroups of intended beneficiaries or those closest to them convened by key trusted partners, including community organizations, schools, and churches.

> **How do or could you create engagement mechanisms to enhance and/or test your interpretation of data about your issue, population groups, and community?**

Data Galleries

Data galleries (also known as data walks)* are a process that many have used to review data and gather shared meaning from diverse voices, including those with lived experience or closest to those with lived experience. Here are some steps to create an effective data gallery:

1. Create a pool of data that illustrates in graphic ways information and trends, including quotes or stories from those with lived experience. The goal is not to create a research report but to ground people in enough data and information to support effective planning. It is important that data is shared graphically to illustrate the key points in a way that is easy for all to understand.

2. Set up the data gallery: If in person, place data on slides on walls that people will visit. If lots of people, place the same set on more than one wall and have printed copies for those who may have mobility issues. If virtual, place data slides in a Google Slides deck or on Google Jamboard and place people in small breakouts to review together.

3. Assign people to work in pairs or triads, ideally with people they do not know well or who are otherwise different from themselves. They can leave Post-it Notes on the slides (in person or virtually) with questions and feedback. They also should discuss and try to come to consensus on the following questions:

   • What data point did you find most urgent?

   • What data point did you find most hopeful?

   • What data point did you find most surprising?

   • What data or information is missing from this analysis?

4. Create meaning from the data. Combine two or three small groups into bigger groups and share your answers from those questions. Work to gain consensus on the questions together, and then agree on three key themes that should inform the overall group's thinking and planning.

5. All the groups share out their themes, and the themes are captured, organized, and sometimes voted on to identify priorities and support planning and decision-making by the group.

Examples of data galleries/walks:

• **Tamarack Institute**

• **Annie E. Casey Foundation**

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*   We have intentionally renamed our data walks as "data galleries" to be inclusive of people of all mobilities.
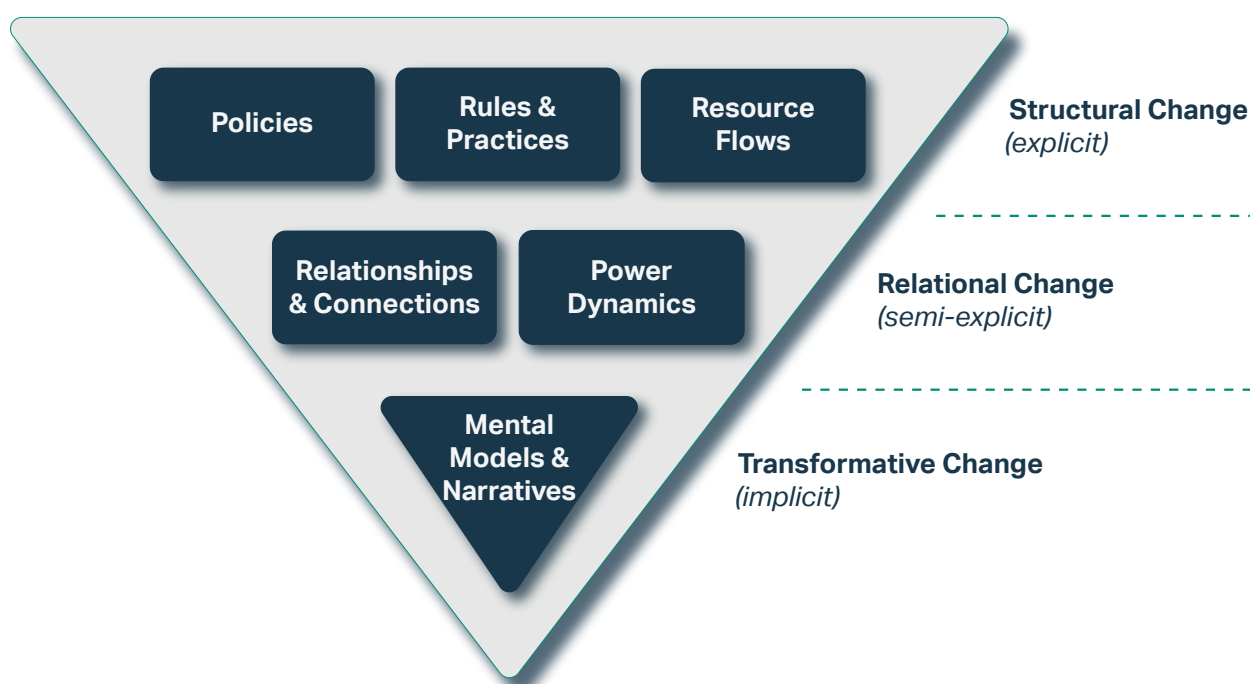
Strategy 2: Focus on Systems Change, in Addition to Programs and Services

Along with implementing programs and services that contribute to your results, it is important to analyze and address systems factors that are necessary to achieving equitable change. *Within programs and services, we should ensure that our partners working in the collaborative have clear commitments to racial equity that are demonstrated by their personnel, approach to community, and outcomes. We should not be engaging partners who do not share or strive for a commitment that matches that of our collaborative overall.*

Analyzing Racial Equity in the Six Conditions of Systems Change

A very simple but useful definition of systems change comes from the Social Innovation Generation (SIG) in Canada: *Shifting the conditions that hold a problem in place* (quoted in **The Water of Systems Change** by Kania, Kramer, and Senge). Many racial disparities are the result of systems that, whether intended or not, produce those disparities. In order to address racial equity in our projects, we must consider which systems require change. See Figure 2.

Figure 2. Systems Change: Changing the Conditions That Hold the Problem in Place

Policies · Rules & Practices · Resource Flows — **Structural Change** *(explicit)*

Relationships & Connections · Power Dynamics — **Relational Change** *(semi-explicit)*

Mental Models & Narratives — **Transformative Change** *(implicit)*

Walking through each of the six conditions of systems change, please identify those that are holding racial inequities in place for the populations and communities you serve.

Mental Models and Narratives

These are deeply held beliefs, stories, and assumptions that influence the actions of individuals, institutions, and systems. *For example, the way the local newspaper covers infant deaths has created a false narrative about causes of infant mortality that support racial stereotypes and are not supported by data.*

- **What racially biased beliefs and/or stereotypes about the individuals or communities impacted are reinforcing these inequities or blocking progress?**

- **Are there beliefs about the issue you are working to address or your approach that block action and progress?**

- **Are there beliefs, biases, or stereotypes within your collective that are preventing action or progress?**

- **Are the mental models and narratives in your collective deficit-based or asset-based about the beneficiaries, their capacities, and their neighborhoods? How do you frame and talk about the people and communities you serve?**

Relationships and Connections

This refers to the quality of connections and communication occurring between actors. It is about how leaders, organizations, and institutions fail to collaborate, instead producing duplication, competition, confusion, and other barriers to people getting efficient and effective help. *For example, legal assistance programs to support people facing evictions lack capacity and don't coordinate with each other, so an individual facing eviction may have to call multiple agencies before they speak to one that can help them. Instead of collaborating to grow the capacity of their field and coordinating to better serve residents, they compete with each other over limited resources that leave people behind.*

- **From the standpoint of the intended beneficiary, are there barriers caused by the lack of coordination or collaboration among agencies?**

- **How well do partners within the system trust each other, especially between people of color-led and white-led partners?**

- **Where does racism or bias show up in how organizations, institutions, and systems work together to address your issue on behalf of community members?**

- **Is the system reflected equitably at your table? Is the diversity of the ecosystem, especially those supports closest relationally to beneficiaries, present at your table?**

Power Dynamics

This refers to who is making or influencing decisions, and how such exercises of power can limit important, relevant ideas, solutions, and partnerships from the community. This also includes structures and strategies the collaborative is using to manage power dynamics to better shift and share power. *For example, after a planning process has established shared priorities among dozens of leaders, organizations, and residents for your collective impact initiative, the mayor and a local philanthropist override the group and inform the backbone staff that they must focus on only one strategy that better serves their interests.*

- **Where does race show up in terms of who has power and voice in decisions within your collective? How equitably are decisions made in terms of perspectives and engagement?**

- **How do those with formal authority (individuals who have control over resources) treat and engage with those with informal authority (individuals who have more trust and credibility in the community)?**

- **Are there structures or agreements your collective has implemented that mitigate power imbalances and enable inclusion? Have those with formal authority continued to participate and abide by those structures and agreements?**

Resource Flows

This refers to how money, people, knowledge, and information are allocated and distributed across the system. *For example, a collaborative agrees on a set of strategies among providers to move the needle on adolescent mental health. The largest health funder in its city subsequently announces a new mental health initiative that will cause partners to diverge from that strategy and compete with each other to get funded.*

- **Where does race show up in terms of who decides on resources and gets resources, and what is expected of recipients?**

- **Are there rules or criteria that public or private grantmakers have in place that prevent people of color-led organizations and/or those that are more grassroots from receiving resources?**

- **Within the coalition, who participates in resource decisions? Are resources spent or granted equitably (e.g., to people of color-led organizations or vendors)?**

Rules and Practices

These are the ways programs, services, and systems operate, the rules and practices that they follow in making decisions, engaging people, setting policies, and delivering services. *For example, a summer recreation league requires parents to sign up in person and is only open for registration from 1:00 – 5:00 p.m. two days a week, which limits the ability of working parents to register their children.*

- Are there rules and practices that contribute to racial inequities in terms of people accessing or benefitting from programs or opportunities?

- Are there rules or practices in the system that prevent collaboration, coordination, or participation in ways that prevent equity?

- Within our coalition, are there practices or policies that make it harder for people to participate, especially people of color and/or grassroots leaders?

Policies

These are what often govern how work is done in our communities by setting priorities, rules, and funding. *For example, the city's zoning policies are preventing multi-unit buildings, thereby restricting affordable housing.*

- Which public policies or regulations are contributing to inequitable results in your community?

- Who created or supported these policies? Who are the leaders or groups that support or benefit from these policies?

* **Priority Commitments:** Which two or three Systems Changes are highest priority to move processes and outcomes more equitably in your community? How will you plan and implement strategies to address these racially inequitable system barriers?

Strategy 3: Shift Power within the Collaborative

Power is defined as "the ability or authority to influence others, to decide who will have access to resources, and to define reality or exercise control over oneself or others" (**Frontline Solutions**). Power exists among those who control institutions, resources, and policies (formal authority), but also among those who have relationships and credibility with groups and communities (informal authority). Our society (and often our collaboratives) values those with formal authority more than those with informal authority, but both are necessary to move results.

Mapping and Analyzing Power at Your Table

Please consider how formal and informal authority are distributed in your Steering Committee and other workgroups or action teams. Name each group in the left column and count how many members are in each of the four categories.

Groups	Formal Authority White	Formal Authority Reflects historically marginalized populations	Informal Authority White	Informal Authority Reflects historically marginalized populations

Analyze Your Table:

• How is power distributed in each group? Where are there imbalances?

• What power dynamics have you seen play out in the group related to those imbalances?

• How does your composition impact decision-making? Do certain voices carry more weight or get dismissed in discussions or final decisions?

Practices That Shift Power

One of the most difficult dynamics we have repeatedly witnessed in collective impact initiatives is the difficulty in creating inclusive and equitable tables that maintain active participation from those with both formal and informal authority. We have especially witnessed that as tables have become more inclusive and power more shared, many with formal authority leave, which reduces the ability of the group to influence resources, institutions, and systems. Effective collaboratives need both.

Building a collective that includes those with formal and informal authority

We believe this begins by agreeing on clear results and strategies for our initiatives and the importance of racial equity to achieving them. If we all agree that we want equitable results in our community, we will all need to work in a new way. We must do things differently if we want different results than we have now. Everyone at the table should make an explicit commitment to racial equity, in both outcomes and participation, and understand how the two are connected.

In order to shift power, you can put structures in places that shift power and/or build a culture that supports the shifting and sharing of power.

Structural ways to share power

Some collective impact initiatives have built-in mechanisms for more equitable sharing of power. These initiatives have acknowledged that there are power differentials and sought to mitigate those differentials so that decision-making is inclusive, equitable, and guided by those closest to the work. Examples include:

- **Weighting community voices:** Create governance boards in which half or more of the members represent and reflect the populations served, especially those experiencing disparities. Some offer more weight to such resident voices, requiring a majority of resident votes as well as a majority of the overall governance table for approval.

- **Resident advisory tables:** Collectives create a resident board made of leaders with lived experience or who are families, friends, and neighbors of the population served. These groups engage the Resident Table as a feedback loop on decisions, requiring their approval of big decisions before they are considered by the Steering Committee.

- **Last word:** Some collectives have granted those on the Steering Committee with lived experience the last word in discussions before votes are taken.

- **Resource decisions:** Funders who are part of the collective make multiyear commitments to the collective impact strategy, with some discretion to the group on how best to use those resources to move the strategy.

Cultural practices that share power

- **Name power imbalances and make an explicit commitment to address them.** Recognize that in order to get more transformative change, you need the voice and credibility that comes from leaders who hold power over resources and public influence, and you need those with community influence. Ask everyone at the table to commit to ground rules that support inclusive and equitable decision-making on behalf of your results. Be vigilant about naming dynamics.

- **Build relationships.** Facilitate activities during meetings that help members get to know each other personally. Create a buddy system to build deeper relationships between those with formal and informal authority. Encourage them to share a meal together, to get to know each other's stories and why they care about this work.

- **Facilitate inclusively to build trust.** Backbone staff and chairs should facilitate meetings inclusively so that all members feel they are heard and treated equally. Communicate continuously and transparently so that there is not a perception that some people are given more information or more weight around decisions.

- **Create space for learning.** Acknowledge that this is difficult work and that there will be tensions and even conflicts to work through. Help members understand that by working through them, we will all learn and be able to achieve more than others have in the past.

- **Engage power moves.** The National Committee for Responsive Philanthropy's Power Moves **framework** is useful for thinking about how those with formal authority can use their power for the benefit of the group and more equitable ends:

  - **Building power:** supporting leadership development, mentoring, and lifting up and amplifying the voice of marginalized populations

  - **Sharing power:** engaging and learning from others' perspectives, testing one's assumptions and biases, supporting group decision-making and consensus

  - **Wielding power:** being willing to use one's power and influence in support of decisions by the group and issues of equity

> **Which structural or cultural practices do you currently use to mitigate imbalances?**
>
>
> **Which structural or cultural practices could you implement to shift more power?**

Strategy 4: Listen and Act with Community

When we speak of listening to and acting with the community, we are referring to the intended beneficiaries of your work and those closest to them (families, friends, neighbors).

Listening to and acting with community requires relationships with community members, an understanding of the community history and context, and knowing who is trusted and viewed as assets by community members. It is important to be aware of biases about who leaders are, what skills or knowledge they have, what organizations or institutions are known and trusted by community members, and what issues and concerns people have. In addition, be aware of "white savior syndrome," when people outside the community come in with ideas for helping and expect gratitude even though they were not invited or engaged by community members to offer help.

We encourage groups that wish to learn about and build a more comprehensive community engagement plan to use The Collective Impact Forum's **Community Engagement Toolkit**. The first section of that toolkit begins with purpose, recognizing that unless you are clear on why community engagement is critical to achieving your intended goals, you will treat it only as something nice to do, not necessary to do.

> **Why is listening to and acting with community important to your work and outcomes? How is it critical to your goals?**

Once you are clear on the purpose, it is important to consider ways to build the knowledge and relationships that will enable you to listen to the community and do work *with* the community, instead of *to* the community. The important word here is "relationship." Trust does not come from one-off meetings or listening sessions; it comes from actively seeking relationships where listening and partnering are a continuous process.

Examples of ways one can listen to the community:

- Host meetings or listening sessions in partnership with community-based organizations, businesses, houses of worship, or community organizers who can convene people who have a stake in your issue.

- Work with local community-based organizations or leaders to host small meetings with people they trust—and, importantly, follow up with them and continue building the relationship.

- Network with people in the community the same way you network with organizational leaders in your collective.

- Find community members' interests and introduce or connect them to leaders or organizations that can support their vision for change.
- Create an advisory board or council with resident leaders or those who represent bases of resident leaders (like houses of worship, neighborhood groups, community organizing groups, and the like).
- Recruit resident leaders for your Steering Committee or workgroups and ensure an inclusive environment where their participation is respected and valued.

Examples of ways one may act with community:

- An infant mortality initiative hires community organizers who engage women of childbearing age to share information on safe pregnancy and birth outcomes with their peers.
- A rural mental health initiative works with seed dealers, mechanics, and others who work closely with farmers and trains them in mental health first aid so they may help farmers they know who are experiencing depression.
- A reading initiative partners with barber shops to provide books to young boys, allowing them to take them home and get free back-to-school haircuts if they read them.
- A collective creates a parent leadership program and then supports parents to show up as advocates at city council meetings in support of their shared agenda.

How have you learned about community history and community assets? Who is trusted and valued in the community?

What relationships do you have with trusted community members who can help you access and connect to groups of residents?

What avenues have you created for listening to the community? What could you do to listen more and engage the perspectives of community members in your work?

What role can community members play in acting with community, helping produce outcomes and systems changes?

Strategy 5: Build Equity Leadership and Accountability

We have found that leaders who commit to practicing racial equity demonstrate that commitment in a variety of ways, and that they invite others to hold them accountable to them. Please rate yourself on this list and consider examples of how you individually and your coalition as a group have done and could improve upon these practices.

1. INDIVIDUAL LEADERSHIP PRACTICES			
Practice	**Rate your practice (1 – 5)**	**Example of how you have practiced this**	**What are steps you could take to practice further?**
Seek out authentic relationships with people of other races to share and learn			
Actively seek diverse perspectives before making decisions about communities or populations not your own			
Promote antiracist narratives about communities, populations, and issues, and interrupt biased or racist narratives you hear			
Name your bias patterns and invite others to hold you accountable when they see them			
Make sure all groups and tables you convene are racially diverse and inclusive, continually analyzing and correcting for disparities in participation			
Show up for leaders of color, people of color-led organizations, and public issues impacting communities of color (not just when your interests are involved)			
Visibly take stands and be willing to risk and sacrifice resources and relationships in order to stand up for racial equity and justice			

2. LEADERSHIP PRACTICES OF YOUR COALITION			
Practice	Rate your group's practice (1 – 5)	Example of how you have practiced this	What are steps you could take to practice further?
Make a visible commitment that articulates measurable goals & expectations for the collective; invite stakeholders to hold you accountable			
Acknowledge where your organization, partners, & systems have fallen short on racial equity in outcomes, engagement, or leadership			
Ensure that backbone staff policies, practices, & culture are analyzed and corrected for bias and disparities			
Establish expectations for partners on their racial equity practices in terms of outcomes and participation			
Make sure all steering or workgroup tables are racially diverse and inclusive; continually analyze and correct for disparities in participation			
Work to actively shift power in the coalition so white leaders or white-dominant institutions are not controlling the process			
Show up for leaders of color, people of color-led organizations in your collective, & public issues impacting communities of color (not just when your agenda is involved)			
Visibly take stands as an initiative and be willing to risk and sacrifice resources and relationships in order to stand up for racial equity and justice as a collective			

What are the priorities for your development of racial equity leadership?

What are the priorities for your coalition practicing racial equity leadership?

Workplanning: Setting Your Agenda

Review your responses to the toolkit. Answer the following questions in the tables below or in your journal:

1. What are up to five priority individual action items you will take during the next six months to advance your racial equity journey?

2. What are up to five priority action items your team agrees that your coalition will undertake during the next six months to advance your collective racial equity work? For each action item, answer the following questions:

   • Why is this action important to our collective impact initiative and results?
   • When will it be completed?
   • Who will be accountable for making this happen?

1. INDIVIDUAL ACTION COMMITMENTS		
Priority action and outcome you seek	**How will you be accountable?**	**When?**
Who will I share my commitments and progress with to hold me accountable?		

2. TEAM ACTION COMMITMENTS			
Priority Action	**Why?**	**When?**	**Who?**

How will we hold ourselves and each other accountable for these commitments?

Appendices

Equity and Collective Impact Resources

Advancing Equity in Collective Impact (Virtual Coffee), Collective Impact Forum (2019): **https://www. collectiveimpactforum.org/resources/advancing-equity-collective-impact-virtual-coffee**

Beyond Seats at the Table: Equity, Inclusion, and Collective Impact, Vu Le's Keynote, Collective Impact Forum (2018): **https://www.collectiveimpactforum.org/blogs/1/beyond-seats-table-equity-inclusion-and-collective-impact-video-and-transcript**

Bringing an Anti-Racist Approach to Collective Impact, Miya Cain interview with Zea Malawa (podcast), Collective Impact Forum (2021) **https://collectiveimpactforum.org/resource/bringing-an-anti-racist-approach-to-collective-impact-interview-with-dr-zea-malawa/**

Bringing an Equity Lens to Collective Impact, Junious Williams and Sarah Marxer, Collective Impact Forum (2014): **https://collectiveimpactforum.org/blog/bringing-an-equity-lens-to-collective-impact/**

Centering Equity in Collective Impact; Sheri Brady, Jennifer Splansky Juster, John Kania, Mark Kramer, Paul Schmitz, and Junious Williams, *Stanford Social Innovation Review* (Winter 2022): **https://ssir.org/articles/entry/centering_equity_in_collective_impact**

Centering Equity in Collective Impact Webinar, Collective Impact Forum (2022): **https://collectiveimpactforum.org/resource/centering-equity-in-collective-impact-webinar/**

Community Engagement Matters (Now More Than Ever), Paul Schmitz and Melody Barnes; *Stanford Social Innovation Review* (Spring 2016): **https://ssir.org/articles/entry/community_engagement_matters_now_more_than_ever**

The Culture of Collective Impact, Paul Schmitz, Collective Impact Forum (2014): **https://collectiveimpactforum.org/blog/the-culture-of-collective-impact/**

Equity and Collective Impact (three-part series from FSG, Aspen Forum for Community Solutions, and PolicyLink), *Stanford Social Innovation Review* (2015): **https://ssir.org/equity_and_collective_impact#**

Equity Matters in Collective Impact, Angela Glover Blackwell's Keynote, Collective Impact Forum (2015): **https://collectiveimpactforum.org/equity-matters-in-collective-impact/**

Equity: The Soul of Collective Impact; Michael McAfee, Angela Glover Blackwell, and Judith Bell; PolicyLink (2015): **https://www.policylink.org/sites/default/files/Collective_Impact_10-21-15f_0.pdf**

A Guide to Racial and Ethnic Equity Systems Indicators, StriveTogether (2020/2021): **https://www.strivetogether.org/wp-content/uploads/2021/09/A-guide-to-racial-and-ethnic-equity-systems-indicators.pdf**

How to Embed Equity into Collective Impact Initiatives, Collective Impact Forum (2021): **https://www.collectiveimpactforum.org/resources/how-embed-equity-collective-impact-initiatives**

Operationalizing Equity in Collective Impact, john a. powell's Keynote and Chat with Michael McAfee (podcast), Collective Impact Forum (2020): **https://www.collectiveimpactforum.org/resources/john-powell-operationalizing-equity-collective-impact**

SSIR Guide to Collective Impact, 10 Years Later (online series including several pieces about collective impact and equity) *Stanford Social Innovation Review* (2021 – 2022): **https://ssir.org/articles/entry/ssir_guide_to_collective_impact_10_years_later**

Organizations with Additional Tools, Information, and Learning Opportunities about Centering Racial Equity in Collaborative Work (a nonexhaustive list)

- Aspen Forum for Community Solutions: **https://www.aspencommunitysolutions.org/**
- Beloved Community: **https://www.wearebeloved.org/**
- Building Movement Project: **https://buildingmovement.org/**
- Equity in the Center: **https://equityinthecenter.org/**
- Government Alliance on Race Equity (GARE): **https://www.racialequityalliance.org/**
- Grantmakers for Effective Organizations: **https://www.geofunders.org/**
- Interaction Institute for Social Change (IISC): **https://interactioninstitute.org/**
- Othering & Belonging Institute: **https://belonging.berkeley.edu/**
- PolicyLink: **https://www.policylink.org/**
- Philanthropic Initiative for Racial Equity: **https://racialequity.org/**
- Race Forward: **https://www.raceforward.org/**
- Race Matters Institute: **https://www.racemattersinstitute.org/**
- Racial Equity Tools: **https://www.racialequitytools.org/**

Notes

About the Collective Impact Forum

The Collective Impact Forum is an initiative of FSG and the Aspen Institute Forum for Community Solutions. We work to inspire and support people using a collective impact approach to bolster community-driven solutions that achieve equitable outcomes for individuals and communities. The Collective Impact Forum hosts convenings, facilitates peer learning, curates an online resource center, and offers custom workshops and coaching. Learn more at collectiveimpactforum.org.

About FSG

FSG is a global nonprofit consulting firm that partners with foundations and corporations to create equitable systems change. Through customized consulting services, innovative thought leadership, and learning communities, we're working to create a world where everyone can live up to their full potential. Learn more at fsg.org.

About the Aspen Institute Forum for Community Solutions

We promote collaborative, community-based efforts that build the power and influence of those with the least access to opportunity, and support communities to come together to expand mobility, eliminate systemic barriers, and create their own solutions to their most pressing challenges. Learn more at aspencommunitysolutions.org.