



Measuring Success in Advancing Equity

Authors and contributors: Mathematica staff (Isabel Callaway, George Smith, Lama Hassoun Ayoub, Lauren Amos, Nazihah Siddiqui) and expert consultants with lived experience (Madison Dao-Whitten, Miranda Encina, Danielle Lucero).¹

This content was initially created to inform federal staff at the U.S. Department of Health and Human Services. In an effort to increase collaboration and share promising practices, the Office of the Assistant Secretary for Planning and Evaluation has made this tool available for both public and private partners. Potential audiences that may be interested in these materials include, but are not limited to, state and local governments, tribal governments, and other private or non-profit organizations focused on programs and policies relating to health and human services. Links and references to information from non-governmental organizations is provided for informational purposes and is not an HHS endorsement, recommendation, or preference for the non-governmental organizations.

Purpose

This tool describes indicators for measuring the progress and success of efforts to advance equity in policies, practices, and programs. It is intended to increase the effectiveness of health and human services programs for all, including implementing efforts to ensure equitable outcomes.

Overview

Health and human services policies and programs have wide-ranging effects on individuals and communities. Those effects can facilitate optimal health and well-being or impose harm, particularly for historically underserved communities.

To address inequities in policy and program outcomes and/or prevent harm to individuals and communities, health and human services programs can work to make their grantmaking, research, program delivery, and policymaking more equitable by:

- Addressing structural and systemic barriers and factors contributing to inequitable access and opportunity.
- Assessing and changing policies, programs, and practices to create more opportunity.



What is Equity?

The consistent and systematic treatment of all individuals in a fair, just, and impartial manner, including individuals who belong to communities that often have been denied such treatment, such as Black, Latino, Indigenous and Native American, Asian American, Native Hawaiian, and Pacific Islander persons and other persons of color; members of religious minorities; women and girls; lesbian, gay, bisexual, transgender, queer, and intersex (LGBTQI+) persons; persons with disabilities; persons who live in rural areas; persons who live in United States Territories; persons otherwise adversely affected by persistent poverty or inequality; and individuals who belong to multiple such communities ([Executive Order 14091](#)).

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- Shifting internal culture, resources, and approaches to be more inclusive.
- Institutionalizing a focus on equity by building related internal capacities.

Measuring progress toward achieving these goals can help staff understand the success of initiatives and inform future efforts. In the next sections, we briefly discuss (1) how to get started and (2) indicators of the progress and success of equity-focused initiatives across short-, medium-, and long-term outcomes.

GETTING STARTED

Steps to align needs, actions, and desired outcomes

There are several critical steps you can take at the outset to help ensure your efforts address underlying drivers of inequity before you measure outcomes. Although this tool focuses primarily on assessing progress, the following premeasurement steps and resources can help provide a foundation for enhancing and effectively tracking impact. For more information, you can explore the [In-Depth Equity Assessment Guide](#).

Examine community conditions, including assets and needs, to understand what you are trying to address.

Conduct a **needs assessment** of individuals and communities with inadequate access to your services that includes a **root cause analysis** to identify underlying issues contributing to inequities.

1. A **needs assessment** is the process of identifying the current conditions for the individuals and communities you seek to serve, the desired conditions or outcomes, and the gap or distance between the current and desired states.²
2. To identify and understand the key factors driving inequity, a **root cause analysis** is an essential component of a needs assessment. This analysis helps ensure that your efforts are, in fact, relevant and central to the inequities you are attempting to mitigate,³ while also recognizing community and individual strengths.

Assess readiness for seeking equitable outcomes.

To implement and assess equity initiatives, reflect on the environment, or **facilitating conditions**, of your organization. Discuss the following questions as a team:

- Is there leadership buy-in and commitment? Are leaders open to making process changes based on the outcomes of the needs assessment and root cause analysis?
- Is there a shared understanding of mission and vision within the organization and with partners?
- Is there dedicated time, resources, and human capital to implement and assess equity-focused initiatives?
- What is the current staff's capacity, including bandwidth, knowledge, and skills related to equity and assessment? Do staff have access to equity-related trainings and tools to increase their knowledge and skills?
- Has the organization considered how to support the well-being of staff involved in the initiative, including those who may have intersectional identities that mirror those of the impacted communities?
- Have staff considered how their role in the organization may provide them with greater authority and decision-making power than impacted communities? How are those power dynamics between the organization and impacted communities addressed?

² For example, the Substance Abuse and Mental Health Services Administration provides information on [how states can conduct a needs assessment](#) to determine current community conditions and desired services or outcomes. See also "[Needs Assessment Toolkit Including Root Cause Analysis](#)" from the Connecticut State Department of Education.

³ For example, the Office of Elementary and Secondary Education outlines common [approaches for conducting a root cause analysis](#) and provides additional resources and tools. See also "[Root Cause Analysis Tools](#)" from the Administration for Children and Families.

- How are people with lived experience and impacted communities meaningfully included and engaged in this process?

Additionally, it is important to be aware of common **unintended negative consequences** that may occur when facilitating conditions and implementation do not support equitable outcomes.

Consider how to engage people with lived experience as part of your effort.

Lived experience refers to knowledge based on an individual's perspective, personal identities, and history, beyond their professional or educational experience (see "[What is Lived Experience?](#)"). Lived experience partners provide insights to inform policies, practices, and programs through their experience with relevant issues and initiatives and can be key collaborators in your assessment efforts, as well as contributors to your overall effort to achieve equity. Plan early for how you will meaningfully engage people with lived experience in your effort (see also "[Engaging People with Lived Experience to Improve Federal Research, Policy, and Practice](#)" and "[What Does it Look Like to Equitably Engage People with Lived Experience](#)").

Develop a plan that connects needs with actions that can drive desired outcomes.

Create a **theory of change** to conceptualize your plans and then a **logic model** that clearly outlines equity-related outcomes that happen because of actions taken. The logic model operationalizes the path to achieve those outcomes. Outcomes reflect resulting changes such as shifts in program participant accessibility or community access to services.

1. A **theory of change** articulates assumptions about how change will happen. It helps you determine how and why actions increase equity at a strategic or high level.⁴
2. A **logic model** helps you operationalize your theory of change at a tactical level. Logic models require decisions on what activities to implement (such as changing a policy, implementing an intervention, or expanding a program) and visually indicate how each activity will contribute to desired short-, medium-, and long-term outcomes.⁵

INDICATORS AND MEASUREMENT APPROACHES

Determining the effectiveness of equity-focused initiatives

Once you've aligned needs, actions, and desired outcomes in a logic model, you can develop and implement a plan to monitor your progress towards the desired outcomes for your equity initiative. For example, if you are measuring equity in the context of a specific program, it may be helpful to consider how your measures fit into the different steps in a participant's experience of the program, such as:

- Individuals' and families' ability to **access and enroll in programs** for which they are eligible. This may include program reach (e.g., percentage of the eligible population who apply for and receive program services) and enrollment process and burden (e.g., percentage of new enrollees by mechanism—in-person, mail, or online—and populations served).
- Ability to receive **timely and adequate benefits and services**. Once someone has access to a program as measured in the bullet above, it is important to consider quality and adequacy of its benefits and services. This may include measures of customer experience (e.g., average phone wait times), administrative barriers (e.g., percentage of participants receiving a penalty during participation, by type of action and population group), and cultural responsiveness (e.g., percentage of program staff representing participant population).

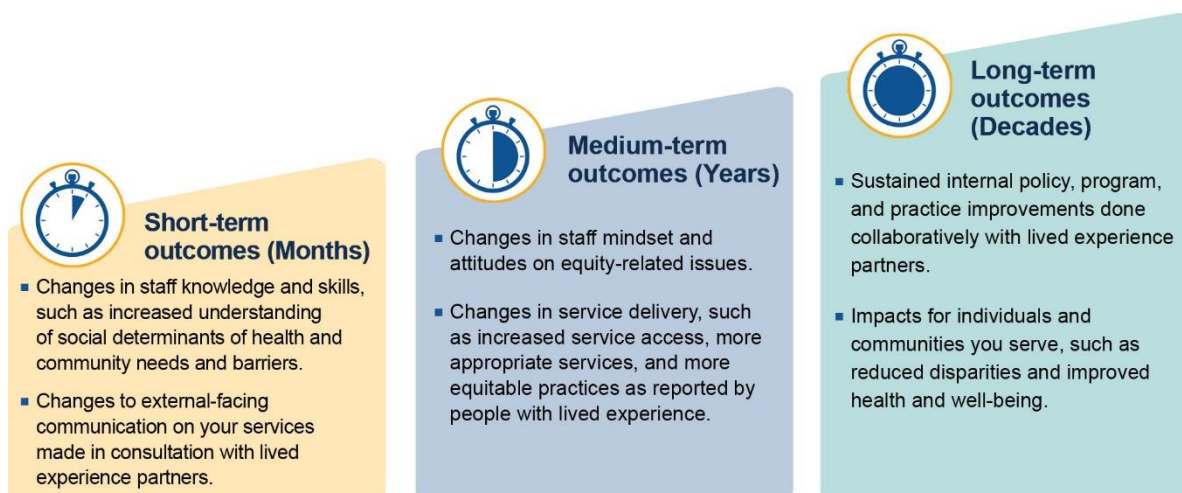
⁴ For example, the Annie E. Casey Foundation's "[Developing a Theory of Change: Practical Theory of Change Guidance, Templates, and Examples](#)" guides funders and programs to pursue ambitious social change. The guide details theory of change models and provides a toolkit. For more on creating a theory of change, see "[Constructing a Racial Equity Theory of Change](#)."

⁵ For example, "[Using Logic Models to Guide the Planning and Evaluation of Complex Initiatives](#)" highlights how logic models can be an effective tool for planning the evaluation of complex initiatives an organization may pursue, particularly those that aim to promote equity. See also Multnomah County, Oregon's "[Equity and Empowerment Lens Logic Model](#)."

- Whether participants achieve expected **program outcomes**.⁶ Typically, program outcomes are what an individual is expected to achieve through participation in a program (e.g., obtaining employment, increased earnings).
- While these specific examples may not be relevant to your equity initiative, they demonstrate a way of breaking down a large, complex effort into components. Your logic model and the other premeasurement considerations explained above can help you determine what to measure for your equity initiative. Which equity-related outcomes to measure will directly relate back to your initiative's theory of change and logic model, and may include:
 - Improvements in outcomes for groups served that have disparities in those outcomes compared to other groups. Examples include access, coverage or resources, quality of services or other indicators of health and well-being.
 - Measuring internal factors (e.g., changes in staff capacity, staff mindsets, and internal policy, such as increased efforts to work with lived experience partners) or external factors (e.g., increased access for communities served) may also be important to understanding to what extent equity initiatives build on one another to enable more structural and sustainable change.

Short-term outcomes are immediate changes, often those within your organization that occur within weeks or months, as well as simple external-facing changes. **Medium-term outcomes** refers to intermediate or prerequisite changes within or outside of your organization's policies and programs that occur within months and years. **Long-term outcomes** are desired impacts internal or external to your organization that may take years or decades to occur.⁷ Particularly for long-term outcomes, success may be difficult to attribute directly to equity initiatives. Demonstrating short- and medium-term outcomes can help show how the equity initiative is linked to the ultimate long-term outcome(s). Similarly, rigorous quantitative research methods (e.g., experimental or observational studies) directly examine the effects of an initiative and can be complemented with qualitative data analysis. Exhibit 1 provides examples of each type of outcome.

Exhibit 1. Sample short-, medium-, and long-term outcomes of equity-focused initiatives



To monitor progress, identify **indicators** that demonstrate progress towards an outcome. Indicators are evidence that your initiative is on-track for success. Indicators should be *specific*

⁶ NOTE: In this tool, the term *outcomes* generally refers to the outcomes from an equity initiative, while *program outcomes* refers to the expected outcomes for a specific program. Equity initiative outcomes may or may not relate to overall program outcomes. Additional information on how to determine equity initiative outcome measures can be found in the remainder of this tool.

⁷ See "[Identifying the Components of a Logic Model](#)."

(provide a clear description of what you want to measure), *observable* (focus on an action or change), and *measurable* (quantify change and generally reported in numerical terms).⁸

Ultimately, outcomes and their indicators should tie back to the initial need identified before the measurement phase and the associated actions you take to address the need. The tables below provide example indicators for short-, medium-, and long-term outcomes. We present a scenario in each case to help illustrate the difference between outcomes and indicators, including indicators to monitor the extent to which the design and implementation of your equity initiative reflects the perspective of lived experience partners.

⁸ See "[Developing Evaluation Indicators.](#)"



Short-term outcomes

Example-in-practice scenario: An organization seeks to increase access to prenatal care for individuals from underserved racial and ethnic groups.

Outcomes	Potential indicators	Example in practice
Improved staff perceptions of the importance and value of pursuing equitable outcomes	<ul style="list-style-type: none"> Shifts in perceptions of the importance, value, and usefulness of equity-focused learning Prioritization of equity initiatives Awareness of disparities communities face and factors that contribute to those disparities 	The organization conducts a training session for staff on inequities in access to care and barriers faced by underserved communities. After the session, staff complete surveys on their understanding of how the organization's work may contribute to or hinder access for these populations, and the usefulness of the information in advancing equity in their respective work.
Increased staff interest in learning about equity-related topics and applying learning to their work	<ul style="list-style-type: none"> Participation in equity-focused trainings, affinity groups, and learning groups Use of guides or tools Requests for additional learning opportunities 	Technical assistance providers develop a set of tools and checklists to help staff evaluate the accessibility and cultural responsiveness of programs provided to the underserved communities. The organization monitors monthly website views and downloads of the tools and checklists. When views and downloads begin to decrease month-to-month, the organization surveys staff to identify resources and additional topics for trainings.
Increased staff understanding of barriers faced by individuals and communities served, of existing disparities in service access or use, and of systemic or structural factors in inequities	<ul style="list-style-type: none"> Awareness and understanding of existing barriers and disparities Ability to identify practices or program components that could contribute to barriers or reinforce inequities Perception of value in engaging lived experience partners to understand how organization decisions affect individuals and communities Identification of barriers to service access Awareness of effects of power at individual and institutional levels Development of strategies for engaging lived experience partners 	<p>Staff participate in a work session to review organization-provided past examples of practices that unintentionally contributed to negative outcomes for communities served. A lived experience partner leads the work session.</p> <p>Afterwards, staff and lived experience partners complete a survey to measure confidence in staff ability to identify inequitable practices in their respective work and their engagement satisfaction. They then develop a plan to engage lived experience partners representing these communities in their work.</p>
Incorporation of an equity focus in staff's daily work	<ul style="list-style-type: none"> Intentions to apply learning; descriptions of how knowledge/skills can be applied to daily work Evidence of the application of skills/knowledge (e.g., document updates/modifications to analysis techniques) Frequency of skill use at work Development of additional skills, such as communication or analysis skills 	Staff reanalyze existing data on prenatal care access by subgroups to quantify disparities in provided programs. Staff then collect additional data and use new techniques to understand and identify barriers to access. Efforts to increase access through data analysis are identified during equity assessments.



Medium-term outcomes

Example-in-practice scenario: A funding organization seeks to increase applications from communities that are new to the organization's grants.

Outcomes	Potential indicators	Example in practice
Improved staff skill development and increased use	<ul style="list-style-type: none"> Continued desire for more specialized equity-focused resources Internal creation of tools, checklists, reviews, and trainings to advance organization-specific initiatives Intentional spaces created to work through and apply equity practices individually (e.g., formal learning groups) Routine (e.g., quarterly) solicitation of lived experience partner feedback on potential policy, program, process, and practice changes 	Staff update applicant scoring rubrics to incentivize first-time applicants, building on input from lived experience partners and community members. Staff document application changes and monitor the number of first-time applicants before and after revising the grant requirements.
Development of new organization-wide policies to identify and mitigate systematic or structural factors contributing to inequitable outcomes	<ul style="list-style-type: none"> New formalized (or updated) community engagement plan; inclusion of community partners' perspectives in decision-making as allowable and encouraged New initiatives primarily focused on addressing disparities or inequities Increased inclusion of members of target communities on grant review panels Anonymous feedback on perceptions of institutional progress on strengthening the equity focus of programs and practices Embedded internal and external communication practices that are inclusive, avoid bias, and demonstrate cultural awareness (e.g., routine translation of public-facing materials) Investment in future equity trainings and resources to support equity initiatives Formal/written evidence of lived experience partner recommendations in policies (e.g., revised program eligibility guidelines) 	<p>Staff work closely with a prior grantee who was a first-time applicant to gather recommendations on how to make the grant application and process more accessible. Staff document any changes and decisions made due to the partnership.</p> <p>The organization provides continuous learning opportunities focused on understanding barriers to program access and opportunities. Staff use training resources to create targeted communications to help diversify the applicant pool and increase the number of first-time applicants.</p> <p>Community partners are invited to participate as grant reviewers and given decision-making power. Staff continue to work to diversify grant review panels.</p>
Implementation of data systems and reporting infrastructure to track equity-related measures and outcomes	<ul style="list-style-type: none"> Development of internal systems to track equity-related outcomes Data collection focused on monitoring equity outcomes (e.g., community access and use of services) Perceptions of usefulness of reporting systems Regular use of data from tracking systems to improve practices and programs and inform decision making 	Staff develop an internal tracker of grant applicants and panel membership and share broadly with other staff and leadership.
Expansion of culturally relevant and appropriate services within underserved communities	<ul style="list-style-type: none"> Awareness and knowledge of barriers experienced by underserved communities, as represented by lived experience partners Revised outreach materials and interview protocols Increased awareness of service needs within specific communities Service access metrics demonstrating increased awareness/use Co-creation and dissemination of community-focused products and resources Satisfaction with services among recipients 	Staff compare number of first-time applicants year-to-year. Staff reach out and interview new applicants to understand factors in their decision to apply for the grant and gather other suggestions to diversify the applicant pool. Staff contact potential applicants that did not apply to find out why and work with lived experience partners to create resources for future applicants.



Long-term outcomes

Example-in-practice scenario: An organization seeks to increase trained public health nutrition professionals who reflect the diversity of communities served and can effectively manage and deliver interventions that promote healthy nutritional habits among mothers, children, and families.

Outcomes	Potential indicators	Example in practice
Sustained efforts to make policy, programs, and practices more equitable	<ul style="list-style-type: none"> ▪ Institutional policies that embed a focus on promoting equity and reducing inequities ▪ Diverse staff and lived experience expertise that reflects the communities served ▪ Equitable data collection and dissemination practices ▪ Alignment between organization priorities and self-reported community priorities ▪ Resource allocation to programs and policies that demonstrate equitable implementation and outcomes, including partnership with people with lived experience 	<p>Organization prioritizes recruiting and training nutrition professionals that reflect the lived experience and demographics of the community members they serve.</p> <p>Staff conduct listening sessions with current and prospective nutrition professionals at regular intervals to better understand their varying needs and ultimately improve programming. Staff are aware of barriers to healthy habits in underserved populations. Staff share and explore the meaning of the findings with listening session participants and collaborate with lived experience partners to make changes based on their input.</p>
Increased collaboration with other organizations to address structural and/or systemic barriers using a multi-faceted approach	<ul style="list-style-type: none"> ▪ Shared equity metrics and goals across organizations ▪ Decrease of data silos and sharing of best practices strategies for reducing inequities 	<p>Staff across organizations meet to discuss best practices for recruiting diverse nutrition professionals and tailoring the nutrition services offered to the community with input from lived experience partners.</p>
Reductions in service access disparities and inequitable practices experienced by certain groups	<ul style="list-style-type: none"> ▪ Data on shifts in demographics of service recipients ▪ Organization-specific disparity reduction metrics ▪ Evidence of effectiveness from evidence-based practices for inequity reduction ▪ Perception of credibility and trust in organization practices by community members 	<p>Staff disaggregate data by race, geography, age, and other important demographics to see how disparities between certain groups have shifted. Staff have a better understanding of what works for whom and under what circumstances and apply that knowledge to make additional program improvements.</p>
Improved health outcomes for program recipients	<ul style="list-style-type: none"> ▪ Program-specific health and health-equity outcomes as reported by communities ▪ Frequency of medical visits for nutrition related issues ▪ Quality of life metrics ▪ Incidence of obesity, diabetes, or related negative health outcomes in the community ▪ Evidence of healthy eating and exercise habits 	<p>Staff measure relevant health outcomes and work with lived experience partners to conduct a program evaluation on how and why health outcomes have improved among mothers, children, and families.</p> <p>Staff collect annual data on nutrition-related visits to doctors' offices and clinics that serve the community. Staff also survey community members regarding changes in nutritional habits.</p>

Additional Resources

- ▶ Digital.gov. [U.S. Public Participation Playbook](https://digital.gov/guides/public-participation/). (n.d.). Accessed July 2023. Available at <https://digital.gov/guides/public-participation/>.
- ▶ Hatchuel Tabernik and Associates. (2021). "[Oakland Fund for Children and Youth: Community Needs Assessment & Racial Equity Analysis](https://www.ofcy.org/assets/Uploads/OFCY-CNA-REA-Final-10.15.21.pdf)." Available at <https://www.ofcy.org/assets/Uploads/OFCY-CNA-REA-Final-10.15.21.pdf>.
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- ▶ Nelson, J. and L. Brooks. (2016). "[Racial Equity Toolkit: An Opportunity to Operationalize Equity \(Racial Equity Alliance\)](https://racialequityalliance.org/wp-content/uploads/2015/10/GARE-Racial_Equity_Toolkit.pdf)." Government Alliance on Race and Equity. Available at https://racialequityalliance.org/wp-content/uploads/2015/10/GARE-Racial_Equity_Toolkit.pdf.
- ▶ The Mitre Corporation. (2021). "[A Framework for Assessing Equity in Federal Programs and Policies](https://www.mitre.org/sites/default/files/2021-11/prs-21-1292-equity-assessment-framework-federal-programs.pdf)." Available at <https://www.mitre.org/sites/default/files/2021-11/prs-21-1292-equity-assessment-framework-federal-programs.pdf>.
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- ▶ U.S. Department of Health and Human Services, Office of the Assistant Secretary of Planning and Evaluation. (n.d.). "[Measuring T/TA Effectiveness](https://aspe.hhs.gov/measuring-tta-effectiveness)." Accessed July 2023. Available at <https://aspe.hhs.gov/measuring-tta-effectiveness>.

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