ADVANCING EQUITY: DATA FOR EQUITY CAPACITY-BUILDING COHORTS

By Public Profit
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As a funder, you value equity and want your funding to achieve outcomes in an equitable way. Perhaps you've created rubrics assessing the staff diversity or commitment to equity of those applying for funding. Perhaps you've invested capacity-building dollars in diversity and inclusion support for existing grantees such as diversity consultants or in-depth training. Probably you are on your own internal Diversity, Equity and Inclusion (DEI) journey. Now, you want to measure whether your funding achieves equitable outcomes. How do you support your grantees to measure this in a meaningful and lasting way?

The following brief outlines one funder's response to the need to achieve equitable outcomes, by investing in a supportive, transformational capacity-building grantee cohort. This brief shares the origins of the cohort, the key components that led to this cohort's success, and how this approach could benefit other organizations and their funders.

Tipping Point Community finds, funds, and amplifies the most promising poverty-fighting solutions so one day everyone can prosper in the Bay Area. Since 2005, Tipping Point has invested over $350 million in community interventions, policy change, and new ideas. Last year, our grantees provided life-changing services in housing, early childhood, education, and employment to more than 100,000 of our neighbors across the Bay Area. Visit www.tippingpoint.org to learn more.

HOW IT STARTED

Tipping Point Community funds over 40 non-profits in the Bay Area. Tipping Point had made public commitments to equity and wanted to act on those commitments. Initially, Tipping Point considered simply asking grantees for disaggregated program impact data: data on who was being served by programs and their outcomes broken down by race and other identity markers and lived experiences (e.g., having been in foster care).

But then they paused to reflect on what they really wanted: to support grantees to identify and remedy inequity. They realized that requiring disaggregated statistics can be a heavy lift for non-

profits, especially those that don't have mature in-house data, evaluation, and learning capacity. In addition, requiring disaggregated data could cause grantees to feel nervous about reporting any inequities they do uncover, for fear that it could negatively impact continued funding. In other words, their original approach could have the opposite effect of what was intended: grantee organizations could try to mask or bury inequities in program outcomes, rather than bringing them into the light of day and working to improve them.

Identifying and remedying inequity requires organizations to reflect on their data, break through the culture of silence created by white supremacy, and have hard conversations about organizational change. Tipping Point had previously invested in many grantees' Diversity, Equity, and Inclusion (DEI) efforts which tended to focus on internal culture and hiring practices. They had also invested in building the capacity of data and program staff to collect and use impact data to improve programming. Organizations needed support to bring these together: to use data to examine their program impact data through the lens of equity. So, in 2020, the Data for Equity cohort was born: a supportive capacity-building experience for grantees.

Tipping Point Community partnered with Public Profit, a program evaluation and strategy firm, and Change Cadet, a change management and organizational development firm in support of equity, inclusion, and belonging in the workplace. Participating representatives from grantee organizations learned together in virtual whole group sessions, engaged in equity-focused data projects, practiced new skills, and effected real change in their organizations. Grantees were encouraged to apply by their program officers; the facilitators of the cohort reviewed applications from interested participants to make sure they had sufficient grounding in DEI efforts and data practices and had an idea of a project they wanted to take on. Seven grantee organizations participated over the course of the first year; nine more participated the following year.

THE ELEMENTS OF SUCCESS

The Driving Towards Impact: Data for Equity cohort (DTI) focuses on organizational development and culture change.

Organizational Pairs

DTI seeks to move organizations beyond simply disaggregating data. Rather, the cohort requires that organizations ask and answer a critical question that has implications for their program design and organizational culture. In order to support this more complex approach, the program requires two participants from each organization.

One participant is well-versed in the organization's data. This staff member is generally from a data or evaluation department. They are familiar with the data already available, including existing data systems and data collection, and can identify a data project that is feasible in the timeframe.

The other participant is an organizational lead who has direct access to other leaders and is familiar with current strategic efforts across the organization. The organizational lead builds buy-in across the leadership team, can broker access to key decision-making bodies, and identifies opportunities to align with other strategic work within the organization.

Stronger together, the data staff and organizational lead partner span the skills and positional power needed for the work: asking good questions about equity, engaging in data work to answer those questions, and sharing findings with the organization to affect change.

Common organizational pairs include a Director of Programs or of Operations and a data analyst (e.g. "Impact Analyst"). Some organizations with robust data and evaluation departments have sent the head of that department (e.g., "Manager of Data and Analytics"). Some organizations have sent a pair of senior leaders (e.g., the "Chief Program Officer" and the "Director of Organizational Impact"). The key is to have at least one person who has the ear of senior leadership and at least one person with their hands in the data itself.

DTI builds concrete skills and practices that can be used beyond the cohort experience.

There are few blueprints for how to navigate the intersection between data work, organizational change, and equity. The number of resources that support organizations at this intersection is growing. However, many organizations still wonder how to do this work well. DTI supports staff to identify and practice concrete skills that they can apply to future work within their organization, strengthening their organization and the social sector as a whole. DTI builds these skills through three elements: the Data for Equity project; whole group sessions; and strategic coaching and data technical assistance.

Grantees need months to complete a meaningful project. In the first year, it was anticipated grantees would complete their project within 6 months. Most took 9 months. Grantees need time to identify and refine their inquiry questions. Many will opt to collect new, qualitative data, and need roughly 9 months to collect and analyze that data, and present their findings.

Data for Equity Project

At the heart of the initiative is the Data for Equity project. All participating organizations are required to design and complete an equity-focused impact data project. The project culminates in a conversation with their organizational leaders about the implications of the findings. The project ensures that grantee representatives apply what they are learning in the other components of the effort. Also, by grappling with the real-world constraints (e.g. limited staff bandwidth, poor data quality) and opportunities (database features, participant advisory boards, organizational DEI initiatives), they gain insights into how to sustain their data for equity work after the cohort experience has ended.

> " *I got real clarity of why it is important for us to collect, evaluate and use data to assess if we are operating equitably in our program operations and will layer this new framework across all of our training programs.* "
> - DTI cohort participant

Full Group Sessions

Full group sessions provide a chance for the cohort to learn and grow together. The full group sessions are attended by both representatives from the grantee organizations. Sessions frequently include guest speakers grappling with similar inquiry questions and challenges. Sessions are facilitated by a representative from Public Profit and Change Cadet.

Full group sessions are hands-on training sessions, giving participants a chance to apply the content they are learning. Each session, the facilitators introduce Data for Equity strategies, such as power maps, bias checks, managing up, strategies for collecting demographic data, and qualitative collection and analysis strategies. Then, participants are given time to practice these during the session. For example, after introducing the concept of a power map – a diagram detailing the lines of power between different stakeholders involved in the evaluation – organizational pairs create the diagram for their Data for Equity project. This dedicated time to practice new skills and troubleshoot roadblocks keeps the projects moving forward.

Both DTI cohorts have taken place since the onset of the COVID-19 pandemic. Full group sessions took place over Zoom and were three hours long. The content for the sessions was divided into 6 sessions over the course of 9 months. It is recommended, in the future, when it becomes possible to meet in person, for fewer, full-day sessions.

Strategic Coaching & Data Technical Assistance

DTI provides two forms of tailored support for each organization: strategic coaching and data technical assistance. Coaching, conducted by the main facilitators, helps the grantees think through their project strategy, including their inquiry questions, the scope of their project, and their presentation to leadership. Coaching is offered at the beginning, mid-point, and end of the cohort experience. Coaching takes place in a small group – the two facilitators and the organizational pairs – which helps weave together the DEI, data, and organizational change aspects of the work. Coaching focuses on identifying the project at the beginning and planning the presentation to their organization at the end of the project.

The data technical assistance provides extra muscle to complete the Data for Equity project. For example, one organization wanted to interview clients, something they had not done in a long while. The organization's technical assistant edited their interview protocol, advised them on their outreach strategy, helped them overcome recruitment obstacles, and facilitated a meaning-making session to solidify their findings. Without the technical assistance support, they could have gotten stuck at multiple points along the way. With the support, they were able to finish their project, complete their qualitative data analysis, and share their findings and recommendations. Technical assistance is offered primarily in the second half of the cohort's year, once the project has been identified. This assistance can also help organizations who lack sufficient staff capacity, so this does not become a barrier to participation.

> **"** *Everything was excellent, but if I had to pick a few things I would say the presentations were great and often eye opening, the coaching sessions were great. I didn't think we could work together and feel immersed in the projects from our "virtual" gatherings, but it really did work. Our technical assistance was excellent and gave such valuable insight.* **"**
> - DTI cohort participant

DTI attends to safety and belonging.

This work is hard. There is a culture of silence surrounding race and equity, driven by white supremacy culture, that makes it difficult to facilitate meaningful conversations within nonprofit organizations. This can be made more difficult when staff feel that they are a lone DEI champion within their organization. DTI supports participating staff by creating a safe place to reflect and learn and by providing opportunities to feel part of a movement bigger than themselves. By the end of the initiative, DTI helps participants have the support they need to continue with their DEI and equity work, even in the face of inevitable challenges.

A Safe Space

The group sessions are facilitated so there is a safe space for sharing. The sessions start with the acknowledgement that racism, white supremacy, and systematic oppression are known challenges for organization and the communities they serve. By starting with this acknowledgement, the initiative centers the lived experiences of Black, Indigenous and people of color (BIPOC) and other participants. No one has to worry about proving that racism exists in the first place.

The sessions create opportunities for multiple learning styles and value self-care. Across the sessions, they incorporate full group share outs, small group break outs, verbal, written, and visual activities, music, and silent reflection. The ground rules support people to grow and stretch, but also to exercise self-care. For example, ground rules include the right to turn off their video camera in virtual sessions or not share their reflections at any time.

> **❝** *What I feel I gained the most is the confidence and empowerment in bringing up the inequities around our approach/work in our organization, within my peer group of program managers, the team I oversee and their work with clients, as well as in our collateral work with our outside partners.* **❞**
> - DTI cohort participant

Belonging to a Network

Data and evaluation can be siloed within organizations, relegated to a database and reporting department. DEI work can be tokenized and marginalized. The DTI cohort creates connections within organizations and across organizations, knowing that the work is stronger when done together. The effort develops a peer network of support through small group work and peer consultancies[1] during the sessions. As each Data for Equity project evolves, coaches connect organizations who can support each other. These connections provide opportunities for organizations to confer with others working on a similar project or encountering a similar challenge.

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[1] Adapted from one developed by the National Equity Project, www.nationalequityproject.org.

EXAMPLES OF SUCCESS

❖ A participating nonprofit investigated preliminary evidence that Black families had a more challenging experience with their agency than other families. The team conducted a series of focus groups with Black participants and recruited an advisory committee of participants and staff to review and interpret the findings. The team presented their findings to the organization's leadership team, connecting the data for equity work explicitly to the organization's diversity, equity, and inclusion goals. The organization is now implementing the team's recommendations, including changes to hiring practices and changes to policies about how staff interact with clients at reception.

❖ One organization bases its program model on matching staff to families based on cultural background and language spoken. However, they had never investigated whether this was connected to family outcomes. The team matched existing demographic data on families and staff to data on the family's retention in the program and immediate outcomes. The team found that, in fact, there is a meaningful correlation between family outcomes and having a staff member that is a cultural and language match. They are now expanding this study with qualitative work to better understand how families experience this match and how this match supports outcomes.

❖ A participating organization long suspected that one of its flagship programs served fewer women and Black participants compared to other participant groups. Given that this program had the potential to place people in higher-paying jobs than other training programs, this potential inequity was troubling. Staff combed through past years of program data. They discovered that there were more women and Black participants than they had suspected, but that women and Black participants received different supportive services while in the program. They were also less likely to achieve the desired program outcomes. The organization is now embarking on qualitative data collection, including interviews with staff and former participants, to better understand why these disparities might exist and how to address them.

> " *We have prioritized looking at evaluations and programming through an equity lens and have implemented this breakdown in all our learning agenda questions. We have received trainings on DEI/Implicit bias as well.* "
> - DTI cohort participant

THE BENEFITS ARE GREAT

Through a DTI cohort, funders can be accountable to their commitments and build trust with stakeholders. For grantee organizations, the Data for Equity project itself has immediate impact. Grantees answer important questions that lead to organizational change. The effort also builds internal capacity to look at data through an equity lens, and to hold the hard conversations that come from what the data show, strengthening teams' ability to use data to improve practice in ways that matter.

> 66 *The DTI project helped us lay the foundation for equity work at our organization. In particular, I also think it provided a starting point to begin potentially difficult conversations with senior leadership.* 99
> - DTI cohort participant

The cohort has the potential to drive real change at grantee organizations and help these nonprofits pursue equity in their programs. A goal made all the more urgent by the events of 2020 and beyond: the COVID-19 pandemic, the inequities the pandemic brought into stark relief, the call to action spurred by the murder of George Floyd, and the events surrounding the 2020 U.S. Presidential Election.

If your foundation is considering an equity cohort... please reach out to hear more!

For more information, contact:

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LESSONS LEARNED

- This work takes time. Offer a year to do the work.
- Results are not linear. Be ready for projects to yield more questions than answers.
- Turnover can slow progress. Having two participants from an organization can keep the work from stalling if one staff member moves on from an organization.
- Keep this effort optional. If a team decides to opt out at any point, let them walk.
- Programs are more likely to take on too much than too little. Encourage programs to design manageable projects. It is ok to use existing data; try to limit any new data collection to one type (e.g., follow up interviews).