Equity Learning Lab

Curriculum Modules Overview

The Equity Learning Lab curriculum is divided into seven Modules with resources grouped into sub-topics within each module.

- **Self-guided Curriculum (Modules 1-4):** A set of self-guided learning resources that include a selection of recommended core resources, additional resources for a deeper dive on the sub-topic, and reflection questions.
- **Resource Bank (Modules 5-7):** A collection of practical tools and resources to support your learning and efforts to embed equity within your organization in the areas of strategy, organizational development, or evaluation & learning.

Self-guided Curriculum
1. Foundational Learning - Structural Racism and Health Equity
2. Making Space for Conversations on Equity and Race
3. Supporting Personal Reflection and Growth
4. Leading Organizational Change

Resource Banks
5. Resources for Embedding Race Equity in Organizational Development
6. Resources for Embedding Race Equity in Strategy
7. Resources for Embedding Race Equity in Evaluation and Learning

Module 7: Resources for Embedding Race Equity in Evaluation and Learning

Objective: Building on lessons on personal and organizational change dynamics, funded partners who are ready to put them into practice to advance equity in strategy will be able to activate their learning using the tools and resources outlined in this module.

- 7.1. Understanding the Principles of Equitable Evaluation & Research
- 7.2. Tools and Practices for Grounding Evaluation and Learning in Equity
- 7.3 Participatory Research & Evaluation
- 7.4 Methods for Centering Community Voice
- 7.5 Key Considerations for Data Analysis and Data Visualization
- 7.6 Understanding Bias in Algorithms
- 7.7 Data Sources
- 7.8 Theory of Change Overview
- 7.9 Examples and Case Studies: Embedding Equity in Strategic Plans and Theory of Change

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Sub-topic 7.1: Theory of Change Overview

Shifting the Evaluation Paradigm: Equitable Evaluation Framework
Source: Equitable Evaluation Initiative and Grantmakers for Effective Organizations
Type: FRAMEWORK - 42 pages
This document provides an overview of the Equitable Evaluation Framework™, which invites evaluation practitioners to consider beliefs, assumptions, and preconceptions as a way to support evaluators in their efforts to align evaluation practices with an equity approach—and even more powerfully, to use evaluation as a tool for advancing equity. The three principles of the Equitable Evaluation Framework are described on page 11, and entry points, readiness indicators, and additional ways to translate the framework into practice start on page 19.

Equitable Evaluation Initiative's Working Theory of Change
Source: Equitable Evaluation Initiative
Type: FRAMEWORK - 2 pages
This working Theory of Change outlines the assumptions, intention, strategy, and principles for the Equitable Evaluation Initiative.

ChicagoBeyond's Why Am I Always Being Researched? Guidebook
Source: ChicagoBeyond's Equity Series
Type: GUIDEBOOK - 112 pages
This guidebook outlines an equity-based approach to research that offers one way to shift the power dynamic and the way community organizations, researchers, and funders uncover knowledge together, and restore communities as authors and owners. On pages 8-26, the guide identifies seven inequities in research, alongside seven opportunities for change. The guide includes concrete suggestions for potential ways forward for community organizations, funders, and researchers in each phase of the research process.

Sub-topic 7.2: Tools and Practices for Grounding Evaluation and Learning in Equity

Racial Equity Impact Assessment Guide
Source: Race Forward
Type: ASSESSMENT - 2 pages
This guide includes questions to use to anticipate, assess, and prevent potential adverse consequences of proposed actions on different racial groups.

Race Matters: Racial Equity Impact Analysis
Source: The Annie E. Casey Foundation
Type: REPORT - 1 page

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This 1-page Race Equity Impact Analysis Tool provides a set of guiding questions to determine if existing and proposed policies, programs, and practices are likely to close the gap for specific racial disparities in the U.S.

LFA Equity Checklists
Source: Laura Bekes, Elba Garcia, Jessica Xiomara Garcia, and Sarah Illing for Learning for Action
Type: BLOG POST (5 minute read) + TOOL (8 checklists)
This set of checklists summarizes a series of considerations to support evaluators and their partners to incorporate an equity lens into various phases of evaluation work.

Racial Equity Toolkit: An Opportunity to Operationalize Equity
Source: Local and Regional Government Alliance on Race & Equity
Type: TOOLKIT - 28 pages
This toolkit published by the Local and Regional Government Alliance on Racial Equity is designed to integrate explicit consideration of racial equity in decisions, including policies, practices, programs, and budgets to support development of strategies and actions that reduce racial inequities and improve success for all groups. This toolkit offers a list of six key questions to guide regional and local governments through the decision-making process to align decisions and actions with racial equity goals. The appendix includes case examples illustrating the tools' application in Seattle, WA (starting on page 16) and Madison, WI (starting on page 25).

Data Driven Approaches to Achieving Health Equity
Source: Eileen Salinsky for Grantmakers in Health
Type: ARTICLE: 10 minute read
This brief article summarizes actionable guidance for using data to examine racial, ethnic, and other health inequities that emerged from Grantmakers in Health's 2019 Fall Forum meeting, Translating Evidence into Action: Data-Driven Approaches to Achieving Health Equity.

Confronting Structural Racism in Research and Policy Analysis
Source: K. Steven Brown, Kilolo Kijakazi, Charmaine Runes, and Margery Austin Turner for Urban Institute
Type: REPORT - 15 pages
This brief discusses the rationale for efforts at implementing institutional change; the range of challenges and constraints facing different types of research organizations; and experience to date with specific tools and strategies. It includes sections on recognizing the pervasive legacy of racist policies (page 2), navigating institutional choices and constraints (page 3), tools for moving forward (page 7), and assessing progress (page 11).

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A Toolkit for Centering Racial Equity Throughout Data Integration
Source: Actionable Intelligence for Social Policy (AISP)
Type: TOOLKIT - 76 pages
This resource library includes toolkits, guides, and case studies illustrating collective impact, a phenomenon which arises when important actors from different sectors align on a common agenda to solve a specific social problem. The library includes a section on bringing an equity lens and community engagement practices to collective impact efforts.

Sub-topic 7.3: Participatory Research & Evaluation

Participatory Evaluation: What is it? Why do it? What are the challenges?
Source: Ann Zukoski and Mia Luluquisen for Partnership for the Public's Health
Type: GUIDE: 6 pages
This 2021-2023 strategic plan describes a vision of embedding racial justice and advancing health equity. It is the American Medical Association's first strategic plan oriented towards equity.

Participatory Action Research and Evaluation
Source: Organizing Engagement
Type: GUIDE - 30 minute read
This guide provides an in-depth introduction to Participatory Action Research and Evaluation, a community-driven approach to research, evaluation, and social change that intentionally includes the people who are most affected by an inquiry in the design and execution of the process.

Participatory Evaluation: Theories + Methods for Remote Work
Source: Zachariah Barghouti for Evaluation + Learning Consulting
Type: GUIDE - 54 pages
This guidebook contains various resources and references for (1) integrating participatory methods into each stage of the evaluation process and (2) translating participatory methods to a virtual setting.

A Participatory Model for Evaluating Social Programs
Source: Yeheskel 'Zeke' Hasenfeld, Katherine Hill, and Dale Weaver for The James Irvine Foundation
Type: REPORT - 27 pages
This report is part instructional guide, part case study on a participatory approach to evaluation that centers client participation and uses evaluation as a tool for organizational learning. It includes twelve principles of the participatory evaluation model (page 4), methodological features of the model (page 8), and key ingredients of the model (page 14).

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Sub-topic 7.4: Methods for Centering Community Voice

Rutgers Photovoice Facilitator's Guide
Source: Rutgers with the Youth Empowerment Alliance
Type: GUIDE - 132 pages, accompanied by 7 PowerPoint presentations for African context and 7 PowerPoint presentations for Asian context
Photovoice is a participatory research method in which participants are asked to represent their point of view or opinion by photographing scenes relevant to the examined community or peer group. This guide aims to help facilitators prepare, organize, and facilitate a Photovoice training course in low, middle and high income countries. It covers pre-training preparation (page 9), getting started with Photovoice training (page 19), the basics of photography (page 35), how to work a camera (page 51), research questions (page 61), fieldwork (page 73), the selection process (page 83), the exhibition (page 103), and closure (page 111).

Participatory Video and the Most Significant Change
Source: InsightShare with UNICEF
Type: GUIDE - 105 pages
Participatory Video with the Most Significant Change technique (PVMSC) is a participatory approach to monitoring, evaluation and learning that amplifies the voices of participants and helps organizations to better understand and improve their programs. This guide is designed to support you in planning and carrying out evaluation using PVMSC, and includes an overview (page 14), key stages in PVMSC (page 32) and tools (page 48).

Community-Based Participatory Research: A Strategy for Building Healthy Communities and Promoting Health through Policy Change
Source: Meredith Minkler, Analila P. Garcia, Victor Rubin, and Nina Wallerstein for PolicyLink and the University of California, Berkeley School of Public Health
Type: REPORT - 60 pages
This paper provides an overview of community-based participatory research (CBPR). It includes principles for CBPR (pages 11-12), promising practices (pages 19-29), and six case studies of using CBPR to effect policy change in California (pages 32-46).

Sub-topic 7.5: Key Considerations for Data Analysis and Data Visualization

Diversity, Equity, and Inclusion in Data Visualization: General Recommendations
Source: Urban Institute
Type: LIST - 1 page

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This one-page list provides general recommendations for how to center diversity, equity, and inclusion in data visualization. A longer Do No Harm Guide from the Urban Institute is accessible [here.](#)

[Counting a Diverse Nation: Disaggregating Data on Race and Ethnicity to Advance a Culture of Health](#)
Source: Victor Rubin, Danielle Ngo, Angel Ross, Dalila Butler, and Nisha Balaram for PolicyLink
Type: REPORT - 74 pages
This 2018 PolicyLink report makes the case for disaggregating data by race and ethnicity to identify, track, and address racial and ethnic health disparities. The report includes guiding principles and recommendations for improving how disaggregated data about race and ethnicity are created, understood, and managed; as well as many other actionable resources and recommendations.

[By the Numbers: A Race for Results Case Study - Using Disaggregated Data to Inform Policies, Practices and Decision-making](#)
Source: The Annie E. Casey Foundation
Type: REPORT - 12 pages
This report explains the importance of collecting and analyzing disaggregated race-based data for improving policies, practices, and decision-making. It includes case studies from the W. Haywood Burns Institute and the Kirwan Institute for the Study of Race and Ethnicity.

Sub-topic 7.6: Understanding Bias in Algorithms

[Algorithmic Bias in Health Care](#)
Ziad Obermeyer, Brian Powers, Christine Vogeli, and Sendhil Mullainathan for Health Affairs
Type: BLOG - 8 minute read
This post discusses a new initiative to address bias in healthcare algorithms, algorithms and population health management, testing for bias, why bias happens, and what we can do about it.

[Artificial Intelligence: How to get it right](#)
Source:NHSX [joint unit of NHS England and Department of Health and Social Care]
Type: REPORT - 107 pages
This report gives an overview of the current state of play of data-driven technologies within the health and care system. Informed by research conducted by NHSX and other partners, it outlines where in the system artificial intelligence (AI) technologies can be utilized and the policy work required to ensure the utilization is done in a safe, effective, and ethically acceptable manner. It includes an overview of AI, an in-depth look at the governance of AI, the data that fuels AI, adoption and spread, the NHS and AI, the ongoing work for international collaboration around AI, and the NHS AI lab.

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Sub-topic 7.7: Data Sources

National Equity Atlas and the *Racial Equity Data Lab*
Source: PolicyLink
Type: DATA SOURCE
The National Equity Atlas intends to equip movement leaders and policymakers with actionable data on racial and economic equity and strategies to advance racial equity and shared prosperity. It measures indicators for demographics, economic vitality, readiness, connectedness, and economic benefits. National Equity Atlas's Racial Equity Data Lab offers a space to create data visuals and dashboards to support campaigns for racial equity and inclusive recovery.

HOPE Initiative: Measures to Advance Health and Opportunity
Source: The Health Opportunity and Equity (HOPE) Initiative
Type: DATA SOURCE
The Health Opportunity and Equity (HOPE) Initiative provides an interactive data tool including data on social determinants of health and health outcomes by race, ethnicity, and socioeconomic status. Indicators are organized into a domain for health outcomes and four domains that influence longevity and well-being.

Social Determinants of Health Action Tool
Source: IMPAQ
Type: DATA SOURCE
The Social Determinants of Health (SDoH) action tool is a data visualization tool to help organizations and individuals better understand and find solutions based on the SDoH factors (including food insecurity, neighborhood walkability, and teenage birth rates) that are affecting population health at the local level. It includes three dashboards that allow nuanced geographical analyses across SDoH variables.

Sub-topic 7.8: Theory of Change Overview

Constructing a Racial Equity Theory of Change
Source: Aspen Institute Roundtable on Community Change
Type: TOOLKIT - 60 pages
This guide provides practical tools for making racial equity operational by outlining a Racial Equity Theory of Change, including a five-step primer for tackling community problems that are marked by chronic racial inequities, and a workbook with five exercises to guide practitioners in creating their own theory of change. The guide focuses on structural racism and describes a process that encourages change leaders to investigate their explicit and implicit assumptions about the attributes of the community-level outcomes they seek.

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Center for Theory of Change
Source: Center for Theory of Change
Type: RESOURCE HUB
This site describes the process of using the Theory of Change model to describe and illustrate how a desired change will be brought about in a specific context by working backwards from long-term goals to present day interventions. The "Resources" tab includes links to presentations describing the theory of change model and its applications, including the helpful entry level presentation, "The Basics of Theory of Change," as well as examples of Theories of Change developed to address a diverse range of social problems in various cultural contexts from end-of-life care in Japan to school readiness in Pennsylvania.

Sub-topic 7.9: Examples and Case Studies: Embedding Equity in Strategic Plans and Theory of Change

American Medical Association 2021-2023 Strategic Plan
Source: American Medical Association
Type: EXAMPLE PLAN - 86 pages
This 2021-2023 strategic plan describes a vision of embedding racial justice and advancing health equity. It is the American Medical Association's first strategic plan oriented towards equity.

Center for Health Progress 2018-2020 Strategic Framework
Source: Center for Health Progress
Type: EXAMPLE PLAN - 4 pages
This 2018-2020 theory of change sets forth a vision of providing timely, high-quality and affordable health services to those who have experienced historic and systemic disparities, and includes both theories of external and internal change.

Theory of Change Advancing Health Equity in Behavioral Health Outcomes
Source: County of San Mateo Health System
Type: EXAMPLE PLAN: 17 pages
This 2018-2028 theory of change aims to advance health equity in behavioral health outcomes. The ten year plan seeks to achieve outcomes in workplace development, community empowerment, strategic partnerships, and policy and system change.

Paths Along the Way to Racial Justice: Four Foundation Case Studies
Source: Philanthropic Initiative for Racial Equity
Type: CASE STUDY: 30 pages
This report explores the journeys of four foundations working to better address the root causes of racism. The case studies highlight some of the principles, lessons and challenges of racial equity work as experienced by different types of foundations.

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*People Place and Power: Advancing Racial and Economic Equity**
Source: San Francisco Foundation
Type: CASE STUDY - 26 pages
This report describes how the San Francisco Foundation adopted equity as its north star, and embedded equity into its theory of change, strategy, and operations from 2014 to 2017.

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