

GENERAL EQUITY QUESTIONS

EQUITY	5 ALWAYS	4 OFTEN	3 SOMETIMES	2 RARELY	1 NEVER	? UNSURE
Impact Agenda: Our United Way has incorporated the needs of diverse communities we serve as part of goal setting, priority, impact strategies, and impact products.						
Impact Agenda: Our United Way has established specific goals that drive more equitable outcomes for our community (e.g. close the proficiency gap in 3rd grade reading between students by 10 percentage points by 2025).						
Stated Commitment to Equity: Our United Way has a stated commitment to equity including but not limited to an equity statement, equity vision, or some other stated, outwardly communicated equity commitment.						
Buy-in and Organizational Support: Our United Way Board is bought-in to equity as an organizational priority.						
Buy-in and Organizational Support: Our United Way leadership (executive team) is bought-in to equity as an organizational priority.						
Buy-in and Organizational Support: Our United Way staff is bought-in to equity as an organizational priority.						
Resource Allocation: Our United Way allocates resources in alignment with the principles of equity, diversity, and inclusion.						
Resource Allocation: Our United Way has invested in the training and capacity-building of our staff and leadership so that they can integrate equitable practices in their work.						
TOTAL :	____ / 40					

1. What are the areas of challenge for our United Way?
2. What are the areas of strength?
3. What are the implications of our score?
4. What specific actions might we take to improve in this equity lever?

COMMUNITY MOBILIZATION AND ENGAGEMENT QUESTIONS

COMMUNITY MOBILIZATION AND ENGAGEMENT	5 ALWAYS	4 OFTEN	3 SOMETIMES	2 RARELY	1 NEVER	? UNSURE
Our United Way has staff at all levels of leadership that reflect the demographic diversity of the communities we serve.						
Our United Way has engaged external organizations and residents to assess the degree of trust and credibility we have to create meaningful community engagement.						
Our United Way uses stories and data in our community engagement efforts to create shared community understanding about historical and current inequities.						
Our United Way uses stories and data in our community engagement efforts to compel people to action.						
Our United Way focuses our engagement activities on identifying opportunities for community action and long-term change.						
Our United Way has developed shared expectations for community engagement and assesses each engagement effort during and after it is complete.						
Our United Way compensates participants in our community engagement efforts.						
<i>Continue on the following page</i>						

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Continued

COMMUNITY MOBILIZATION AND ENGAGEMENT	5 ALWAYS	4 OFTEN	3 SOMETIMES	2 RARELY	1 NEVER	? UNSURE
<p>Our United Way regularly uses equitable convening practices in our engagement activities, such as providing food, childcare, transportation, ensuring accessibility of physical space and materials, considering the best time of day to convene, and providing multiple opportunities for participation that vary in time commitment/intensity.</p>						
<p>Our United Way has mapped relationships, institutions, and organizations in our community to understand local power dynamics, the landscape, and the cultural context in which we are operating.</p>						
<p>Our United Way partners with grassroots community leaders, affinity groups, and other community-based organizations with local credibility and strong ties to the community in our efforts to connect with and engage residents.</p>						
<p>Our United Way supports the establishment of and resources community-led decision-making bodies.</p>						
<p>Our United Way invests in building the leadership capacity of community residents.</p>						
<p>Our United Way prioritizes investment strategies and initiatives that have been informed and/or developed in collaboration with community residents.</p>						
<p>TOTAL:</p>	<p>___ / 65</p>					

COMMUNICATIONS AND AWARENESS-BUILDING QUESTIONS

COMMUNICATIONS AND AWARENESS-BUILDING	5 ALWAYS	4 OFTEN	3 SOMETIMES	2 RARELY	1 NEVER	? UNSURE
Our United Way invests in staff skills and knowledge to effectively advocate for equity through our community impact efforts.						
Our United Way normalizes and invests in the capacity of our leadership and staff to have internal conversations about inequity, structural racism and other forms of oppression.						
Our United Way communicates consistently to community residents, partners, and the general public about our organization's commitment to equity.						
Our United Way has created and publicly shared an equity commitment statement that acknowledges historical bias and creating a more equitable community as a north star.						
Our United Way creates and/or shares reports with the community that highlight present and historical disparities and links them to systemic practices, policies, community conditions.						
Our United Way leverages our corporate relationships to build their awareness about community needs and conditions.						
Our United Way carefully reviews and vets our marketing materials to ensure that we are not inadvertently perpetuating stereotypes or negative images of community residents.						
Our United Way creates materials that are accessible, relevant and meaningful to the community we are engaging.						
TOTAL: _____ / 40						

POLICY AND ADVOCACY QUESTIONS

POLICY AND ADVOCACY	5 ALWAYS	4 OFTEN	3 SOMETIMES	2 RARELY	1 NEVER	? UNSURE
Our United Way analyzes indicators with significant disparities to understand underlying, "root" causes.						
Our United Way analyzes indicators with significant disparities to determine policy and advocacy priorities.						
Our United Way advocates for specific state and local policies in childhood/youth success, economic mobility, and health that have the greatest potential for closing gaps.						
Our United Way engages community residents to identify which policies are important to them.						
Our United Way leverages our brand and network to emphasize the importance of equity in policy to policymakers.						
Our United Way shares data on state and local policies that have disparate impacts based on race/ethnicity, gender, sexual orientation, income level, and ability status with our networks (i.e. other United Ways in our state, community partners, coalitions, advocacy groups).						
Our United Way honestly assesses where equitable policies may conflict with the interests of our donors and funders and fosters discussion about that tension.						
TOTAL:	____ / 35					

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FUNDRAISING, RESOURCE ALLOCATION AND GRANTMAKING

FUNDRAISING, RESOURCE ALLOCATION + GRANTMAKING	5 ALWAYS	4 OFTEN	3 SOMETIMES	2 RARELY	1 NEVER	? UNSURE
Our United Way prioritizes advancing equity in the weighing of our grantmaking, resource allocation, and partnership decisions.						
Our United Way collects demographic data on donors.						
Our United Way develops outreach strategies for engaging new donors and leverages existing United Way affinity groups to do so.						
Our United Way engages key community constituencies to inform the grantmaking process.						
Our United Way prioritizes equity by removing funding barriers for organizations that are led by individuals who have been historically underrepresented in leadership positions, including people of color (POC), women, and individuals with disabilities.						
Our United Way prioritizes equity by removing funding barriers for organizations that are explicitly focusing on advancing equity by closing disparities that are based on racism, sexism, ability status, and income level.						
Our United Way promotes diversity, equity, and inclusion in our procurement policies for vendors we directly hire.						
TOTAL:	___ / 35					

LOCAL CAPACITY BUILDING QUESTIONS

LOCAL CAPACITY BUILDING	5 ALWAYS	4 OFTEN	3 SOMETIMES	2 RARELY	1 NEVER	? UNSURE
<p>Our United Way regularly reviews our internal resource investment and grantmaking processes to identify barriers and funding inequities between well-established, large nonprofits, and smaller organizations, especially those led by people of color and/or women.</p>						
<p>Our United Way makes strategic investments to build the capacity of local nonprofit leaders, especially women and/or people of color, focusing on networking, professional development, mentorship, and opportunities for continued growth.</p>						
<p>Our United Way uplifts and amplifies partners and businesses demonstrating their commitment to equity.</p>						
<p>Our United Way engages high-level leadership to communicate and reinforce our organizational commitment to equity.</p>						
<p>Our United Way builds the capacity of grantees and partner organizations to make equity a strategic and operational priority.</p>						
<p>TOTAL:</p>	<p>____ / 25</p>					

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