

Women's Economic Security Initiative Equity Audit Results Report



Completed for WOMEN'S WAY by Strategy Arts

WOMEN'S WAY | **CONNECTS EMPOWERS INVESTS**

WOMEN'S ECONOMIC SECURITY INITIATIVE

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INTRODUCTION

In December 2018, WOMEN'S WAY sought to further operationalize equity within their Women's Economic Security Initiative (WESI) by conducting an innovative equity audit that would examine their practices and policies. WESI wanted to create more transparency and accountability to equity of the backbone and throughout the collective. WOMEN'S WAY partnered with Strategy Arts who supported WESI through the customization and use of an equity audit tool for collective impact in discovering tactics and approaches that will translate into best practices. Given the initiative's focus of women with economic insecurity, Strategy Arts hired two women with lived experience as Equity Audit Trainees who were a part of WESI's community group to help develop the tool, conduct the audits, and facilitate a learning and improvement session. The project is anticipated to end by June 2019.

PROJECT GOALS

Uncover, recognize and change inequities that are internal to the WESI collective and provide the backbone, participants and partners and suggest actions for successfully navigating changes to continue advancing equity.

DEFINITIONS

It was crucial to have an established and clear definition of the terms that are important for this process which included "women with lived experience of financial insecurity" and "equity."

While equity can be interpreted in different ways by people, formalizing a comprehensive definition was paramount to the success of the audit. Below is the definition for equity that is being utilized for this project:

Equity is fairness achieved through systematically assessing disparities in opportunities and outcomes caused by structures and systems and by addressing these disparities through meaningful inclusion and representation of affected communities and individuals, targeted actions, and changes in institutional structures and systems to remove barriers and increase pathways to successful engagement.

WESI and other organizations in the collective understand that there is a spectrum of definitions for "financial insecurity," that can include working mothers, women who are formerly incarcerated, immigrant women, women facing medical crises or those who are recently divorced among other cases. Women can also face these struggles intersectionally, and it is also understood that women of color experience higher disparities of financial insecurity. For the purposes of this project, WESI is using the following "working definition" of women with lived experience that was co-developed with the Trainees:

Women who have the lived experience of financial insecurity are those who cannot handle an emergency of \$400 in a month because it would destabilize their lives.

WOMEN'S ECONOMIC SECURITY INITIATIVE STRUCTURE

The Women's Economic Security Initiative is a collective impact initiative that began in 2017 and aims to address women's economic insecurity in the Philadelphia region so that women can achieve financial well-being for themselves and their families. The initiative has established work groups, a steering committee and a

community group of women with lived experience called Community Conversations. WOMEN'S WAY serves as the backbone organization, providing leadership and coordination for the collective.

BACKBONE AND WORK GROUPS

From the theory of change in the Common Agenda, WESI developed the following work groups:

- Strengthening Jobs
- Changing the Narrative
- Financial Health

Each work group meets on a monthly basis and are led by two co-chairs that were elected by the group. It is written as a policy that work groups should elect at least one woman with the lived experience of financial insecurity as a co-chair. At each meeting, work group members share about how their organization is taking action to address the WESI goals. They discuss accomplishments as well as learnings about what didn't work. This dialogue allows the participants to learn from each other, problem solve and make connections for referrals and resource sharing. In addition to sharing and aligning their individual actions, each work group spearheads their own collaborative projects that contribute to their purpose. To identify the collaborative project, members evaluate the system surrounding their priority area, using what they've learned to date to determine their next course of action.

Strategy Arts customized the audit tool to assess and rate the policies and practices within this structure.

EQUITY AUDIT

The WESI Equity Audit is a new and innovative tool designed to examine and evaluate the practices and policies that are inequitable within a collective impact initiative. While collective impact initiatives are beginning to more thoroughly understand the implications of equity and diversity and inclusion, there is a definite need for there to be a more systematic method of examining and exploring how initiatives are implementing equitable practices focused on social justice. Strategy Arts outlines the methodology for creating the audit, conducting the evaluations and the resulting observations and recommendations.

WESI recruited individuals from the initiative to form an Equity Project Team to help guide the project, provide insights and feedback on the content and process, participate in the improvement session and the project initiation and project management calls.

METHODOLOGY/APPROACH

RESEARCH

Strategy Arts approached the creation of this tool by beginning with background research and a document review. We reviewed the WESI governance document, work group attendee lists and the Common Agenda. Strategy Arts conducted research on the types of equity audits that have been developed across many industries including education and corporate workplaces. We drew from research on collective impact studies, community engagement, and articles and resources that focused on community organizing evaluations, in addition to our own on-the-ground expertise implementing equitable community engagement.¹

¹ In the appendix of this report is a listing of the source materials used to create the Equity Audit content.

CUSTOMIZED AUDIT TOOL

The following seven focus areas emerged from the synopsis of the research and provided the basis of the audit tool:

- Framework
- Leadership and Structure
- Inclusive Meeting Norms/Practices
- Community Logistics
- Data Empowerment
- Advocacy for Equity
- Communications

Each focus area consists of 8-10 statements of equitable practices in engaging communities with the lived experience of the issue the collective is working to solve.

GUIDED EVALUATION

Once the content was complete, there was a thorough review process by WESI backbone staff, the Equity Project Team and the Audit Trainees. The audit was designed on the SurveyMonkey platform. Strategy Arts then recommended for each of the groups to recruit the leaders or co-chairs to participate in the 2-hour audit process. Five audits were scheduled with the leaders of each work group and the Steering Committee, and with representatives of the Community Conversations group. Given that this is a pilot and WESI had established a promise of transparency and accountability, members of the backbone were present during the audit; this also helped with providing background information that leaders of each group might not be aware of.

WESI supported the communications and meeting logistics for each audit which occurred virtually to ease scheduling and to help with costs. Participants were contacted prior to the audits about their access to technology to ensure that they could participate without barriers.

Strategy Arts conducted the audit with 2 expert facilitators. The facilitated dialogue ensured that answers are honest and not embellished to avoid uncovering inequities. Additionally, because responses can vary depending on the individual's role and demographic, Strategy Arts facilitators allowed each participant to share their individual responses to the statement; and if there were different responses, we worked to establish alignment. While this approach is more confronting than taking the audit alone, it also creates immediate learning opportunities and deepens capacity to discuss and implement equity practices even in the audit process.

EQUITY AUDIT TRAINEES

As part of this process for achieving transparency and making an impact on the issue through the audit process itself, Strategy Arts committed to hiring two women with the lived experience of financial insecurity to support the project. The women from the Community Conversations group were prioritized as recruitment prospects. Taina Estremera and Pamela Superville were hired and were paid at a professional rate for a total of 35 hours on the project. Strategy Arts and WESI implemented the project so they were empowered to work flexibly with their other obligations.

IMPROVEMENT SESSION AND ACTION PLANNING

Following this report, Strategy Arts and the Equity Audit Trainees will lead the members of the Project Team and those who participated in the audit sessions through an Improvement Session. The participants will review the audit results, prioritize areas for focus and make recommendations for action planning. Strategy Arts will use the results of the session to construct an action plan for WESI to guide their efforts to address gaps and improve equity practices over the next few years.

EQUITY AUDIT INSTRUCTIONS AND SCORING RUBRIC

INSTRUCTIONS

Each audit session had preparation communication and the session itself began with an explanation of the process. The following instructions were shared in these two steps:

- Participants were asked to set aside time to respond honestly and carefully. The audit takes approximately 2 hours to complete. Participants were provided with relevant key documents and materials for their reference including but not limited to the Governance document, Common Agenda and work group attendee lists.
- For the purpose of the equity audit, customized for your initiative, the statements use the following generalized language to avoid repetition and for brevity:

People with lived experience	means “women with the lived experience of financial insecurity”
Initiative	means the “Women’s Economic Security Initiative” or “WESI”
Group	means the steering committee or any work group that you identify yourself as part of which includes “WESI Steering Committee,” “Changing the Narrative,” “Financial Health,” “Strengthen Jobs” and “Community Conversations”

- Participants were reminded to give themselves the opportunity to breathe through hard discussions and ask questions in turn to facilitators. Facilitators allowed the discussion to take place and support the decision on the final response; sometimes there is not a right or wrong answer so gauging the group’s reaction is necessary. Facilitators supported discussions to gain agreement on responses from participants. The practices examined ones that the group itself has addressed as well as ones that are backbone responsibilities. While backbone staff was present through the assessment, participants were asked to feel free to share comments about how the group and/or the backbone can increase transparency and accountability to equitable practices. If a participant found that safe space or confidentiality felt compromised during the discussion, they were asked to share those concerns with one of the facilitators after the evaluation.

SCORING RUBRIC

Each statement had an option of the following five responses, though there were approximately 5 statements or questions that were for identification purposes only and not scored (such as name of the group or elaborating a strategy in detail for example).

Yes	Your group or initiative has implemented this strategy and continue to perform it on a continuous basis (earns 2 points).
No	Your group or initiative has not implemented this strategy (earns 0 points).
Needs improvement	Your group or initiative has implemented the strategy but not performed it on a consistent basis (earns 1 point).
Needs implementation	Your group or initiative has discussed the strategy in concept and are well-meaning to implement but have not done so as of yet (earns 1 point).
N/A	This question cannot be applied to your group or initiative based on the nature or structure of the question (this question will not be included in the score).

- The total score was be recorded as the total amount of questions and how much each question earned. Unless the question is completely out of the scope, that it is answered rather than marked N/A.) The highest score, if all questions are answered yes in the audit, is 80.
- Interpretation of the score: The higher the score, the closer an initiative is to consistent implementation of equity. These scores do not have a basis of comparison; there are no other initiatives to compare scores to at this point. They can be used to compare practices in groups within the initiative.

RESULTS AND CONSIDERATIONS

WOMEN'S WAY has had a strong commitment to equity since the beginning of WESI and has worked to include the voices of women with the lived experience of economic insecurity in all aspects of the initiative. The equity audit process is a continuation of that commitment.

The Celebrations affirm the practices that WESI has established that are already creating equity. The Considerations section contains the practices that fell into the No, Needs Improvement and Needs Implantation categories. These are organized by considerations for improvement planning that have been developed by Strategy Arts. The results broken down for each group can be found in the Appendix.

CELEBRATIONS

Celebrations are statements that had a majority of “yes” responses, indicating that a majority of the WESI groups consistently implement these practices. The following column indicates the type of responses selected by the groups.

Celebrations		
Framework	Q2: Our initiative makes a commitment to address and solve a societal issue that causes higher disparities or inequities for those who are historically underrepresented.	5-Yes
	Q3: The disparities are explicitly stated in the Common Agenda. (+Q4)	5-Yes
	Q5: People with lived experience were involved in the creation of the Vision for this initiative.	5-Yes
	Q6: Our initiative has implemented and supported a community group that involves people with lived experience impacted by the issue.	5-Yes
Leadership & Structure	Q14: Our group invites people with lived experience into leadership roles and values their input.	3-Yes 1-Implement 1-N/A
	Q15: Our group has established a policy that people with lived experience are in leadership roles.	5-Yes
Community Logistics	Q31: Our group holds meetings at convenient times for people with lived experience to attend.	3-Yes 2-Improve
	Q32: Our group holds meetings in convenient locations for people with lived experience to attend (convenient for those from the community who may experience difficulties getting to locations).	3-Yes 2-Improve
Advocacy for Equity	Q39: Our group is actively attempting to systematically find the root causes of the inequities for the problem our initiative seeks to address.	2-Yes 2-Improve 1-Implement
	Q40: Our group has had conversations about the strategies designed to benefit people with lived experience that in the past wound up being harmful.	3-Yes 1-No 1-Improve
	Q44: Our initiative's decisions about resource allocation involve a collaboration with people with lived experience.	2-Yes 2-Improve 1-Implement

CONSIDERATIONS

The following considerations are based on the reflections of the Strategy Arts team as we reviewed the results, including the observations the Equity Audit Trainees shared from the audit sessions. Below the considerations are corresponding practices from the audit and their responses to provide concrete examples of where improvements could be made.

Consideration #1

“New member” orientations that include a jargon glossary and definitions about “structural racism” and “white privilege” could be helpful

While many WESI members expressed willingness, if not eagerness, to embrace difficult conversations about race and equity, they generally agreed that further support would be helpful to facilitate those discussions.

- The creation of a new member toolkit could support group members to use the language that each work group is comfortable with while ensuring that each work group has a common understanding of terms and work group priorities.
- Beyond creating shared understanding about jargon, the glossary can serve as a reminder of words, phrases and acronyms that can create barriers, encouraging people not to use them.

Practices

Q7: Our group openly discusses “equity” and ensures all participants understand the term.	2-Yes 3-Improve
Q8: Our group openly discusses “white privilege” and ensures all participants understand the term.	1-Yes 2-No 2-Improve
Q9: Our group openly discusses “racism” and ensures all participants understand the term.	1-Yes 2-No 2-Improve
Q22: Our group refrains from using "jargon" or language that alienates or distances people with lived experience.	1-Yes 1-No 3-Improve

Consideration #2

Increased representation from women with the lived experience of financial insecurity in all the work groups

There is still a persisting feeling of “not enough” representation by women with the lived experience of financial insecurity. As noted by some of the work group leaders and the Equity Audit Trainees, the

questions about the percentage of people from the community as well as the one about tokenism were difficult to answer. Reflecting on the process for encouraging people from the Community Conversations group to participate in work groups, there is opportunity to be more intentional in the process of sharing information about the work groups, continuing to extend invitations, and asking their input for how to support their involvement.

- Intentionally increasing participation in the work groups and Steering Committee could be better supported with a graduated and detailed transition process from the Community Conversations group.
- Participation at community events could support WESI in sharing their vision and mission, and allow for potential new participants to attend a Community Conversation session where more information could be provided.

Practices

Q10: Our group has members who represent the community impacted by the issue.	2-Yes 3-Improve
Q12: Our group has an explicit goal of increasing diversity (racial and other), meaning we continuously challenge the homogeneity of the group. Homogeneity: The quality or state of being all the same or the same kind (all one race, all one gender, all one ability, etc.)	1-Yes 4-Improve
Q13: Our group refuses tokenism by ensuring there is more than one person with lived experience in our group.	2-Yes 3-Improve
Q16: Our group is making an effort to engage the full spectrum of people with lived experience by conducting targeted outreach to those who experience more barriers to participation such as those who are disabled, in poverty, immigrants, formerly incarcerated, identify as LGBT, et. al.	2-No 3-Implement
Q18: Our group understands that people with lived experience feel that there are specific organizations or individuals who might be more impactful around solutions for the issue. Our group makes an intentional effort to invite and include them.	1-Yes 3-Improve 1-Implement
Q41: Our group has sought after and actively listened to the voices of people impacted by the issue who can talk about whether or not strategies designed to benefit them, really benefit or harm them.	2-Yes 1-No 2-Improve

Consideration #3

Being proactive about meeting/community logistics could support women participating who experience more barriers

In answering these questions many respondents noted that there was not a need for these supports at this time. They had confidence that if there was a need expressed, that WESI would quickly respond to that need. The next step would be to be proactive in planning for the support and communicating that to potential participants who might automatically assume that the barriers would preclude their involvement and not express an interest, thus perpetuating their lack of involvement.

- WESI could be more proactive in offering meeting support to increase participation from those who might experience barriers whether it be due to a disability or accessibility issue, transportation, language barrier or child care.
- The job of the work groups is to be a steady ally and create systems and structures that benefit diverse people's participation without those people needing to speak up about it themselves.

Practices

Q23: Our group provides language translation when individuals need it.	4-No 1-N/A
Q24: Our group provides disability support for individuals who need it (intellectual, physical, hearing, speech or visual disabilities—support can include different accommodations.)	3-No 1-Improve 1-Implement
Q28: Our group offers paid child care for people with lived experience to attend meetings with their children.	1-Yes 3-No 1-Improve
Q29: Our group understands that transportation can be an issue and offers methods to attend meetings or reimbursement for travel (this can be marked "yes" if the compensation includes travel).	1-Yes 4-No
Q30: Our group understands the significance of an individual sacrificing meal time to attend a meeting and provides food.	2-Yes 3-Improve
Q45: Our group's communications takes into account people with lived experience who have difficulties accessing traditional modes of communication.	1-Yes 1-No 3-Improve

Consideration #4

Meeting norms should be reviewed regularly with group representatives to ensure meetings have inclusive environments and practices.

It may be difficult for individuals participating for the first time to trust WESI or feel safe in the group they are participating in. Being a woman with the lived experience of financial insecurity comes with many stigmas

and associations, therefore establishing processes and guidelines that create a safe space for them is crucial. There should always be the option for women with lived experience to not identify. However, it is important for them to feel safe to identify if they want to and participate in meetings that do not alienate them or drive them away or cause mistrust. It is also important that everyone in the group understands how to create this safe space and takes responsibility for ensuring it is maintained.

- WESI should establish a process to self-identify to increase participation of women with lived experience, as well as a policy for reviewing all meeting practices on an annual basis to renew a commitment to safe space for all group participants, especially those who experience the most barriers to participating.
- Bridging gaps in knowledge is important to ensure inclusion of all participants and to break the assumptions that jargon or using a certain language is the norm. By actively questioning the use of words and phrases and following up with explanations, the group will begin to equitably engage in meeting dialogue discussions that are productive for everyone.

Practices

Q19: In our group, there is a safe way of self-identifying as a person with lived experience so they feel comfortable sharing their status.	2-Yes 3-Improve
Q21: Our group actively addresses knowledge gaps as they arise by providing tools, explanations and follow-ups to those who need to understand.	1-Yes 1-No 3-Improve
Q26: Our group reviews meeting practices to ensure they don't cause barriers to people with lived experience at least annually.	2-Yes 1-No 1-Improve 1-Implement

Future Focus Areas

These areas should be considered after WESI implements some of the other practices through their action planning, potentially in Year 2. The following practices may have a higher impact in terms of operationalizing equity in WESI but they also vary in level of difficulty to implement them on a consistent basis.

Future Focus Areas

Q33: Our group is using institutional sources to track data (e.g. government data) in addition to sources from organizations embedded in the community.	1-Yes 1-No 1-Improve 2-Implement
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Q34: Our group is sharing data at the community-level by providing data we track to organizations working directly with people with lived experience so that communities can have better access to it.	3-No 2-Implement
Q35: Our group values community sources of data the same or more than institutional data sets (institutional data meaning government and/or administrative data, particularly as they apply to people of color.)	2-Yes 2-No 1-N/A
Q36: Our group uses asset-based framing to view data that represents people with lived experience (asset framing is the shift to narratives that define people by their aspirations and assets.)	1-Yes 1-No 2-Improve 1-N/A
Q37: Our group is prioritizing a strategy for data disaggregation; meaning we understand the importance of reading and using data broken down by population to see who is experiencing the highest disparities.	1-Yes 2-No 1-Improve 1-Implement
Q38: Our group has a strategy for educating individuals who are a part of the system on the importance of disaggregating data by populations experiencing inequity.	3-No 2-Implement
Q42: Our group has taken into account historical and current institutional oppression that cause structural sources of inequality by researching and/or presenting it in discussions.	2-Yes 2-No 1-Improve
Q43: Our group identifies and advocates for change of organizational policies or legislation that impact people with lived experience around our issue.	1-Yes 1-Improve 1-Implement 2-N/A
Q46: Our group has leveraged communication campaigns designed to increase public awareness about the issue by either educating, providing information, and/or changing social norms (answer yes, if any of those are applicable).	1-Yes 1-No 1-Improve 1-Implement 1-N/A

BY GROUP

Below is a summary of each group's audit process and total score. The full results for each group can be found in the Appendix.

Community Conversations Group

The Community Conversations group was the final audit on April 25, 2019 at 3:30 PM. Strategy Arts facilitated the equity audit with 1 trainee and combined the responses of the other trainee. The Community Conversations group accumulated 47 points.

Financial Health Work Group

The Financial Health work group audit was the first audit conducted on March 14, 2019 at 4:00 PM. Strategy Arts facilitated the equity audit along with 1 equity audit trainee. The Financial Health work group accumulated 48 points, and is the most mature work group, having had a piloted project since inception and has had long-standing members who participate consistently in the group. Participants included:

- Diane Cornman-Levy
- Camille Nickow
- Kalie Wertz
- Marian Mauti

Strengthening Jobs Work Group

The Strengthening Jobs work group audit was conducted on March 18, 2019 at 6:00 PM. Strategy Arts facilitated the equity audit along with 1 equity audit trainee. The Strengthening Jobs Work Group accumulated 32 points. This was the lowest score out of the 4 groups that were assessed. Participants included:

- Diane Cornman-Levy
- Camille Nickow
- Ellen Marshall
- Steve Evans

WESI Steering Committee

The WESI Steering Committee audit was conducted on April 1, 2019 at 4:00 PM. Strategy Arts facilitated the equity audit along with 1 equity audit trainee. The WESI Steering Committee accumulated 33 points. Participants included:

- Diane Cornman-Levy
- Hannah Savage
- Seulky McInneshein
- Alyn McCarty

Changing the Narrative Work Group

The Changing the Narrative work group audit was conducted on April 2, 2019 at 6:00 PM. Strategy Arts facilitated the equity audit along with 1 equity audit trainee. The Changing the Narrative Work Group accumulated 66 points, the highest score of the 5 groups. Participants included:

- Diane Cornman-Levy

- Camille Nickow
- Staci Moore
- Phoebe Jones

FINAL THOUGHTS

The equity audit process is designed to be in and of itself a step toward improving equity. The WESI members who participated in the process embraced that intention, fully engaging in the process, asking questions and listening deeply to each other. The learning was evident as almost all participants said “I never thought of that” or “That never occurred to me.”

As WESI moves forward with an improvement plan, it will be important that there is intention in maintaining and potentially deepening the practices highlighted in the Celebrations section. These have formed an important basis for equity in the initiative.

The next step will be to develop an action plan based on the Improvement Session and then begin implementation. This report can continue to serve as a baseline for future audits to measure progress and for continued reference of the potential practices to implement, improve or explore. The pursuit for equity is an ongoing process.

APPENDIX

AUDIT RESULTS BY GROUP

Audit Statement	Steering Committee	Community Conversations	WG – Financial Health	WG – Changing the Narrative	WG – Strengthening Jobs
Q2 Our initiative makes a commitment to address and solve a societal issue that causes higher disparities or inequities for those who are historically underrepresented.	Yes	Yes	Yes	Yes	Yes
Q3 The disparities are explicitly stated in the Common Agenda.	Yes	Yes	Yes	Yes	Yes
Q4 Please highlight the explicit statement below:	Second paragraph and disaggregated stats in first paragraph	Women of color are particularly impacted by this issue, as they face both a historically-rooted. . . to achieve financial well-being	Gender and racial disparities play a critical role of perpetuating a cycle of instability.	Highlighting poverty and the disaggregated statistics	First paragraph and second paragraph
Q5 People with lived experience were involved in the creation of the Vision for this initiative.	Yes	Yes	Yes	Yes	Yes
Q6 Our initiative has implemented and supported a community group that involves people with lived experience impacted by the issue.	Yes	Yes	Yes	Yes	Yes

Audit Statement	Steering Committee	Community Conversations	WG – Financial Health	WG – Changing the Narrative	WG – Strengthening Jobs
Q7 Our group openly discusses “equity” and ensures all participants understand the term.	Needs improvement	Yes	Needs improvement	Yes	Needs improvement
Q8 Our group openly discusses “white privilege” and ensures all participants understand the term.	No	No	Needs improvement	Yes	Needs improvement
Q9 Our group openly discusses “racism” and ensures all participants understand the term.	No	No	Needs improvement	Yes	Needs improvement
Q10 Our group has members who represent the community impacted by the issue.	Needs improvement	Yes	Needs improvement	Yes	Needs improvement
Q11 Please indicate the percentage of people with lived experience who are represented in your total group. (For example, if you have a work group of 10 people how many of those individuals have identified as people with lived experience? Then indicate the percentage. Please do not include those whom you "believe" is a person with lived experience, only include those who have self- identified.)	0-9%	75+%	10-29%	10-29%	I don't know

Audit Statement	Steering Committee	Community Conversations	WG – Financial Health	WG – Changing the Narrative	WG – Strengthening Jobs
Q12 Our group has an explicit goal of increasing diversity (racial and other), meaning we continuously challenge the homogeneity of the group. Homogeneity: The quality or state of being all the same or the same kind (all one race, all one gender, all one ability, etc.)	Needs improvement	Needs improvement	Needs improvement	Yes	Needs improvement
Q13 Our group refuses tokenism by ensuring there is more than one person with lived experience in our group.	Needs improvement	Yes	Needs improvement	Yes	Needs improvement
Q14 Our group invites people with lived experience into leadership roles and values their input.	Not Applicable	Yes	Yes	Yes	Needs improvement
Q15 Our group has established a policy that people with lived experience are in leadership roles.	Yes	Yes	Yes	Yes	Yes
Q16 Our group is making an effort to engage the full spectrum of people with lived experience by conducting targeted outreach to those who experience more barriers to participation such as those who are disabled, in poverty, immigrants, formerly incarcerated, identify as LGBT, et. al	No	Needs Implementation	Needs Implementation	Needs Implementation	No

Audit Statement	Steering Committee	Community Conversations	WG – Financial Health	WG – Changing the Narrative	WG – Strengthening Jobs
Q17 Please provide a short sample of the kind of additional outreach efforts performed:	Not Applicable	Each one, bring one concept	Not Applicable	Not Applicable	Not Applicable
Q18 Our group understands that people with lived experience feel that there are specific organizations or individuals who might be more impactful around solutions for the issue. Our group makes an intentional effort to invite and include them.	Needs improvement	Yes	Needs improvement	Needs Implementation	Needs improvement
Q19 In our group, there is a safe way of self-identifying as a person with lived experience so they feel comfortable sharing their status.	Needs improvement	Yes	Needs improvement	Yes	Needs improvement

Audit Statement	Steering Committee	Community Conversations	WG – Financial Health	WG – Changing the Narrative	WG – Strengthening Jobs
Q20 If yes, please provide details below:	We value all perspectives and aren't sure if there's a safe way to identify	We begin our meetings by letting guests and participants know that our group is founded on and stands by always creating and maintaining a "safe" for all. Naturally, because of the community conversations being made with people with live experience, we all have the opportunity to share our experience.	Speak from personal experience guidelines and the group feels safe enough to share your story. The mechanisms of being part of Community Conversations can allow people to talk about it in a safe and empowering way.	Safe space is having hard conversations and not feeling shut down. I am confident in saying what needs to be said.	Not Applicable
Q21 Our group actively addresses knowledge gaps as they arise by providing tools, explanations and follow-ups to those who need to understand.	Needs improvement	No	Needs improvement	Yes	Needs improvement
Q22 Our group refrains from using "jargon" or language that alienates or distances people with lived experience.	No	Yes	Needs improvement	Needs improvement	Needs improvement
Q23 Our group provides language translation when individuals need it.	Not Applicable	No	No	No	No

Audit Statement	Steering Committee	Community Conversations	WG – Financial Health	WG – Changing the Narrative	WG – Strengthening Jobs
Q24 Our group provides disability support for individuals who need it (intellectual, physical, hearing, speech or visual disabilities--support can include different accommodations).	Needs Implementation	No	No	No	Needs improvement
Q25 If there is support available, please provide details below:	Not Applicable	Not Applicable	Not Applicable	Not Applicable	Holding meetings in a “handicap” accessible building.
Q26 Our group reviews meeting practices to ensure they don’t cause barriers to people with lived experience at least annually:	No	Yes	Needs improvement	Yes	Needs improvement
Q27 Our group values the time/expertise of people with lived experience and compensates them for their time.	Needs improvement	No	Yes	Yes	No
Q28 Our group offers paid child care for people with lived experience to attend meetings with their children.	No	Yes	Needs improvement	No	No
Q29 Our group understands that transportation can be an issue and offers methods to attend meetings or reimbursement for travel (this can be marked "yes" if the compensation includes travel).	No	No	No	Yes	No

Audit Statement	Steering Committee	Community Conversations	WG – Financial Health	WG – Changing the Narrative	WG – Strengthening Jobs
Q30 Our group understands the significance of an individual sacrificing meal time to attend a meeting and provides food.o	Yes	Yes	Needs improvement	Needs improvement	Needs improvement
Q31 Our group holds meetings at convenient times for people with lived experience to attend.	Needs improvement	Yes	Yes	Yes	Needs improvement
Q32 Our group holds meetings in convenient locations for people with lived experience to attend (convenient for those from the community who may experience difficulties getting to locations).	Needs improvement	Yes	Needs improvement	Yes	Yes
Q33 Our group is using institutional sources to track data (e.g. government data) in addition to sources from organizations embedded in the community.	No	Needs Implementation	Needs improvement	Yes	Needs Implementation
Q34 Our group is sharing data at the community-level by providing data we track to organizations working directly with people with lived experience so that communities can have better access to it.	No	No	Needs Implementation	Needs implementation	No

Audit Statement	Steering Committee	Community Conversations	WG – Financial Health	WG – Changing the Narrative	WG – Strengthening Jobs
Q35 Our group values community sources of data the same or more than institutional data sets (institutional data meaning government and/or administrative data, particularly as they apply to people of color.)	Not Applicable	No	Yes	Yes	No
Q36 Our group uses asset-based framing to view data that represents people with lived experience (asset framing is the shift to narratives that define people by their aspirations and assets.)	Not Applicable	Yes	Needs improvement	Needs improvement	No
Q37 Our group is prioritizing a strategy for data disaggregation; meaning we understand the importance of reading and using data broken down by population to see who is experiencing the highest disparities.	Needs Implementation	No	Yes	Needs improvement	No
Q38 Our group has a strategy for educating individuals who are a part of the system on the importance of disaggregating data by populations experiencing inequity.	No	No	Needs Implementation	Needs implementation	No
Q39 Our group is actively attempting to systematically find the root causes of the inequities for the problem our initiative seeks to address.	Needs improvement	Needs Implementation	Yes	Yes	Needs improvement

Audit Statement	Steering Committee	Community Conversations	WG – Financial Health	WG – Changing the Narrative	WG – Strengthening Jobs
Q40 Our group has had conversations about the strategies designed to benefit people with lived experience that in the past wound up being harmful.	No	Yes	Yes	Yes	Needs improvement
Q41 Our group has sought after and actively listened to the voices of people impacted by the issue who can talk about whether or not strategies designed to benefit them, really benefit or harm them.	Needs improvement	Yes	Needs improvement	Yes	No
Q42 Our group has taken into account historical and current institutional oppression that cause structural sources of inequality by researching and/or presenting it in discussions.	Yes	No	Needs improvement	Yes	No
Q43 Our group identifies and advocates for change of organizational policies or legislation that impact people with lived experience around our issue.	Needs improvement	Not Applicable	Needs Implementation	Yes	Not Applicable
Q44 Our initiative's decisions about resource allocation involve a collaboration with people with lived experience.	Needs improvement	Yes	Needs Implementation	Yes	Needs improvement

Audit Statement	Steering Committee	Community Conversations	WG – Financial Health	WG – Changing the Narrative	WG – Strengthening Jobs
Q45 Our group's communications takes into account people with lived experience who have difficulties accessing traditional modes of communication.	Needs improvement	Needs improvement	Needs improvement	Yes	No
Q46 Our group has leveraged communication campaigns designed to increase public awareness about the issue by either educating, providing information, and/or changing social norms (answer yes, if any of those are applicable).	Needs improvement	No	Needs improvement	Yes	Not Applicable

TOOLS AND SOURCE MATERIALS

Below is a list of tools, resources, articles and books that were utilized in the process of building the WESI equity audit. These tools were utilized in conjunction with collective impact community engagement approaches and strategies.

- Equity in the Center. “Awake to Woke to Work: Building a Race Equity Culture.” ProInspire, 2018.
- Keleher, Terry. “Embracing Equity: 7 Steps to Advance and Embed Race Equity and Inclusion within Your Organization.” The Annie E. Casey Foundation, 2014. http://www.d5coalition.org/wp-content/uploads/2015/10/AECF_EmbracingEquity7Steps-2014.pdf
- ORS Impact, and Spark Policy. “When Collective Impact Has an Impact.” <Http://Orsimpact.com/Directory/Ci-Study-Report.htm>, 2018, orsimpact.com/directory/ci-study-report.htm.
- Potapchuk, Maggie, et al. Flipping the Script: White Privilege and Community Building. Center for Assessment and Policy Development, 2005.
- Racial Equity Impact Assessment Toolkit. www.arc.org/content/view/744/167/, June 2010.