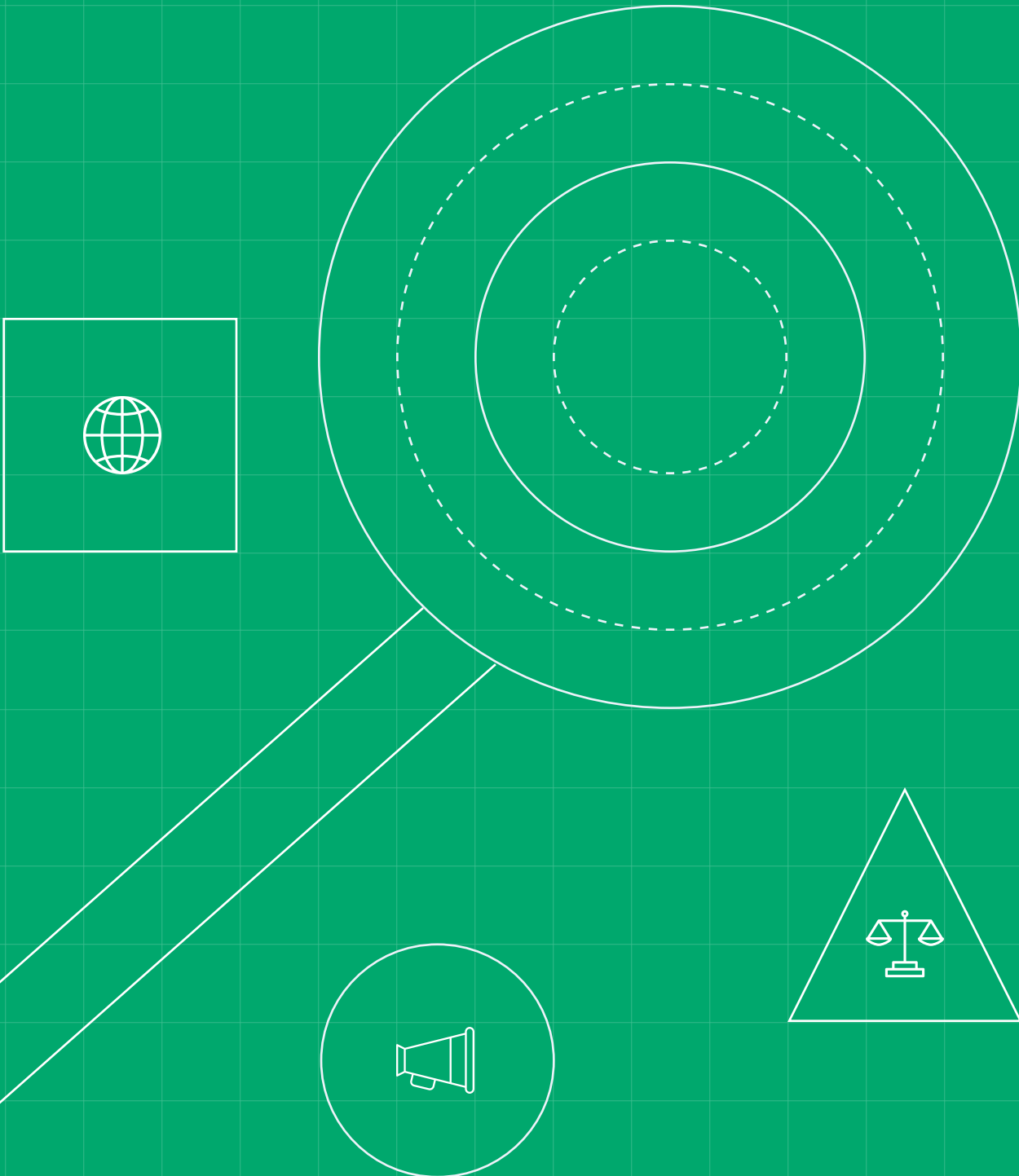


Chapter 2

Defining Equity



Why This Matters

A shared understanding of the word “equity” is valuable for multiple reasons. First, clarity on what the term means is important given its widespread use and frequent confusion with “equality.” (See [“Equity vs. Equality”](#) on next page.) Defining “equity” also helps to:

- build understanding and alignment across a range of stakeholders;
- illuminate how underlying conditions can cause disparities in outcomes, even when everyone is treated equally;
- envision what success looks like; and
- achieve specific goals and outcomes, including what actions and data are needed to track progress

Establishing a definition signals that equity matters, in terms of policies, processes, evaluation practices and outcomes. That can make it easier to communicate a commitment to different forms of equity, including racial equity, gender equity and health equity, and coordinate work that results in meaningful change.

CONSIDER

Has your government or organization defined equity? If so, how is the definition currently being used?

Governments may define equity differently based on the context in which the definition is used. But equity always involves providing individuals and groups with fair access to resources, opportunity and power, while being mindful of the particular circumstances and systemic societal barriers they face.

The federal government has defined equity as “the consistent and systematic fair, just, and impartial treatment of all individuals, including individuals who belong to underserved communities that have been denied such treatment...” For more on this and other definitions, see the “Equity Definitions in Practice” on p. 21 in this chapter.



Equity vs. Equality

Equity and equality are not the same thing – and any organization trying to advance equity must understand the difference.

Equality means all communities and individuals have the same resources, irrespective of needs.

Equity means all communities and individuals have the resources they need to thrive.

Achieving equity involves consideration of historical and systemic barriers that have existed and continue to exist in society. Efforts to advance equity in government recognize that systemic, persistent differences in experiences and outcomes among racial and ethnic groups, as well across other dimensions such as gender, geography and income, cannot be solved by focusing on equality alone.³ The following table further details differences between the concepts of equity and equality.⁴

	Equity	Equality
Guiding assumption	People can succeed when their specific needs are met. Social (including government) systems have been designed to benefit certain groups over others but can be corrected.	All people deserve the same treatment and access. This concept does not factor in historical and systemic barriers that impact groups differently.
Definition of success	A person's outcomes are not determined by their race, ethnicity, gender, income, ability or other subgroup or combination of subgroups.	A person's access is not determined by their race, ethnicity, gender, income, ability or other subgroup or combination of subgroups.
Policy example	Transportation budgets that reflect areas' specific needs for improved mobility.	Transportation budgets divided equally across a jurisdiction.

Equity Through — and in — Evaluation Practices

Evaluation is a critical tool for building knowledge and understanding of policies and programs meant to advance economic mobility and racial equity.

For example, a program designed to address an inequity may not actually do so in practice. By identifying policy or implementation shortcomings or failures as well as achievements, a well-designed evaluation can build evidence about what contributes to and dismantles inequities. It can also identify effective strategies for advancing equitable outcomes. In this way, equity is a targeted outcome that can be tracked and analyzed through evaluation. (See Chapter 6, Leveraging Evaluation Opportunities, to learn more about designing evaluations.)

Equity can also be thought of as a lens through which to critically examine evaluation policy, practices and related decisions. As you establish an evaluation policy and subsequently build evidence through it, consider how an equity definition and equity principles should be embedded throughout the work.

Examining how equity shows up in evaluation practices is important because it helps ensure that:

- community-, policy- and practitioner-relevant research questions are being prioritized;
- evaluations are designed to produce knowledge about what works, for whom and under what circumstances, including knowledge beneficial to the people most impacted by the research;
- the data collected and analyzed are high-quality, use measures appropriate to the population and help answer the research questions being asked; and
- the evaluation results and interpretations reflect real-world experiences.

CONSIDER

How might your government or organization define equity in order to distinguish it from equality? What are the implications in doing so for funding, program access, policy design and evaluation?

Common Obstacles to Centering Equity

Developing an evaluation policy and related practices that center equity is a journey with its own unique challenges. Below are common barriers to centering equity in evaluations and potential solutions to integrate into evaluation policies and practices.

CONSIDER

Has your government or organization recently conducted evaluations that examine outcomes from an equity perspective? Did you identify any historical or systemic barriers? Who else could or should be involved in the evaluation process to critically examine choices and decisions made? Have any findings been used to improve policies and programs?

Obstacle	Potential Solution
Data is not available or easily available for certain subpopulations.	Require and provide tools and support for data to be collected at subpopulation level where possible.
Data is not disaggregated by age, race, ethnicity, place/geography, socioeconomic status, gender, sexual orientation, ability and/or income.	Require and provide tools and support for data disaggregation where possible.
Evaluation activities prioritize certain outcomes, services or subgroups, thereby contributing to inequities.	Establish a shared definition of equity, and center it as a guiding evaluation policy principle.
Certain subpopulations are rarely reflected in evaluation findings, have been underserved by evaluation investments, and have been subject to harm as a result of evaluation.	Incorporate meaningful community participation in the evaluation process, including input about which questions to answer through evaluations. Investing in partnerships with key under-studied populations can facilitate robust community input.
Certain types of research methodologies are often undervalued by academia and funders as compared with practitioners.	Address the value of different research approaches in evaluation policy.

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Research questions primarily reflect the interests of funders and researchers, rather than community members impacted by a policy or program.	Incorporate meaningful community participation and input into the evaluation process, including which questions to study.
Individuals in communities being studied rarely participate in the interpretation of evaluation results and often are not aware of findings.	Include community members in the interpretation phase and share results with communities studied.

Equity Definitions in Practice

Definitions of equity can vary depending on organizational context and public policy goals. But all are rooted in the idea of providing a person or group with fair access to resources and opportunities, while considering people's unique circumstances and society's historic and systemic barriers.

The examples below offer definitions from inside and outside of government, and they describe how they support policies and programs. As you read them, consider which equity definitions are most applicable to your context and how other governments or organizations that you work with define equity.



Federal Government

The term “equity” means the consistent and systematic fair, just, and impartial treatment of all individuals, including individuals who belong to underserved communities that have been denied such treatment, such as Black, Latino, and Indigenous and Native American persons, Asian Americans and Pacific Islanders and other persons of color; members of religious minorities; lesbian, gay, bisexual, transgender, and queer (LGBTQ+) persons; persons with disabilities; persons who live in rural areas; and persons otherwise adversely affected by persistent poverty or inequality.⁵

How it is used: This definition of equity, part of a White House executive order from 2021, is used to align government-wide equity efforts and

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has been adopted across federal departments and agencies, including for assessment, strategic planning, allocating federal resources and promoting equitable delivery of government benefits. White House Executive Order [13985](#) (and, subsequently, [14091](#)) represents the first time a U.S. president affirmatively directed a whole-of-government approach to prioritizing equitable access to, and implementation of, federal programs and policies.



Dallas, Texas

The term “equity” means that each person has the resources and services necessary to thrive in each person’s own unique identities, circumstances, and histories. Equity focuses on eliminating disparities while improving outcomes for all. Racial equity is a situation that is achieved when people are thriving and neither race nor ethnicity statistically dictates, determines, or predicts one’s social outcome or ability to thrive.⁶

How it is used: Developed in response to City Council racial equity resolution no. 21-0503, this definition is part of Dallas’ first-ever [Racial Equity Plan](#), which establishes goals and actions to address the disparities that exist in Dallas. The definition is incorporated into [Dallas’ Budgeting for Equity Tool](#), which evaluates and scores each department’s budget request according to its equity impacts and alignment with the Racial Equity Plan.



Long Beach, California

“Equity” is when everyone can reach their highest level of health and potential for a successful life, regardless of their background and identity. Equity is when everyone has what they need to be successful; equality is treating everyone the same.⁷

How it is used: This definition is part of [Long Beach’s Racial Equity and Reconciliation Initiative report](#), which details 107 recommended action items to advance racial equity. The report was developed in response to 13 listening sessions and four community town halls, beginning in June 2020. Long Beach City Council voted unanimously to approve the report, which serves as the foundation for City staff to develop implementation strategies for each recommendation.

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PolicyLink

“Equity” is just and fair inclusion into a society in which all can participate, prosper, and reach their full potential.⁸

How it is used: PolicyLink’s [National Equity Atlas](#), produced in partnership with the Equity Research Institute at the University of Southern California, equips community leaders and policymakers with disaggregated equity indicators as well as policy solutions to inform their equity campaigns and initiatives.



Urban Sustainability Directors Network

The organization defines equity across four pillars:

- **Procedural equity:** *inclusive, accessible, authentic engagement and representation in processes to develop or implement sustainability programs and policies.*
- **Distributional equity:** *sustainability programs and policies result in fair distributions of benefits and burdens across all segments of a community, prioritizing those with highest need.*
- **Structural equity:** *sustainability decision-makers institutionalize accountability; decisions are made with a recognition of the historical, cultural, and institutional dynamics and structures that have routinely advantaged privileged groups in society and resulted in chronic, cumulative disadvantage for subordinated groups.*
- **Transgenerational equity:** *sustainability decisions consider generational impacts and don’t result in unfair burdens on future generations.⁹*

How it is used: The Urban Sustainability Directors Network’s [Equity in Sustainability](#) report shares good practices taking place across local governments to embed equity more fully in sustainability efforts. The report also provides recommendations for other local governments who seek to increase the impact of sustainability efforts by strengthening equity actions.

→ **For endnotes, see the full policy guide [here](#).**



Exercise 2: 10 Questions to Center Equity

Designing an evaluation that centers equity requires thoughtful attention to power dynamics, community needs and interests, and potential benefits and harms. The following questions address all stages of the evaluation process — design, execution, analysis and communication and use of findings.¹⁰

As you answer the questions, consider whether equity principles have informed work to date, and if there are opportunities to embed equity principles and goals in evaluation processes and activities going forward.

1. Who is designing the evaluation?

2. Which research questions are being asked and prioritized?

3. Does the project have potential environmental, economic, safety and/or health impact in the community? How might these differ across groups?

4. Are certain historically underserved communities more or less supportive of the project? Why?

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5. How might community involvement in development of the evaluation help it focus on what is important to communities affected by the project?

6. What data is collected and from whom?

7. Who interprets evaluation findings?

8. Who is informed about evaluation findings?

9. How are evaluation findings being used and for what purposes?

Is there a potential for harm?

10. How can the evaluation inform the government's budget and investment decisions related to equitable outcomes?