



Equitable Community Planning Toolkit

Workbook 4

Identify and Measure Outcomes

Overview

Measure Effectiveness of Interventions by Tracking Indicators

After finding the most appropriate solution to a problem and implementing it, equitable development planners should begin thinking about how best to measure outcomes of their strategies and initiatives.

Equity-focused performance metrics can be used to establish a baseline and measure progress. Once planners identify what they want to measure and how it relates to their intervention, they must focus on interpreting the results and engaging people who were affected the most.

Using metrics and indicators to inform ongoing conversation is critical, especially if it can track progress towards goals and highlight opportunities to refine strategies. This workbook includes information to **Identify Meaningful Metrics**, **Create A Process to Track Outcomes**, and **Evaluate Outcomes Through Impact**.

Workbook 4 Activities

Workbook activities include guiding questions that are designed to help you and your partners brainstorm about equity within your systems. Use these activities during an internal or community planning session and send questions to colleagues or partners to aid their thinking on the creation and implementation of a program or partnership idea.

The exercises across these activities aren't meant to be an exhaustive list of things to consider as you are planning. Instead, they are a helpful guide to centering equity within community planning and strategy work.



4.1 Identify Meaningful Metrics

Identifying meaningful metrics allows you to quantify success. Consider what you want to see changed and identify appropriate indicators to measure the impact of your initiatives.



4.2 Create A Process to Track Outcomes

Once you have identified a set of metrics, think about how to best track track them to assess progress.



4.3 Evaluate Outcomes Through Impact

Capture data to evaluate the outcomes in the community. Planning and development is an iterative process – evaluating program outcomes is a key step to knowing how to adjust future equitable community planning.

Resources

- [National Equity Atlas](#) – America's most detailed report card on racial and economic equity. The National Equity Atlas equips movement leaders and policymakers with actionable data and strategies to advance racial equity and shared prosperity.
- [Opportunity Atlas](#) – Which neighborhoods in America offer children the best chance to rise out of poverty? The Opportunity Atlas answers this question using anonymous data following 20 million Americans from childhood to their mid-30s. Now you can trace the roots of today's affluence and poverty back to the neighborhoods where people grew up.
- [The Equity Indicators](#) – A comprehensive tool developed by the CUNY Institute for State and Local Governance (ISLG) that helps cities understand and measure equality or equity in their city. It works across multiple areas (e.g., education, housing, justice) and measures the disparities faced by disadvantaged groups (those most vulnerable to inequity, such as racial and ethnic minorities, immigrants, or individuals living in poverty) across those domains on a regular basis, tracking change over time.
- [Tactical Guide: Inclusive Small Business Support](#) – Produced by Local Initiatives Support Corporation (LISC) identifies useful data to measure program outcomes that target minority owned businesses.
- [Creating A Culture of Diversity, Equity, and Inclusion](#) – Produced by the Society of Human Resources Management and Harvard Business Review, this report chronicles important internal metrics that organizations can use to track progress toward Diversity, Equity, and Inclusion goals.
- [Changing Workforce Systems](#) – A framework by the Urban Institute for adopting and tracking workforce systems change goals, and tools for thinking through measurement practices for initiatives.
- [Equitable Growth Framework](#) – Adopted by the City of Charlotte for measuring access, environmental justice and equity for residents and businesses who may not have access to daily needs, choices for housing, a diversity of employment, or safe and healthy environments.



We're here to help and be a partner in this work!

Need assistance? Have success stories or additional resources to share?

Please email us at engage@fourtheconomy.com with questions or suggestions as your community completes the equitable planning workbooks.

Example Metrics

- **Internal/Program Metrics**
 - Number of community meetings/events hosted, attendees
 - Number of partners engaged/partnerships created
 - Number of businesses reached/engaged through marketing/outreach
 - Number of individuals/businesses supported
- **Engagement/Inclusion Metrics**
 - Type of engagement opportunities provided
 - Community members from underrepresented groups engaged
 - Number/percent satisfied with community engagement
 - Number/percent of community who feel community engagement strategies were effective
- **System/Community Asset Metrics**
 - Presence of effective coordinating bodies
 - Quantity and quality of partnerships
 - Plans for continued partnership among system actors
 - Joint decision-making between key stakeholders
- **Economic Development Metrics**
 - *Industry Data* - employment and wages by industry, labor force data, employment growth, industry data by race/ethnicity and gender
 - *Employment Opportunities* - wage growth, living wage jobs, access to career pathways
 - *Small Business* - ownership, minority and women owned businesses, employment, revenue, openings, closing, and expansions, credit availability
 - *Talent* - educational attainment, training, learning, and development programming, access to workforce development opportunities
 - *Entrepreneurship* - business starts, access to capital, presence of community development financial institution or research institutions
 - *Housing/Real Estate Development* - building permits, ownership, age and quality of housing stock, presence of workforce or affordable housing, vacancy rates
 - *Quality of Life* - level of community investment, access to childcare, internet connectivity, community facilities, health care, fresh food, parks, open spaces, and trails public spaces

Identify Meaningful Metrics

Using the Resources and Example Metrics on the previous pages, identify meaningful measurements that allow you to quantify success. Consider what you want to see changed and identify appropriate indicators to measure the impact of your initiatives. Reference the resource on the previous page to help answer what type of broad and specific indicators could serve as meaningful metrics.

What problem(s) are you seeking to address?	What broad types of metrics should you use to measure progress? <i>E.g. Internal/Program, Engagement/Inclusion, System/Community Asset, or Economic Development Domains, etc.</i>	What specific indicator will help you measure progress towards your goal? <i>E.g. Wages, access to jobs or workforce training, growth, ownership, etc.</i>

Create A Process to Track Outcomes

Once you have identified a set of metrics, think about how to best track them to assess progress. Planning organizations should track goals with regularity and communicate outcomes and findings. Transparency with respect to monitoring equity strategies is important – highlighting indicators that have not progressed as quickly to a stated goal can help direct additional resources towards that effort, or help adjust the overall strategy.

What specific indicator will help you measure progress towards your goal? [Complete an entry for each indicator identified in the previous activity]	How often does it make sense to update or track the indicator? E.g. Quarterly, on an annual basis, every two years, etc.	Who will you share the metrics with, and in what format? E.g. Internal, metrics review with partners, public reporting, data served on a website, etc.

Evaluate Outcomes Through Impact

Capture data to evaluate how the community has been affected by outcomes. Planning and development is an iterative process – evaluating program outcomes is a key step to knowing how to adjust future equitable community planning. Equity work takes time and meaningful change is hard. Communities, through data and conversation, should first establish a baseline and then regularly evaluate where they are, how they are doing, if they are being successful, and what might be missing.

How will partners work together to evaluate goals and strategies of the shared vision?				
Goal/Outcome	Method/Strategy	Partners Needed to Evaluate Strategy	Information Needed to Evaluate Strategy	Time Interval Needed to Evaluate Strategy
1.				
2.				
3.				
4.				
5.				

Pause and Reflect



In this workbook you have identified metrics and established a process for tracking and measuring outcomes. As you continue, consider the following questions:

How will your working group use metrics and indicators to encourage accountability in continuing to advance your efforts?

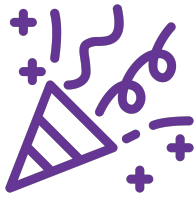
How will you communicate your progress and outcomes to the community in a transparent and accessible way?



Congratulations!

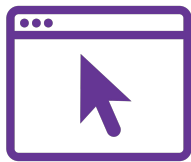
You've completed the Equitable Development Toolkit

Next Up



Share your story

How did you use the Toolkit? We'd love to know! Contact us at engage@fourtheconomy.com to share your story.



Follow our Advancing Equity blog series

Our Advancing Equity series shares resources, promising practices, and success stories to inform and inspire. Visit fourtheconomy.com/advancing-equity for more information.



Continue to review, evaluate, and adjust approaches and strategies

Creating change is an ongoing process. Re-visit your work periodically to assess what's working and what needs to be adjusted to reflect a changing environment.