Equitable Community Planning Toolkit

Workbook 1

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Establish a Baseline

To know where you are going, you need to start by understanding where you are. A number of national think tanks operate tracking and mapping tools to help communities understand where they fall on a series of metrics around racial and economic inclusion. PolicyLink and the USC Equity Research Institute publish the **National Equity Atlas** which provides a broad array of data for the largest 100 cities, the largest 150 regions, and all 50 states. Harvard and Brown's **Opportunity Atlas**, and the **Equality Indicators** from the Institute of State and Local Governance both provide data that can help inform policy. The **Urban Institute** also ranked the largest metros in the United States on inclusion policies and programs.

Using data to inform conversation is critical, especially if it can concretely identify and quantify realities about your community that may not be apparent at face value. This workbook includes information to **Diagnose The Problem**. Once you've established a baseline, you can then **Identify Your Strengths**, and **Draft Your Goals**.

Workbook 1 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.

1.1 Diagnose the Problem

Brainstorm the problems of the community as you understand them using the quantitative and qualitative data available to you. Consider how the elements of existing systems lead to or perpetuate these problems. Consider who is benefiting and who is excluded or harmed from existing systems.

1.2 Identify Your Strengths

Consider what's working well and why. Evaluate whether everyone is benefiting from these strengths or if certain community members are being excluded from or harmed by perceived strengths.

1.3 Draft Your Goals

Based on your understanding of the community's existing systems and the problems and strengths you identified, prioritize which problem(s) you seek to address. Draft your goals related to these priorities.

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.

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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.

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Diagnose the Problem

Brainstorm the problems of the community as you understand them using the quantitative and qualitative data available to you, including the data sources outlined above. Use the questions below to guide you and use the table to record your ideas.

What problem(s) are you seeking to address? What communities or target populations are affected?	How do the goals, programs, policies, etc. of existing systems lead to or perpetuate this core issue?	Is the work of existing systems missing a targeted community? Who is benefiting? Who is excluded? Who is harmed?	What data or metrics validate this?

Identify Your Strengths

Now consider what your community has been able to leverage to find success using the quantitative and qualitative data available to you. Consider what's working well and why.

What has your community been able to leverage to find success in addressing the problem. What's working?	How do the goals, programs, policies, etc. of existing systems lead to or perpetuate this core issue?	Is the work of existing systems missing a targeted community? Who is benefiting? Who is excluded? Who is harmed?	What data or metrics validate this?

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Identify Your Goals

Based on your understanding of the community's current systems and the problems and strengths you identified, prioritize which problem(s) you seek to address. Draft your goals related to these priorities.

What goals do you have related to the prioritized problems you are seeking to address?	Check To Make Sure You Goals are "SMART"				
	Specific Well defined, clear, and unambiguous	**Measureable** Specific criteria to track progress	**Actionable** Activity that can be accomplished	**Realistic** Within reach, and relevant to goal	**Timely** With a clearly defined target date

Pause and Reflect

In this workbook you have established a baseline understanding of the problems you wish to address, identified your strengths and resources, and set initial goals for your work. As you continue, consider the following questions:

Were you surprised by any findings from the baseline analysis? Do the most pressing problems identified from the baseline analysis match what you expected?

Did initial conversations around your communities' strengths and priorities generate goals that align with stakeholders in your community?
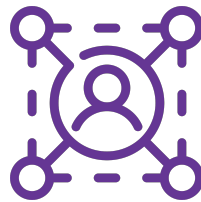
Congratulations!

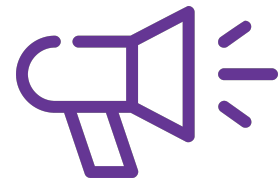You've completed the activities in Workbook 1

Next Up

Workbook 2: Identify and Engage with Community Members

Identify Partners and Community Members You Need to Engage

Understand Partner Roles

Engage Partners and the Broader Community

Keep In Mind: Equity work is an ongoing process. Planning and implementing change is iterative and will likely need to be refined and updated as you progress through the framework and engage community members.

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