



WE ALL  
COUNT

# WORKBOOK

# THE SEVEN STEPS OF THE DATA EQUITY FRAMEWORK



**1. Funding**



**2. Motivation**



**3. Project Design**



**4. Data Collection & Distribution**



**5. Analysis**



**6. Interpretation**



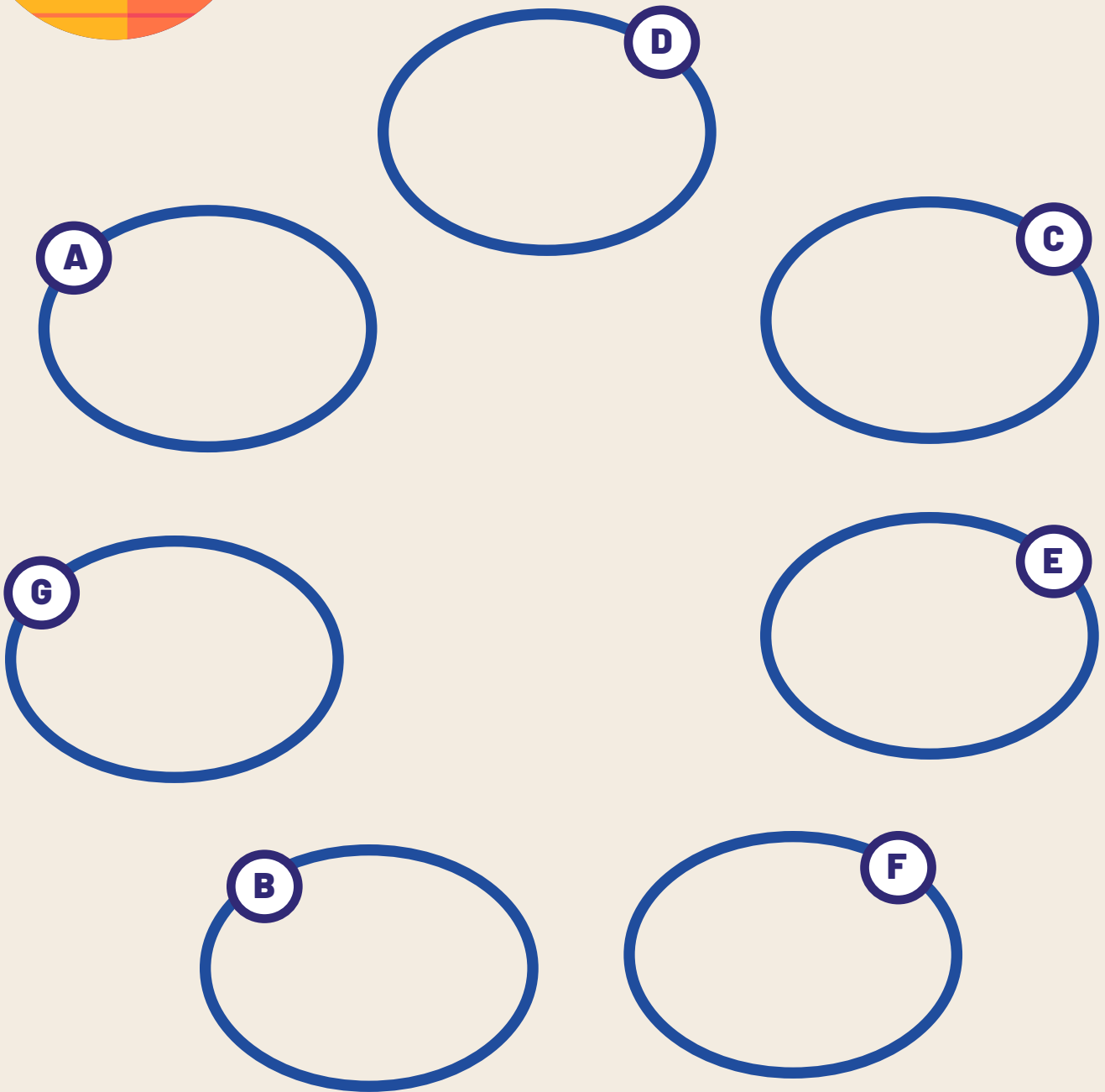
**7. Communication & Distribution**



# FUNDING

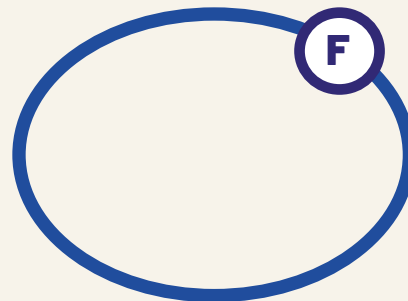
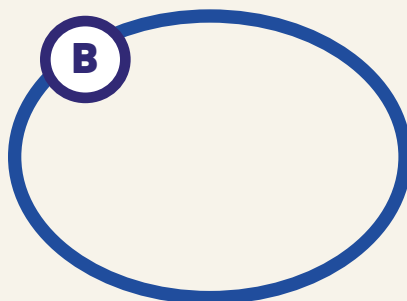
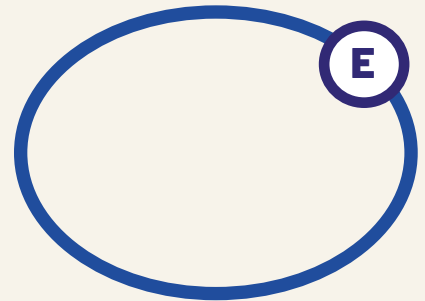
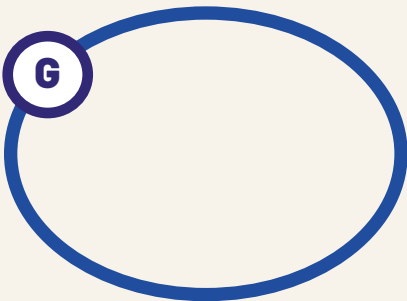
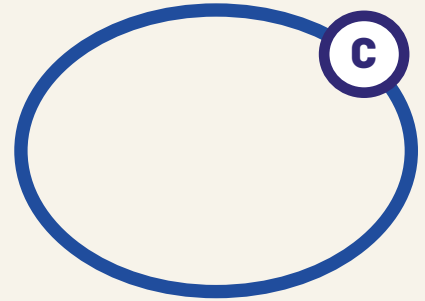
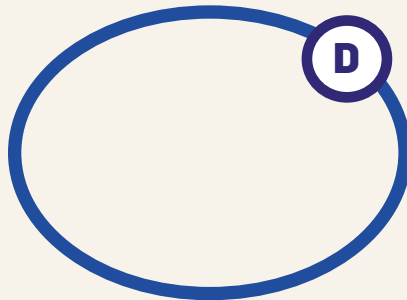
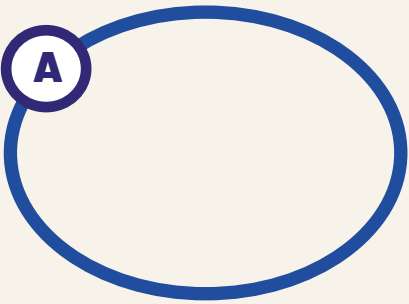


# FUNDING WEB





# FUNDING WEB





# FUNDING STATEMENT COMPONENTS

A

B

C

D

E

F

G



## **MOTIVATION STEP**

**In order to effectively make decisions we need to get clear on exactly what our mission is. Why are we going to the moon? What are we hoping to accomplish?**



Before we can design a successful impact measurement project we need to very **carefully define what constitutes “success”**.

Before we can design an equitable measure of impact, we need to examine **whose definition of success we are using**.



# First Step:

**Identify the perspectives we want to prioritize when making the rest of our definitions and decisions:**

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# Second Step:

Let's identify the key words in our statement:

**To improve the current  
financial health experienced by  
the young women of Chicago.**



# Second Step:

Let's identify the key words in our statement:

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# Third Step:

Let's assign each key words in our statement to "Exploring" or "Accepted":

## ACCEPTED

Accepted means that your project is locking in a definition for this element. You know who has defined it and are comfortable explaining how/why you accepted this definition.

## EXPLORING

Exploring means that you are going to continue to examine multiple or alternate definitions for these terms, or that you simply haven't locked in a definition yet.

# ACCEPTED

Accepted means that your project is locking in a definition for this element. You know who has defined it and are comfortable explaining how/why you accepted this definition.

# EXPLORING

Exploring means that you are going to continue to examine multiple or alternate definitions for these terms, or that you simply haven't locked in a definition yet.

Term	Definition	Origin	Status
"Improve"	Population average increase.	The key metric as identified by WC Bank.	<b>EXPLORING</b>
"Young"	?	?	<b>EXPLORING</b>
"Financial Health"	Credit Score benchmarks from poor to excellent.	The key metric as identified by WC Bank.	<b>EXPLORING</b>
"Women"	Respondent self-identifies as a woman.	This definition was developed in consultation with our DEI consultant.	<b>ACCEPTED</b>
"Chicago"	Residents with zip codes starting in 606	This is the municipal government's definition of Chicago.	<b>ACCEPTED</b>



**We aim to center perspectives of \_\_\_\_\_ ,  
\_\_\_\_\_, and \_\_\_\_\_ when making  
decisions and defining success.**

**Our core impact statement is:**

<b>Term</b>	<b>Definition</b>	<b>Origin</b>	<b>Status</b>
			<b>EXPLORING/ ACCEPTED</b>
			<b>EXPLORING/ ACCEPTED</b>
			<b>EXPLORING/ ACCEPTED</b>
			<b>EXPLORING/ ACCEPTED</b>
			<b>EXPLORING/ ACCEPTED</b>



# Fourth Step:

## Make a List of Rewards



### Rewards

**Organizational:**

**Team:**

**Personal:**



# **Fifth Step:**

## **Make a List of Restrictions**



**Time**

**Money**

**Capacity**

**Rules & Regulations**

# **Sixth Step:**

## **Put it together in a Motivation Touchstone.**

**This project is being undertaken by \_\_\_\_\_**

**We aim to center perspectives of \_\_\_\_\_ , \_\_\_\_\_ , and \_\_\_\_\_ when making decisions and defining success.**

**Our core impact statement is: To improve the current financial health experienced by the young women of Chicago.**

### **DEFINITIONS:**

- **By “improve” we mean \_\_\_\_\_**
- **“Financial health”: we are exploring credit scores as an indicator of financial health, which is a definition provided by our partner W.C. Bank and will explore additional/alternate definitions as well.**
- **We are still exploring the way that we will define “young” and hope to prioritize the views of the women in our program.**
- **ETC.**



# **Sixth Step:**

## **Put it together in a Motivation Touchstone.**

### **REWARDS:**

**In addition to achieving our core motivation, this project will be considered a success if:**

- 
- 
- 
- 

**Though not critical success criteria, we will aim for this project to:**

- 
- 
- 
- 
- **Etc.**



# **Sixth Step:**

## **Put it together in a Motivation Touchstone.**

### **RESTRICTIONS:**

**This project aims to accomplish the following within a budget of \_\_\_\_\_ , which represents the combination of the grant and the internally allocated funds.**

**This project has a deadline of \_\_\_\_\_, because \_\_\_\_\_**

**This project is limited by our capacity in \_\_\_\_\_ area, \_\_\_\_\_ area, and \_\_\_\_\_ area.**

**We will be pursuing this project within the internal guidelines of our organization, \_\_\_\_\_ ethical framework, and \_\_\_\_\_ relevant laws and privacy regulations.**





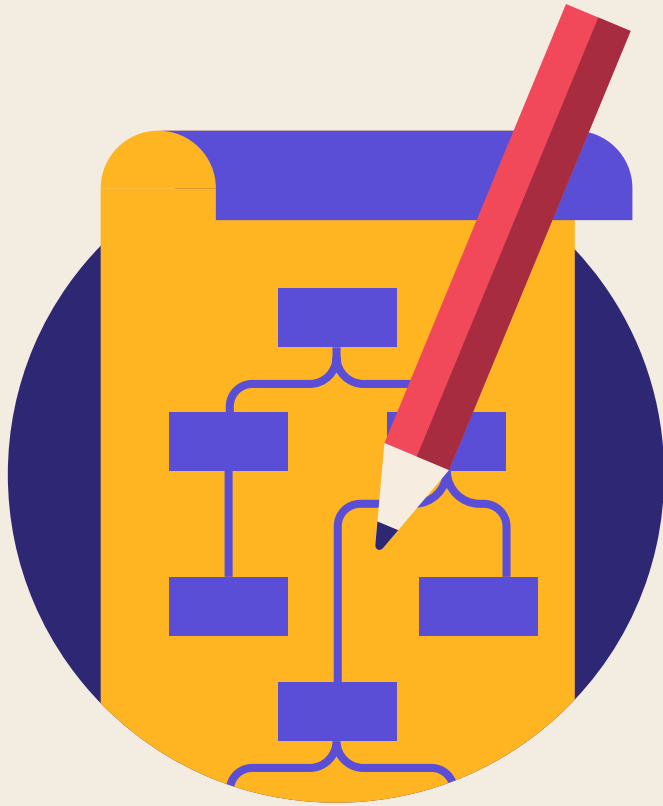
## **BENEFITS OF A MOTIVATION TOUCHSTONE?**

### **Private:**

Touchstone  
Clarity  
Trust  
Morale

### **Public:**

Engagement  
Trust  
Transparency



# **Impact From Whose Point of View?**

## **The Perspective Microscope Tools**

**Perspective - who's point of view are we asking from**

**Impact Question - what do we want to know**

**Data Source - where might we find some answers**



# Who should we put in the boxes?

City Government

Large Foundation

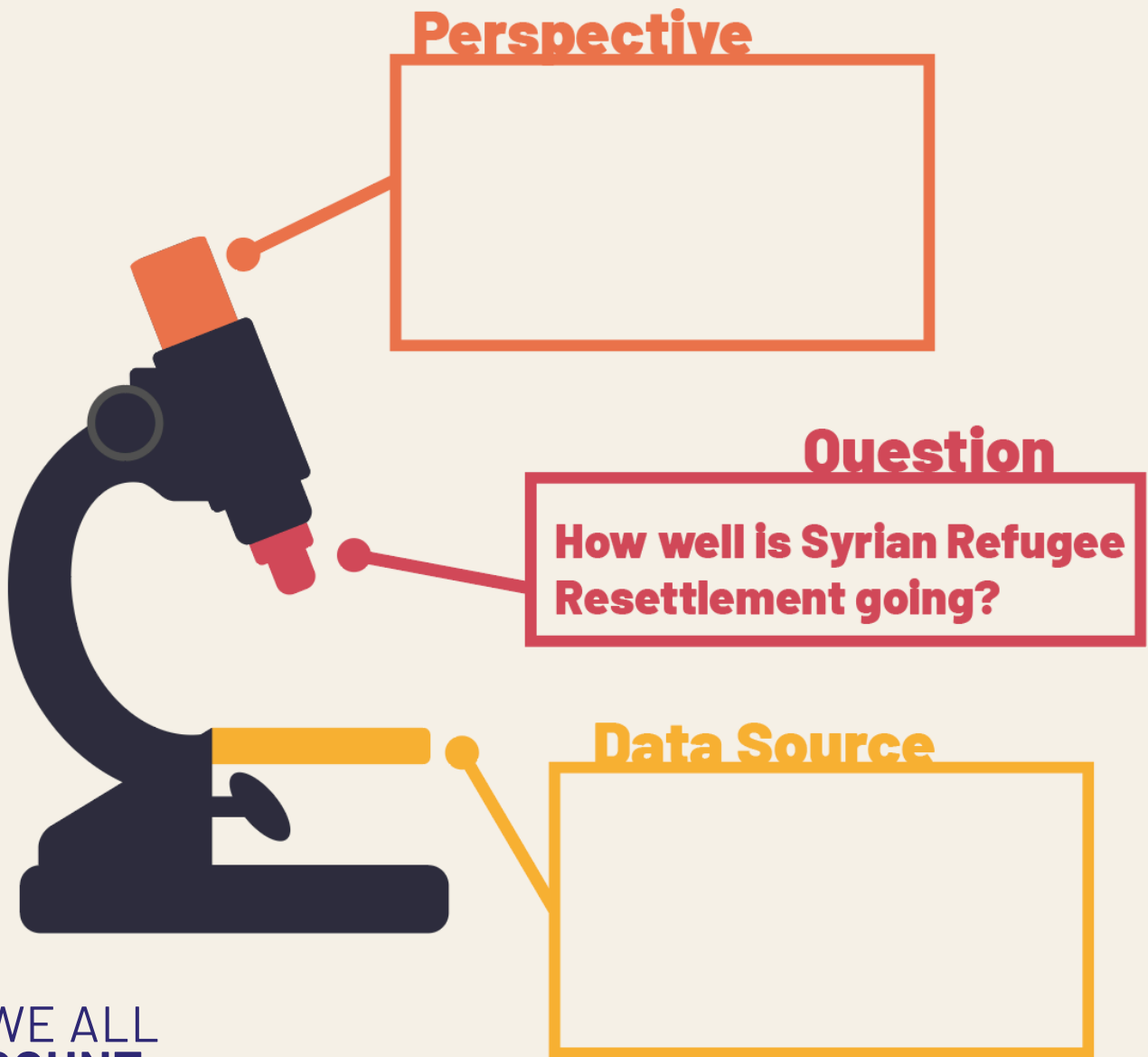
National Government

National Non-Profit

Local Non-Profit

Non-Refugee City Residents

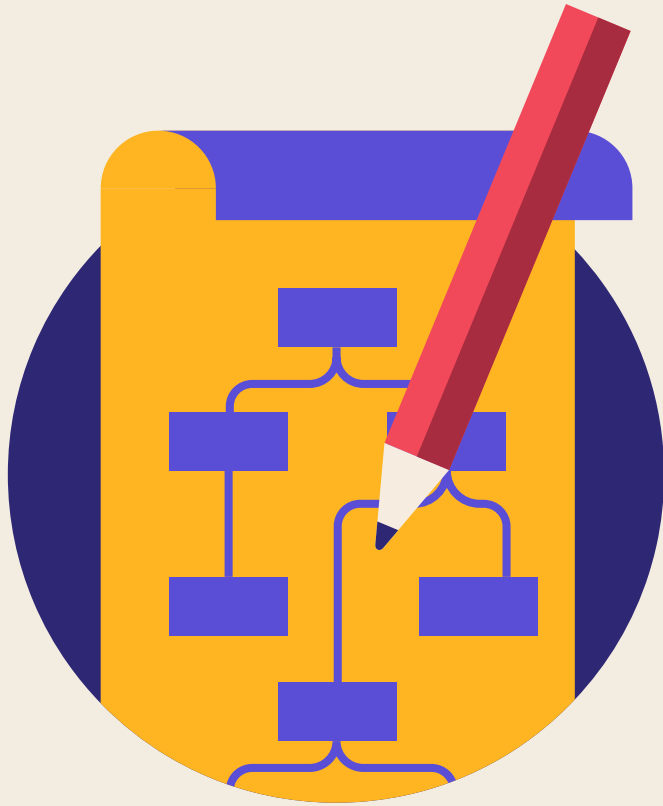
Syrian Refugees



**Make a list of your key stakeholders and constituents.**

**Take turns moving them into different lenses.**





# **Assessing Your Research Question for Equity**

## **Three Fundamental Questions**



## **Three key questions to assess research questions for equity:**

- 1. Where is the onus to change?**
- 2. What is the definition of success?**
- 3. Whose perspective is embedded in each of these?**

~~**“Which of our two investments are working best to change the trends in Black, Indigenous and Hispanic male dropout rates compared to White male students?”**~~

- 1. Where is the onus to change?**
- 2. What is the definition of success?**
- 3. Whose perspective is embedded in each of these?**

**“How much are our investments effective in removing the barriers we put up to Black, Indigenous and Hispanic boys remaining in school in our district?”**



Impact Question

Where is the onus to change?

What is the definition of success?

Whose perspective is embedded in each of these?



**Now that you've settled on your research question, make sure you select a methodology that matches your research question.**

**You can use the Methodology Matrix to start.**



# DATA COLLECTION

# Getting started with social identity data.

Four key questions we need to be able to answer when starting to collect social identity data:

1. What exactly are you trying to understand?
2. Who is accruing value from this data collection?
3. Who is accruing risk from this data collection?
4. Who gets to make decisions about this data collection?

## **1. It is essential to know why you need social identity data before we can even talk about how and when to collect it**

What exactly are you trying to understand?

A person's experience?

A system's creation of marginalization?

A person's biological needs?

Current economic marginalization?

A person's program and service needs?

Collect social identity that can help you answer these questions. Use as few proxies as possible.



# Getting started with social identity data.

**2. When collecting social identity data, the people who are accruing value from this data should include the people you are collecting data from.**

How can you ensure this? Check your assumptions with the people you are collecting data from.

Think carefully about the groups of people you want to create. Think carefully about the divisions you want to perpetuate.

Anything that is devoted to dividing people into groups is vulnerable to increasing division and eventually will break down into small sample sizes that don't hold value and power.



# Getting started with social identity data.

## **3. When collecting social identity data, many different people and organizations are being exposed to risk.**

Quantify and optimize that risk to align with your equity goals.  
Be transparent about the risk.  
Have actual accountability structures in place.

Think carefully about the groups of people you want to create. Think carefully about the divisions you want to perpetuate.

Anything that is devoted to dividing people into groups is vulnerable to increasing division and eventually will break down into small sample sizes that don't hold value and power.

## **4. When collecting social identity data, we are forming relationships, we are agreeing to a social contract. Contracts need to be very clear on value, price, profit, and ownership.**

Get clear about what data contract you are establishing.  
Ensure that all parties are also clear about that.  
Check that these relationships align with your equity goals.

# Demographic & Social Identity Data

For each social identity variable, list the following:

**Variable #1:** \_\_\_\_\_

**Who defines the categories?**

**What categories are there?**

**Who makes the selection?**

**What was selected?**

**Variable #2:** \_\_\_\_\_

**Who defines the categories?**

**What categories are there?**

**Who makes the selection?**

**What was selected?**

**Variable #3:** \_\_\_\_\_

**Who defines the categories?**

**What categories are there?**

**Who makes the selection?**

**What was selected?**

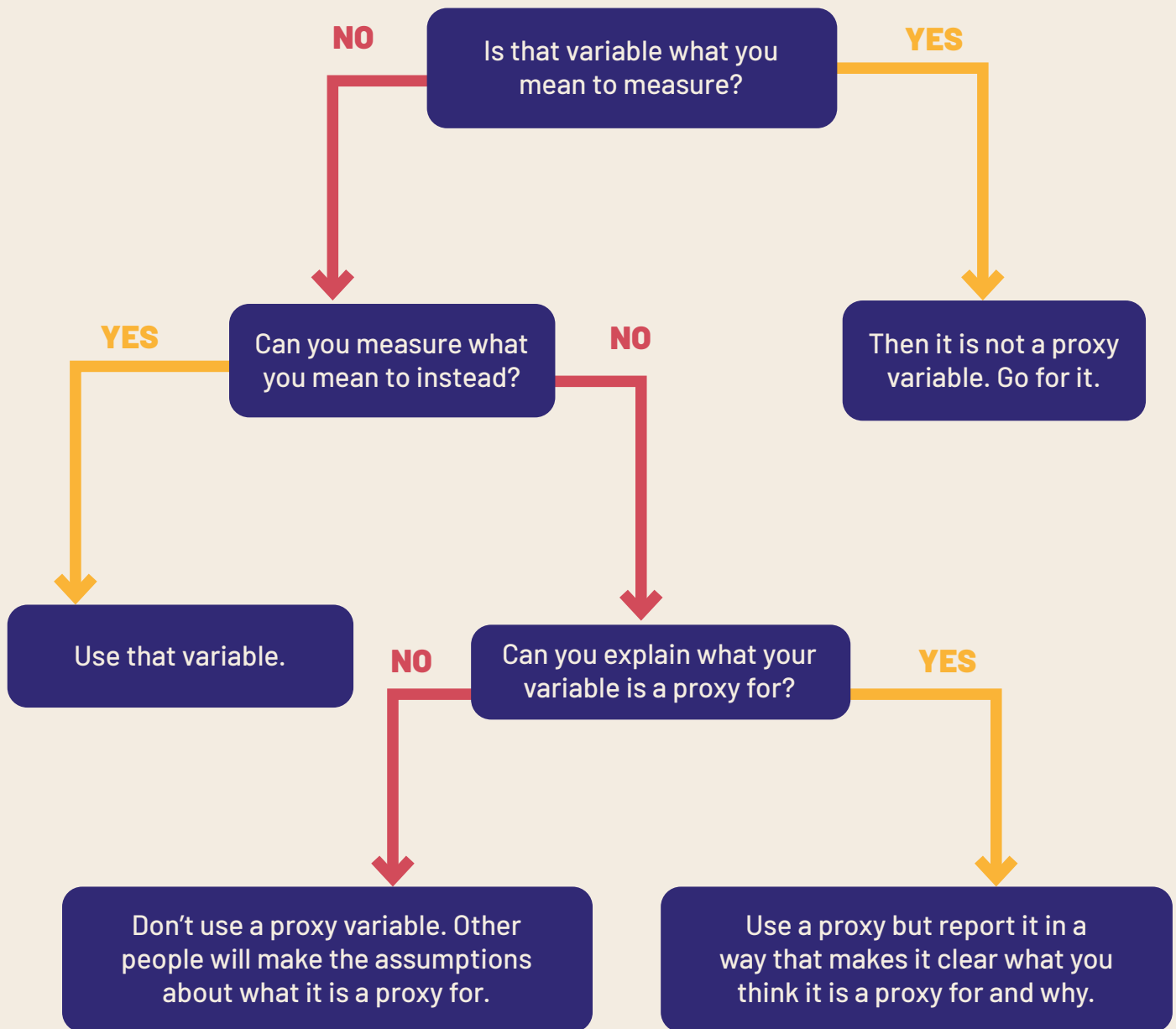
**INTERSECTIONALITY**

**PROXY VARIABLES**

**SMALL SAMPLE SIZES**



# Are you using a proxy?





# ANALYSIS

# What kind of analysis are you looking for?

I want to make a statement about the current state of something.

**(Descriptive)**

I want to make a statement about what will happen.

**(Predictive)**

I want to make a statement about why/how something is happening.

**(Causal)**

# What kind of statement do you need to make?

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I want to make a statement about the current state of something.

**(Descriptive)**

I want to make a statement about what will happen.

**(Predictive)**

I want to make a statement about why/how something is happening.

**(Causal)**

# Descriptive Analysis:

## Equity key choice point #1:

Choosing your denominator.

If I say that 8 out of 10 students graduated...

10 what? 10 when? 10 who?

The choice of denominator embeds a specific worldview.



# Descriptive Analysis:

## Equity key choice point #1:

How did you choose your denominator?



# Predictive Analytics:

## Equity key choice point:

Decide on your tolerance for the difference in how well your model predicts for each of the equity groups you are focusing on.

**In your project, what is the relative potential impact of each of these possible outcomes?**

<b>TRUE POSITIVE:</b> Predicted to graduate &	<b>FALSE POSITIVE:</b> Predicted to graduate
<b>FALSE NEGATIVE:</b> Predicted to not	<b>TRUE NEGATIVE:</b> Predicted to not graduate &

# Predictive Analytics:

## Equity key choice point:

**Decide on your tolerance for the difference in how well your model predicts for each of the equity groups you are focusing on.**

Variable	Accuracy	Specificity	Sensitivity	Other Metrics

# Causal Analysis:

## Equity key choice point:

**Choose whose perspective is reflected in the way that your variables relate to each other in the model.**

**Each of these choices will create different results.**

# Causal Analysis:

**There are three basic ways to include a variable in a model:**

**CONFOUNDER:** *"I think time spent studying affects both whether or not someone is in math club and whether or not they will graduate, so I'll account for its effect by holding it steady."*

**MEDIATOR:** *"I think being in a math club leads to more studying, which in turn affects the likelihood of graduation, so I'll account for it by linking the Math Club involvement to time spent studying."*

**MODERATOR:** *"I think students who study less will benefit more from math club than students who already study a lot, so I'll account for it by reflecting that the effect of math club is dependent on time spent studying."*

# Causal Analysis:

**How can you include select variables in your model?:**

**CONFOUNDER:** *"I think ....."*

**MEDIATOR:** *"I think ....."*

**MODERATOR:** *"I think ....."*



## **Causal Analysis:**

**How can you include select variables in your model?**

**CONFOUNDER:** *"I think ....."*

**MEDIATOR:** *"I think ....."*

**MODERATOR:** *"I think ....."*

**HOW CAN WE USE  
EQUITY AS THE DRIVER  
OF THIS CHOICE?**



# INTERPRETATION

# RESULTS

**The output of an analysis or calculation in the form of numbers.**

**It has no *meaning*, values or implications in this form.**

# INTERPRETATIONS

**The meanings that can be taken from the numbers based on the process that produced the numbers.**

# NARRATIVES

**The implications of the interpretations from a perspective and in a context.**

**Sometimes includes a recommendation.**

# RESULTS

**What are the numbers?**

# INTERPRETATIONS

**What do the numbers mean?**

# NARRATIVES

**Is that good or bad? For who?**

**What should we do based on this meaning?**

## What are your RESULTS?

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## What possible INTERPRETATIONS are you considering?

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## What possible NARRATIVES are you considering?

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# What possible INTERPRETATIONS are you considering?

## 1: Definition Match

*We wanted to understand circles, but now we're talking about squares in our interpretation.*

## 2: Relevance Match

*We wanted to create meaning for yellow circles, but we're applying it to red ones in our interpretation.*

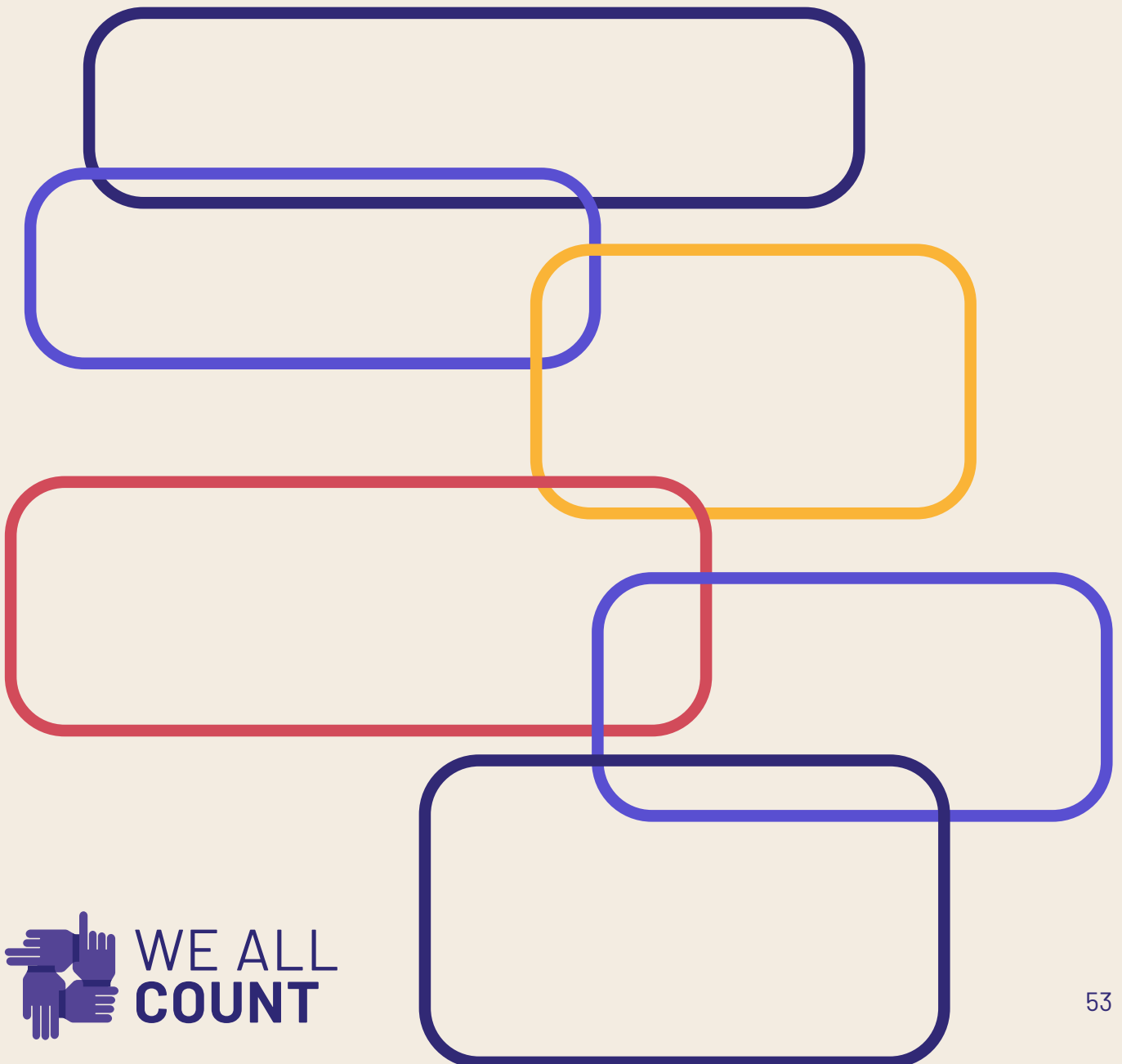
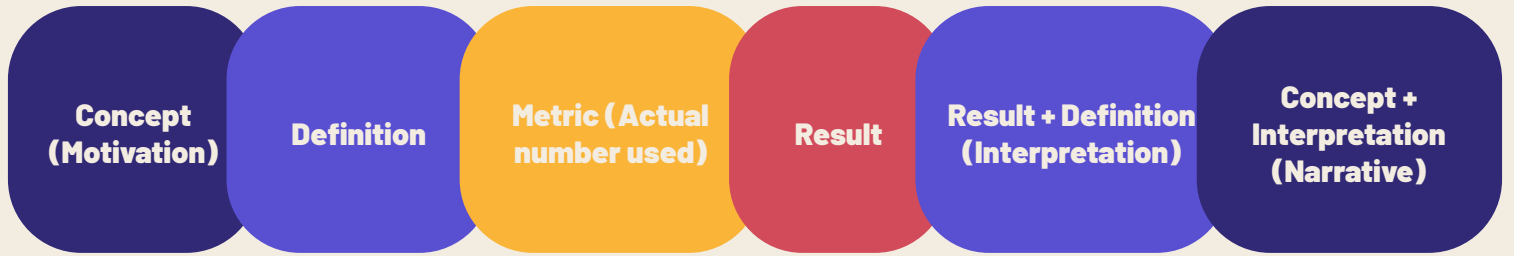
## 3: Technique Match

*We can only solidly say so much based on our methods. If we jump beyond that, our interpretation will be hollow.*

## 4: Certainty Match

*We have arrived at a specific range of certainty. Does the clarity we actually have match what we're saying in our interpretation?*

# Definition Chain:



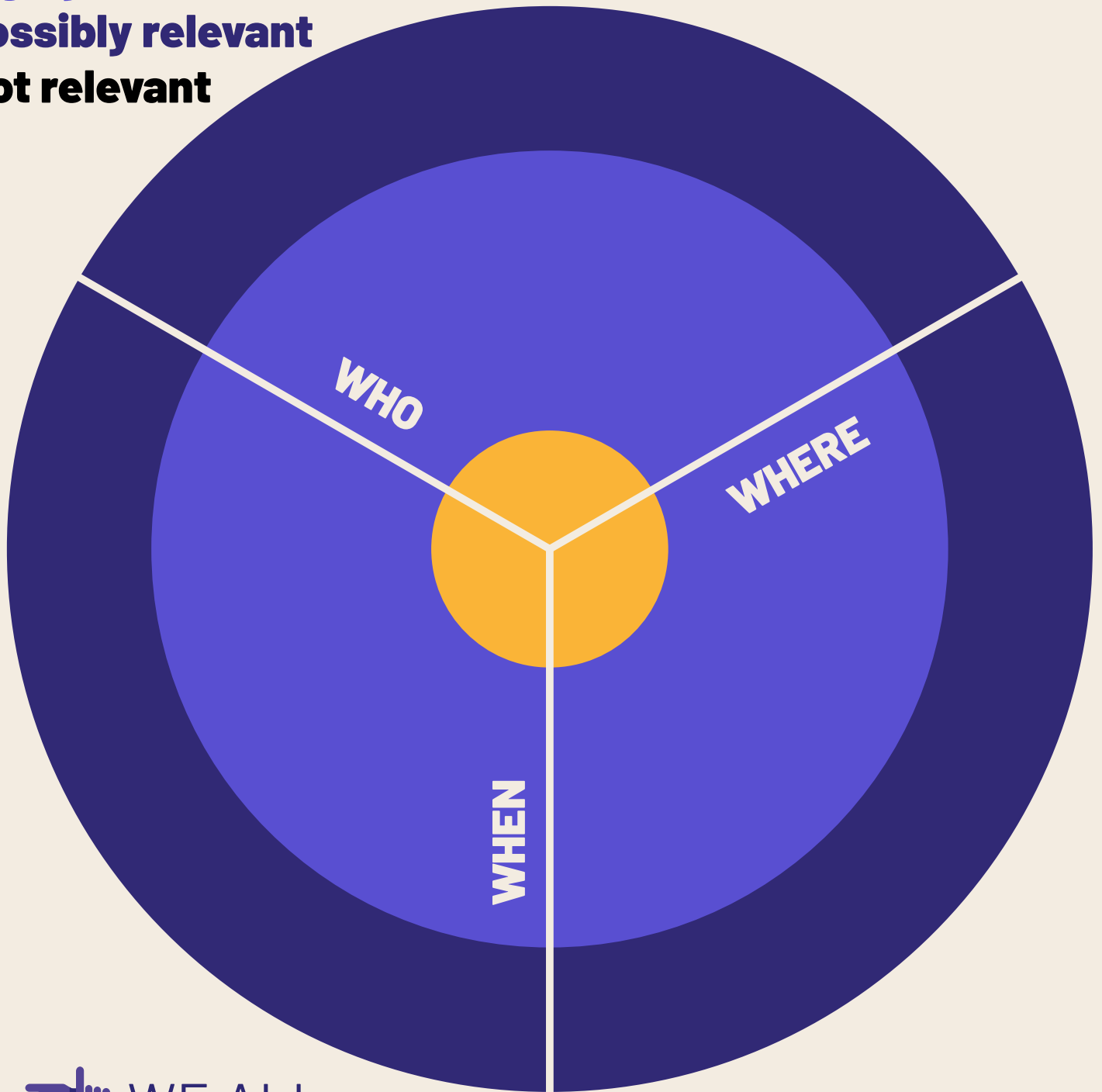
# Rings of Relevance

**Completely relevant**

**Highly relevant**

**Possibly relevant**

**Not relevant**



# Certainty Attachment



**How are we communicating certainty?**



**Who have we created certainty for?**



**To what do we attribute uncertainty?**

# **Does your interpretation match your process and intentions?**

## **1: Definition Match**

## **2: Relevance Match**

## **3: Technique Match**

## **4: Certainty Match**



# What possible **NARRATIVES** are you considering?

## **PERSPECTIVE**

**Good or bad?  
+ for whom?**

## **CONTEXT**

**How good or bad?  
+ by whose standards?**

## **CONSEQUENCE**

**So what?  
+ who should change?**

# How are you framing your **NARRATIVE**?

**Include an explicit description of PERSPECTIVE, CONTEXT and CONSEQUENCE. Are these in alignment with your equity priorities?**



# COMMUNICATION & DISTRIBUTION

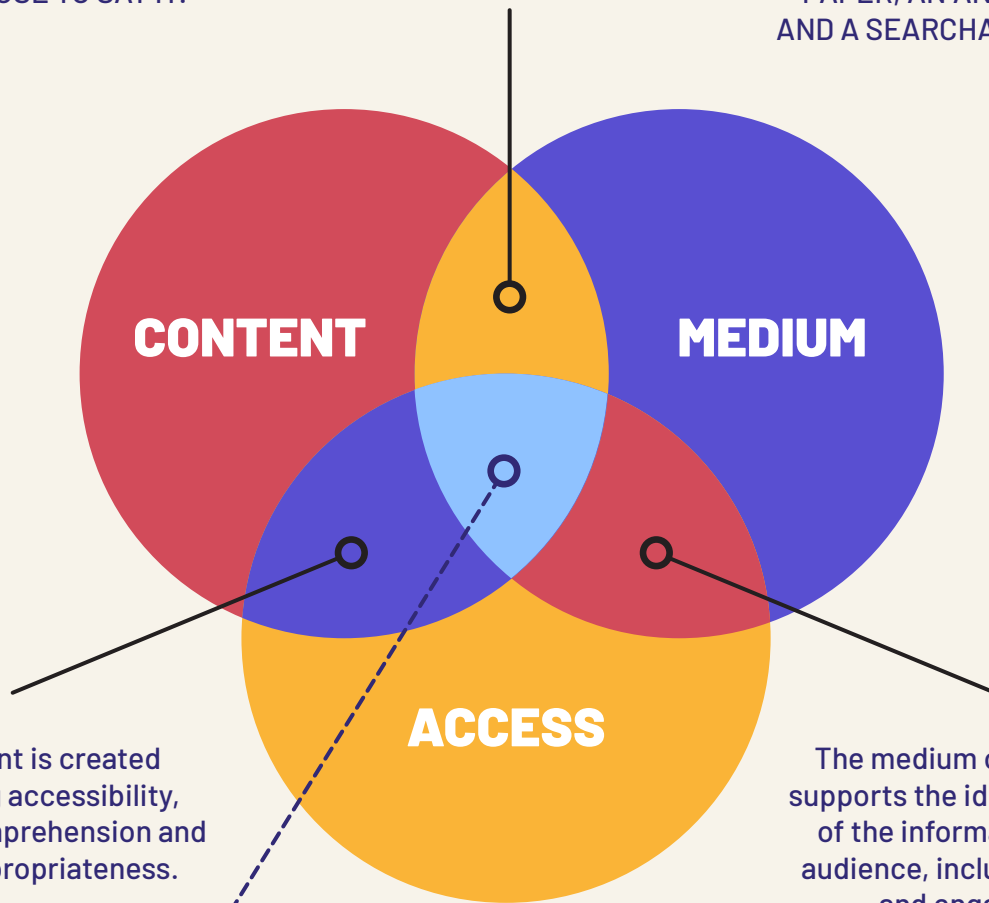
# EQUITABLE DISTRIBUTION

Each audience will have a **'sweet spot'** for how to best distribute your information.

CONTENT IS WHAT YOU INCLUDE IN YOUR COMMUNICATION AND HOW YOU CHOOSE TO SAY IT.

The content and medium work together to increase clarity and offer better depth.

MEDIUM IS WHAT FORM YOUR COMMUNICATION TAKES, LIKE THE DIFFERENCE BETWEEN A PAPER, AN ANIMATED VIDEO AND A SEARCHABLE DATABASE.



The content is created considering accessibility, including comprehension and cultural appropriateness.

The medium of distribution supports the ideal accessibility of the information for each audience, including feedback and engagement.

ACCESS IS HOW EASILY AND HOW COMPLETELY YOUR AUDIENCE CAN ENGAGE WITH AND UNDERSTAND YOUR INFORMATION.

WORKS FOR 'THIS' AUDIENCE

**Choose your audience and then optimize each element on the checklist to meet their needs.**

# CONTENT

- Subjects** - what should be included or excluded?
- Language** - what type of words are best understood?
- Length** - what is the ideal length?
- Depth** - how deep into the data and method?
- Tone** - What is the most equitable emotional undertone?
- Perspective** - Whose POV is the information presented in?
- Narrative** - What story type are you telling?
- Clarity** - Who can understand the information?
- Complexity** - Is it too complicated? Or too simple?
- Relevance** - Is there meaning for the audience?
- Cultural Translation** - Use of appropriate terminology, structure, stories and symbols for the audience.

**Choose your audience and then optimize each element on the checklist to meet their needs.**

# MEDIUM

- Digital vs. Print** - what is the audience's preference?
- Static vs. Dynamic** - video, animation, transitions?
- Interactive vs. Demonstrative** - dashboard vs. slideshow
- Branding** - are there secondary messages?
- Institutional Presence** - Who vouches for the information?
- Live vs. Standalone** - Will the information change?
- Isolated vs. Network** - Is the info in an ecosystem of other info? What is the context?
- Private vs. Public** - Will the information be experienced collectively or individually?
- Senses vs. Brain** - Does it engage the eyes? The ears? Does it effectively provoke thought?
- Appeal** - Is it beautiful? Pleasant to experience?

**Choose your audience and then optimize each element on the checklist to meet their needs.**

# ACCESS

- Digital vs. Print** - what tech do you need?
- Paywall** - do you need to pay to access?
- Ownership** - who 'owns' the information?
- Training** - do you need a specific education to understand it?
- Permanence** - Will it always be available?
- Depth** - Can you see the methodology?  
Raw data? Collection tools? Data Biography?
- Copyright** - What can you use the information for?
- Ableism** - Providing alternatives for differing ability?
- Feedback** - How can the audience respond to the content and the creators?

# Reverse Engineered Data Viz Legend Components

What do these elements mean to members of your intended audience?

**Colors**

**Shapes**

**Patterns**

**Size**

**Position**

**Axis**

**Images**

**Icons**

**Scale**

**(Motion/Change)**





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