



Evaluation + Strategy to Drive Racial Equity and Place-Based Systems Change

Strategic Plan
2024–2028

EQUAL
MEASURE

FINDING
PROMISE
FUELING
CHANGE

SUMMARY

Over the past 40 years, Equal Measure has made a name for itself in the areas of evaluation, collective impact, and place-based systems change. In this strategic planning process, we set out to sharpen our vision and mission and to expand our reach to a broader field of partners focused on racial equity and systems change.

Our vision is now that *we envision a society where race no longer predicts life outcomes*, which we will advance by *strengthening the knowledge and capacity of our partners to transform systems, eliminate racial disparities, and build equitable communities*.

This process was a re-envisioning of our work, building on our long history of supporting the philanthropic sector with evaluation and thought leadership. This year-long exploration of our work, our unique value, and our ecosystem led us to clarify our identity: *Equal Measure uses knowledge to inspire action*. With the powerful combination of evaluation with an explicit racial equity lens as our “superpower,” and an approach to advancing racial equity that emphasizes shared learning, we power systems change by deepening analyses, democratizing knowledge, and connecting networks through collective action.

We believe in our ability to provide “Knowledge to Inspire Action,” with the goal of connecting partners with our understanding of the complexity of systems and intersectionality of structural racism.

The following pillars of our theory of change move us closer to reaching that aim:

Knowledge Building: We bring community stakeholders to the table, facilitating the unearthing and discovery of how systems create inequitable outcomes.

Narrative Change: We expose harmful stories that hold inequities in place and offer data, context, and insights to help drive change toward a more equitable system.

Convening: Our core differentiation is being an objective convener, facilitator, and listener on racial equity issues; offering powerful insights, helping partners learn, and inspiring action.

Capacity Building: We leverage our evaluation superpower, combining insights with training, tools, practices, and technical assistance to equip partners to engage with communities and advocate for change.



VISION, MISSION, AND GUIDING PRINCIPLES

While the organization would continue its work toward systems change through equity-centered evaluation and collective action, the explicit focus on racial equity as the driving force going forward demanded revisiting the vision and mission statements.

After conversations with staff and Board, a new **vision** that links directly to racial equity was articulated—as was a new **mission** statement that explains how Equal Measure supports the field to advance racial equity. The **guiding principles** provide a critical point of view that anchors Equal Measure in a set of values and non-negotiables for how the organization shows up.

Vision

We envision a society where race no longer predicts life outcomes.

Mission

We strengthen the knowledge and capacity of our partners to transform systems, eliminate racial disparities, and build equitable communities.

Guiding Principles

We believe advancing racial equity requires partners and allies to be engaged in learning and unlearning; as individuals, as organizations, and in partnership with the communities they serve.

We believe the voices and experiences of those affected by structural racism must be amplified to shift power and centered in the design of more just systems.

We believe that getting to the root causes of structural racism and enabling those with influence and resources to change their behaviors are essential to addressing systemic inequities.

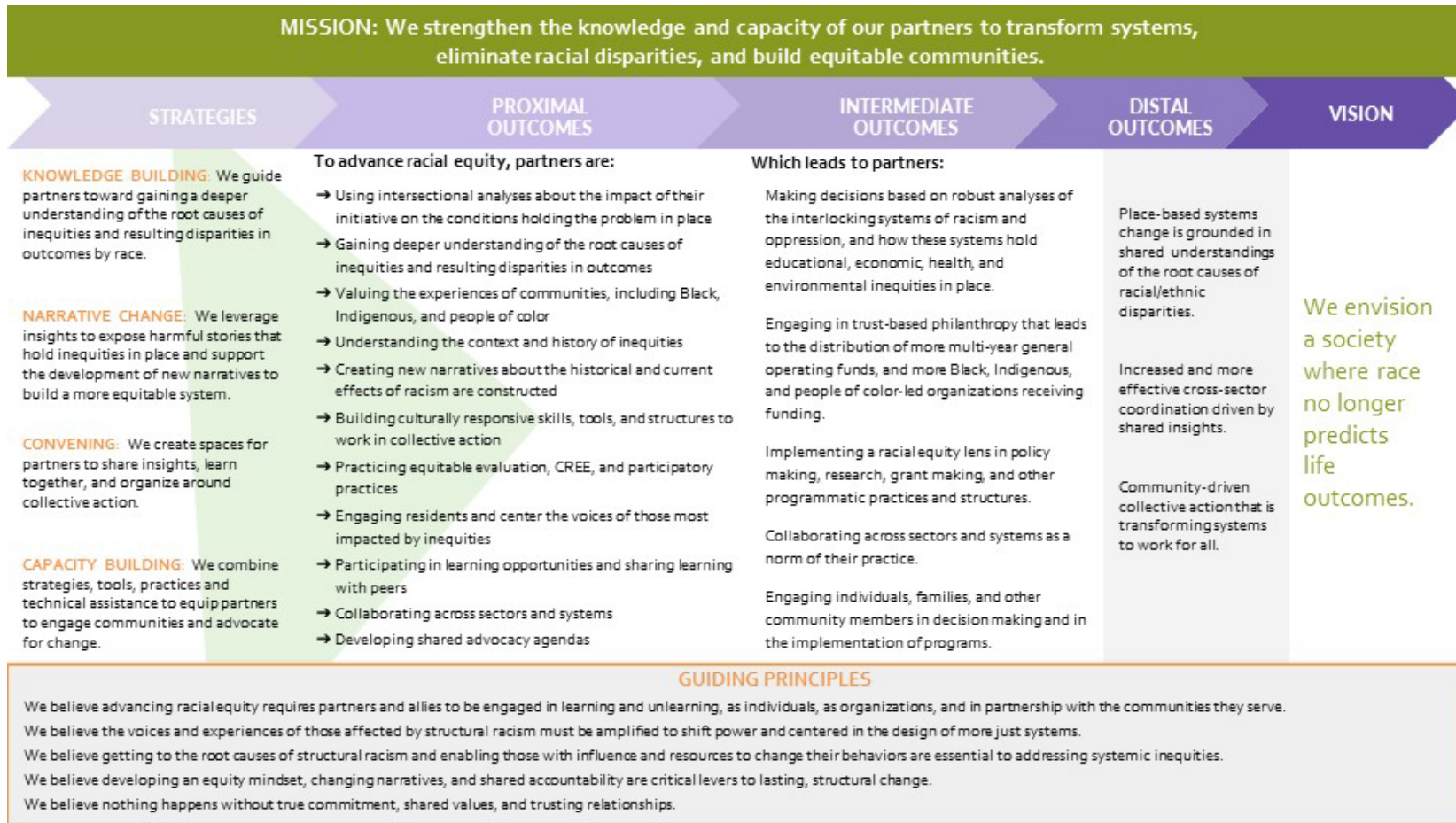
We believe developing an equity mindset, changing narratives, and shared accountability are critical levers to lasting, structural change.

We believe nothing happens without true commitment, shared values, and trusting relationships.



THEORY OF CHANGE

The vision, mission, and guiding principles provided a critical base from which the team crafted an organizational theory of change. This logical model articulates the near- and long-term outcomes necessary to advance our mission and achieve our vision and explains how our work drives toward these outcomes.



[See a larger version](#)



STRATEGIC FRAMEWORK

This framework details how we plan to approach the coming years to advance our mission. In this framework, we demonstrate how our new mission—to *strengthen the knowledge and capacity of our partners*—is supported by three goals.

Goal 1: Thought Leadership

Leverage thought leadership to drive Equal Measure’s mission and organizational growth

- Leverage our ability to derive insights from data to participate in conversations about social issues and support partners in policy and advocacy efforts (*Knowledge Building*)
- Build a communications plan that comprehensively amplifies our key messages, unique value proposition, thought leadership, and project work to the market (*Narrative Change*)
- Continue to expand the breadth and depth of partner and wider audience engagement using a variety of channels and platforms (*Convener*)

Goal 2: Business Development

Expand business development to build a diversified and sustaining portfolio

- Prioritize business development to grow work that advances the mission and theory of change (*Knowledge Building*)
- Grow our business development model (team, process, tools) (*Capacity Building*)
- Grow our portfolio through current business development processes (*Capacity Building*)
- Generate new leads to grow proactive business development (*Capacity Building*)



Goal 3: Learning and Capacity

Continue to grow as a learning organization in a fiscally responsible way

- Develop greater consistency and structure in our project delivery, e.g., equity-focused practices, approach to conducting landscape scans, project management, etc. *(Capacity Building)*
- Experiment with and evaluate team structures, processes, and other investments that could improve work quality and produce more efficient and profitable ways of working *(Capacity Building)*
- Develop a process for continuous talent assessment and investment in building our knowledge, skills, and abilities *(Capacity Building)*

The framework is designed with a series of objectives that support the new mission and each goal. Key performance indicators, or KPIs, will guide us in measuring our process and success. It is important to note that each objective and KPI ties back to one (or more) of the four strategies in the theory of change.

Our strategic goals and objectives are anticipated for a five-year horizon; however, with changing conditions and our experience and learning, we expect to revisit the strategies and extend the KPIs as appropriate, as this strategic plan exists as a living document.

