

Defining your role(s) allows you identify where gaps can be filled with collaborative efforts to advance health equity

Why Roles?

We believe these eight **key roles**¹ are necessary to holistically advance health equity on the ground in and across communities. Each organization or leader may **view themselves** as **one or multiple roles** within any collaboration depending on the community context, partners involved, type of impact sought, and more. The priorities of an organization or leader help determine **which of these roles are most important** to achieve the collective goal.



Community Organizing

Identify, engage, and mobilize key community actors and orgs. at the grassroots level.



Service Provision

Provide clinical and/or social service support based on community member needs.



Advocating

Advance reform of policy and laws through strategic use of health education, lobbying, and other tactics to drive momentum on social change.



Advising

Support capacity sharing² to promote co-learning and cross-learning.



Funding

Provide financing of community health work through grants, sub-contracting, philanthropy, and other self-funding mechanisms.



Learning

Support dissemination of knowledge, and collection and analysis of data and community stories to document and elevate progress across geographies.



Amplifying

Publicize and promote community voices and stories to broader communities to garner support.



Convening

Support backbone coordination and administrative functions to develop strategies and agendas unite actors.

Organization Reflection Questions: What role(s) do you currently play? What role(s) do you want to focus on for the future, based on your vision of health equity and recognition of limited time and resources?

Note: It is assumed that community members, in addition to organizations, play each of these roles and are sharing their lived experiences and voices to inform action throughout.

Sources: 1. [National Academy of Science, Engineering and Medicine](#) 2. [Michigan School of Public Health](#)

Community Organizing

Identify, engage, and mobilize key community actors and organizations at the grassroots level



Examples of entities that often play these roles:

CBOs, Faith Based Orgs.	CHWs, CHRs, Promotoras
AI/AN Community Leaders	Unions and Community Members

FOUNDATIONAL CHARACTERISTICS

Grassroots

Trusted

Courageous

KEY RESPONSIBILITIES IN ADVANCING HEALTH EQUITY

- Deeply understand community needs
- Function as 'Community Historian' – be able to unpack community's history and its relation to current disparities
- Acknowledge the previous voices and organizing initiatives within a community rather than starting from scratch
- Help marginalized community members realize and enact their power in a coordinated way to voice and prioritize their needs
- Identify key community actors and organizations to engage in coalition work to advance equity (know the landscape)
- Understand the positioning of key influencers to identify champions, neutral actors, and potential opponents
- Mobilize key actors in coalition to work towards goals
- Engage in advocacy work at the local level to drive systemic change
- Acknowledge potential community member frustration of being performatively 'elevated' without a clear action plan

TOOLS / TACTICS TO CONSIDER

- Partner with local contacts to identify who is *not* currently engaged that needs to be
- Create forums for open discussion
- Identify potential partners using [ecosystem mapping](#)
- Understand authority and influence of partners through [power mapping](#)
- Use [accountability mechanisms](#) to support actioning on identified issues together
- [Create conditions for people to elevate their own lived experience](#) to influence policy makers
- Align on language to voice community and organizational needs to funders

WAYS TO INFORM SHARED MONITORING AND EVALUATION



Advocate to funders for the selection of appropriate metrics informed by community context



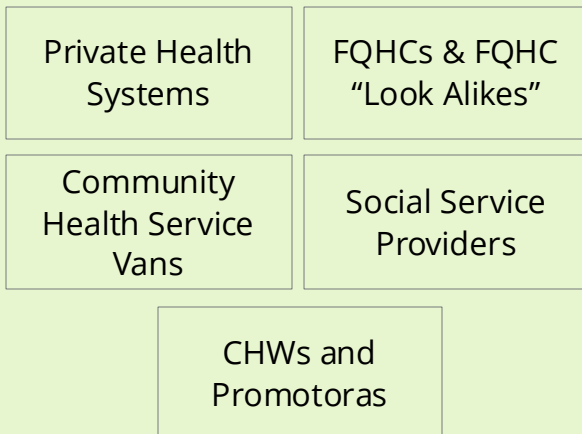
Feel empowered to engage in all stages of the evaluation process from data collection to analysis and dissemination

Service Provision

Provide clinical and/or social service support based on community member needs



Examples of entities that often play these roles :



FOUNDATIONAL CHARACTERISTICS

Knowledgeable

Supportive

Empathetic

KEY RESPONSIBILITIES IN ADVANCING HEALTH EQUITY

- Improve access to care for all, and especially for marginalized populations
- Deliver services that are tailored to community needs
- Connect community members with resources necessary for holistic support and wellbeing
- Work to influence the drivers of health (SDOH) factors that influence patient outcomes (e.g., clinical-social integration outside of 'traditional' care delivery systems)
- Listen to and elevate voices of community members and organizers to understand community needs
- Use specialties to highlight shortcomings of system and identify potential solutions
- Partner with organizations to integrate social services in healthcare

TOOLS / TACTICS TO CONSIDER

- Provide adequate and consistent funding (e.g., *lack of financial sustainability can break trust with CHWs / Promotoras*)
- Provide care and benefits to avoid and address burnout
- Hire staff that reflect the diversity of the community
- Provide training to promote equity and justice
- Learn from and engage CHWs / Promotoras / CHRs to [prioritize cultural humility](#) in care delivery

WAYS TO INFORM SHARED MONITORING AND EVALUATION



Advocate for analysis of root causes of health outcomes to identify systemic challenges to equity (e.g., *housing policy metric and not only disease state prevalence metric*)



Gather feedback from community organizers on measures that are most appropriate for the community context and adapt M&E practices accordingly



Promote transparency by sharing appropriate trends and health outcomes analysis with coalitions

Advocating

Advance reform of policy and laws through strategic use of health education, lobbying, and other tactics to drive momentum on social change



Examples of entities that often play these roles:

Local or National Organizers	Non-Profits
Associations & Constituencies	Policymakers

FOUNDATIONAL CHARACTERISTICS

Strategic

Influential

Forward-looking

KEY RESPONSIBILITIES IN ADVANCING HEALTH EQUITY

- Use platform and expertise to influence policy changes that meaningfully advance health equity and social justice - customized methods of advocacy depending on audience
- Engage people with lived experience in the design and adaptation of policies and programming
- Compensate community members engaging in policy design in an equitable manner
- Recognize and examine disparities in power amongst groups engaged in advocacy
- Avoid exploiting or tokenizing lived experience
- Define and cultivate avenues to bring community members to the table (i.e., in congressional briefings)
- Educate individuals (when needed / appropriate) on policy innerworkings (i.e., timing, cycles and implementation)
- Consider positive and negative implications of policy change

TOOLS / TACTICS TO CONSIDER

- Build partnerships to understand local community needs and policies affects
- [Map power](#) to identify where power sharing needs to occur
- Engage people with lived experience to [improve Federal and local research, policy and practice](#)
- Ensure [thoughtful, intentional and inclusive advocacy](#)
- Allocate resources for compensation of time
- Create touchpoints for [accountability check-ins](#)

WAYS TO INFORM SHARED MONITORING AND EVALUATION



Create policies through evidence-based decision making that includes both qualitative and quantitative data to reflect lived experience



Advocate for the inclusion of workforce related metrics in making policies (e.g., *CHW satisfaction along with patient outcome data*)

Advising

Support capacity sharing across organizations to promote cross-learning



Examples of entities that often play these roles:

Non-Profits	Health Departments
Philanthropies	Consultants

FOUNDATIONAL CHARACTERISTICS

Experienced

Responsive

Adaptable

KEY RESPONSIBILITIES IN ADVANCING HEALTH EQUITY

- Provide physical resources and operating support (e.g., training, laptops, meeting materials, etc.)
- Elevate and share knowledge and expertise that sits within communities
- Support training that enhances community capabilities (e.g., grant writing researching, advocacy etc.) and acknowledges underlying history and current pressing issues
- Use effective learning strategies to deliver content that resonates with the community, e.g. through arts and culture
- Maintain open, transparent communication with partners and provide ongoing training and supervision support
- Mobilize advocacy through sharing of lived experience to support systemic change
- Help to identify sources of inequities or progress blockers

TOOLS / TACTICS TO CONSIDER

- Partner with other organizations to access resources and space
- Promote humility in learning; ask community leaders for insights
- Host [feedback mechanisms](#) to adapt content as needed
- Consider adopting [Guiding Principles for Effective Technical Assistance](#)
- Connect regularly with partners for co-learning
- Compensate community members and community-led initiatives to support economic development

WAYS TO INFORM SHARED MONITORING AND EVALUATION



Share leading practices and guidelines across organizations on how to develop measures based on an organization's needs



Advocate for reducing the workload to fulfill M&E requirements by funders / government programs



Capture measures that indicate if training or programming is achieving community goals (e.g., moving beyond # of trainings provided to equity factors)

Funding

Provide financing through grants, sub-contracting, philanthropy, self-funding, and other mechanisms



Examples of organizations that often play these roles:

Private or Corporate Philanthropies	Private Sector <i>(e.g., health systems, private insurers)</i>
Government Agencies <i>(e.g., CMS, HRSA)</i>	Non-Governmental Organizations

FOUNDATIONAL CHARACTERISTICS

Well-Connected

Well-Resourced

Versatile Interests

KEY RESPONSIBILITIES IN ADVANCING HEALTH EQUITY

- Broaden funding eligibility to address historical and current inequities in funding allocation
- Identify possible funding recipients to maximize impact at local level, weighing collaboration as a grant decision factor
- Elevate organizations with expertise and lived experience, acknowledging power asymmetries
- Maintain transparency in funding decisions and communicate funding organizations' timeline commitments
- Foster diversity and inclusion within funding organization
- Leverage influence and reach to advocate for and to fund systemic change work (including collaboration efforts)
- Support community to set priorities

TOOLS / TACTICS TO CONSIDER

- Reduce [restrictiveness of funding and reporting](#), while maintaining impact-driven reporting guidelines
- Create flexible and multi-year funding mechanisms
- Utilize [power mapping](#) to recognize bias
- Build situational awareness through deep listening and create forums for feedback
- Partner with regional orgs. to understand [local ecosystems](#)
- Recruit and promote staff that reflect communities funded

WAYS TO INFORM SHARED MONITORING AND EVALUATION



Increase flexibility of funding and M&E requirements by supporting orgs. to assert what they believe to be meaningful to share



Co-design sustainable and relevant M&E measures with representatives from the community



Support general, operating, and administration costs to support infrastructure needed for M&E

Learning

Support dissemination of knowledge, and collection and analysis of data and community stories to document and elevate progress across geographies.



Examples of entities that often do these functions:

Academic Institutions	Non-Profits
Government Agencies, Health Departments	Research Focused CBOs

FOUNDATIONAL CHARACTERISTICS

Analytical

Open-minded

Methodological

KEY RESPONSIBILITIES IN ADVANCING HEALTH EQUITY

- Promote community-led engagement throughout research process including identification of priority areas, collection, and interpretation of data
- Support inclusivity in researchers and methods used by training and elevate community researchers
- Promote transparency in community-collected data to build trust; acknowledge power held by 'traditional' research institutions and elevate community expertise in the research process
- Use research to identify root causes of inequities and effective solutions in addition to measuring health outcomes
- Share resources and results of research across geographies to empower communities; promote co-learning

TOOLS / TACTICS TO CONSIDER

- [Adopt Community Based Participatory Research \(CBPR\) principles](#)
- [Consider Community Health Assessment\(s\)](#) (*while understanding critiques*)
- Elevate lived experience in research
- Collaborate with community members to identify systemic causes of inequities
- Give credit or co-authorship to all orgs. and leaders involved

WAYS TO INFORM SHARED MONITORING AND EVALUATION



Partner with community representatives to identify relevant measures together



Gather and analyze data and maintain publicly-available databases



Elevate use of data and metrics in funding applications and reporting



Advocate for the measurement of workforce experience in addition to social and health economics

Amplifying

Publicize and promote community voices and stories to broader communities to garner support



Examples of entities that often play these roles:

Media	Academic Institutions
Health Departments	Community Leaders <i>(e.g., Religious, Barber Shops, Soccer Coaches)</i>
Community Orgs. / Centers	

FOUNDATIONAL CHARACTERISTICS

Influential

Persuasive

Magnifying

KEY RESPONSIBILITIES IN ADVANCING HEALTH EQUITY

- Use media to publicize local success stories, ongoing events, or challenges to elevate the work of coalitions and increase awareness of community health and social justice
- Craft narratives and communications strategically to be crisp, accessible, actionable, and available to the public while remaining authentic to community voices
- Promote transparency and accountability in communication within partnerships to build trust
- Create safe spaces for communities to share in the ways they prefer (without relying on traditional institutional powers); empower communities to amplify their own stories
- Recognize the power of individual leaders who determine which health equity stories are elevated and abide by the duty to do no harm

TOOLS / TACTICS TO CONSIDER

- Give credit to community voices when elevating their stories
- Consider WHO's ["Infodemic" Management Tools](#) for tips on social listening and info. sharing
- Be intentional about creating [culturally accessible narratives](#)
- Identify strategic opportunities to amplify messaging (e.g., [Berkeley Media Studies Group Guide](#))
- Find shared language for short-term change while shifting to community vocabularies over time

WAYS TO INFORM SHARED MONITORING AND EVALUATION



Support dissemination of findings to amplify reach of success stories, current issues, and work in progress to general public in accessible language



Consistently evaluate which data sources are used and whose stories are shared through qualitative and quantitative evaluation

Convening

Support backbone coordination and administrative functions to develop strategies and agendas to unite actors



Examples of entities that often play these roles:

Professional Associations	Non-Profits
Groups of CBOs	Local, State, Federal Government

Local Gathering Hubs
(e.g., churches, bodegas, bars, cafes)

FOUNDATIONAL CHARACTERISTICS

Inclusive

Trustworthy

Accommodating

KEY RESPONSIBILITIES IN ADVANCING HEALTH EQUITY

- Bring community members, community leaders, and diverse community organizations together
- Recruit actors from marginalized communities to ensure group is representative of the entire community
- Facilitate discussions to promote alignment or discuss tensions across local and national groups
- Navigate power dynamics among groups to support the creation of a community-driven agenda
- Invest in long-term trust-building among partners to support coalition building
- Create alignment on vision and goals for coalition amongst multiple perspectives

TOOLS / TACTICS TO CONSIDER

- Bring community members in first, and then identify potential partners using [ecosystem mapping](#)
- Connect on shared values through [forums for ongoing discussion and feedback](#)
- Promote [accountability](#) among coalitions and provide funding for coalitions
- Align on a collective future aspiration and set group goals
- Utilize [power mapping](#) to craft governing structures that cede power

WAYS TO INFORM SHARED MONITORING AND EVALUATION



Create forums for coalition members to align on shared metrics and share back to the community



Elevate community voices and power to ensure metrics are community driven



Measure progress of convening itself and promote accountability through M&E