The Center for
High Impact Philanthropy
School of Social Policy & Practice
UNIVERSITY *of* PENNSYLVANIA

Choosing Change

How to Assess Grant Proposals for Their Potential to Address Structural Inequality

Contents

Executive Summary

The COVID-19 global pandemic exacerbated longstanding disparities by race, gender, and socioeconomic status. Individuals, communities, and countries that were already vulnerable were even more at risk. In response, many individual donors and institutional grantmakers have sought to address the structural inequalities that prevent people from surviving, let alone thriving.

Structural inequality exists across a wide range of social issues, including health care, education, economic development, environmental impact, and many more. Even when a proposal has not been designed specifically to address structural inequality, considering factors that contribute to structural inequality can help funders recognize those proposals with the potential for lasting impact.

Against this backdrop, our team at the Center for High Impact Philanthropy partnered with Lever for Change, an affiliate of the John D. and Catherine T. MacArthur Foundation. Lever for Change facilitates the review and selection of thousands of philanthropic proposals through its 100&Change Competition and other smaller competitions focused on surfacing promising ways to address issues like income inequality and gender equity. The goal of our partnership was to develop a tool that

everyone in the field could use to assess proposals for their potential to address structural inequality. The Lever for Change team served as thought partners and granted our team access to the data behind 20 real-world proposals against which we tested early versions of the tool.

Faculty colleagues at the University of Pennsylvania's School of Social Policy & Practice were critical in helping us understand existing frameworks for analyzing structural inequality and the relative strengths and limitations of these frameworks.

Many other colleagues, representing philanthropic funders, nonprofits, and the clients they serve, helped refine our initial ideas. **They helped ensure that the tool was both actionable and informed by the best available evidence.**

The resulting tool kit — the rubric, guidebook, scoresheet, and accompanying website — is the result of a collaborative effort between our team and the many people dedicated to doing good by dismantling structural inequalities. Given the unprecedented health and economic harm caused by the global pandemic, their commitment reminded us of the promise of philanthropy when its purpose is to create greater social impact.

Conor P. Carroll, MPA
Social Impact Fellow

Hanh La, MHS, PhD
Director, Applied
Research & Analysis

Melissa Ortiz, MSEd
Applied Research Analyst

Katherina M. Rosqueta, MBA
Founding Executive Director

Emily Seeburger, MPH
Applied Research Analyst

Definition of Structural Inequality

Structural inequality describes disparities in wealth, resources, and other outcomes that result from discriminatory practices of institutions such as legal, educational, business, government, and health care systems.

Structural inequalities result from power imbalances when one group has historically set the rules that intentionally or unintentionally exclude others from access to wealth and resources.[1] Those in positions of economic and political power reap benefits and perpetuate systems that deny those benefits to others. In social science literature, the classic example is a feudal lord who hangs a chain across a river and demands payment from any boat that wants to pass.[2] A more contemporary example in the United States is redlining, the practice of not providing mortgages for homes located in minority neighborhoods. Although outlawed by the 1968 Fair Housing Act, the practice paved the way for racial segregation of cities and prevented Black communities from building generational wealth.[3] Around the world, similar barriers persist for women's economic independence. In nearly 40% of the world economies, women cannot own property,[4] leaving them more vulnerable than men to extreme poverty.

When we reviewed existing frameworks for understanding inequality across several domains, we found that the following dimensions appeared most often when identifying disparities: economic opportunity, education, family/household characteristics, geography, and health care.

Structural inequality differs from inequality in outcomes that can result from a person's individual efforts. Instead, structural inequality focuses on the practices that shape outcomes for individuals, **independent** of their personal decisions, efforts, talent, or needs.[5] Segregation and the disenfranchisement of Black Americans that continued after slavery was formally abolished is one of the starkest examples of structural inequality in the U.S.

What's in This Guide

To help you assess proposals for their potential to address structural inequality, we provide the following resources in this guide:

Our working definition of structural inequality. This definition considers the many definitions and concepts we reviewed during the course of the project and distinguishes "structural inequality" from the kind of inequality that results from an individual's personal decisions or choices. **05**

Tool for assessing proposals. Together, these tools can be used to assess proposals for their potential to address structural inequality. The scoring sheet is also available in a Microsoft Excel spreadsheet format for free download from our website. **06**

Context for using the tool. Issues of structural inequality exist within philanthropy. Understanding them can help you apply the tool even more effectively. **07**

Detailed definitions and guidance for applying this rubric. To help you understand the different elements of the rubric, we provide detailed definitions of each element, along with instructions on how to consider each element when reviewing a proposal. **08**

Methodology, endnotes, and acknowledgements provide more information for those interested in how we arrived at our tool and the evidence behind it. **16**

The material in this guide is further supplemented by additional information on our website at **www.impact.upenn.edu/toolkit/ choosingchange**.

Tool for Assessing Proposals
Choosing Change Rubric Elements & Questions to Ask

Inclusivity: Involvement of intended beneficiaries

How much do beneficiaries shape the proposed solution design, implementation, and and monitoring and evaluation? How deeply and frequently does the organization engage intended beneficiaries? How well does the organizational model incorporate intended beneficiaries' input throughout its solution?

Durability of Power: Assurance that gains of power will persist

How well does the proposal actively shift the balance of power toward groups disadvantaged by structural inequality and create a sustainable source of power for those groups?

How well does the proposal develop and engage with leaders in the intended beneficiary community , also known as proximal leadership.

How well does the proposal build the capacity (e.g., financial resources, knowledge, skills, networks) of the intended beneficiary population so that the solution is sustained?

Strength of Evidence: The case for potential success

How compelling is the evidence for a solution that addresses a barrier to structural equality?

How strong is the evidence that the problem the proposal is solving contributes to structural inequality?

How strong is the evidence that the chosen solution has the potential to reduce structural inequality?

Organizational Capacity: Ability to implement, measure, and manage results

How much does the proposal demonstrate an ability to create impact, given the organization's history and resources?

How much does the organization's prior work show a commitment to addressing structural inequality?

How adequate are the organization's resources (staff, budget, capabilities, governance, board leadership) for implementing, measuring, and managing toward intended results?

Systems-Level Impact: Approach to addressing systems-level barriers

If successful, will this proposal address systems-level barriers and provide opportunities for structural change in the field of social impact it operates within?

How well does the proposal's solution leverage and influence the work of existing stakeholders — other nonprofits, policymakers, commercial interests — to address the problem it seeks to solve?

How strong is the proposal's plan for scaling its solution?

Context for Using the Tool: Who Decides

Structural inequality exists not only in the areas where professional grantmakers and individual donors seek impact (e.g., health care, education, economic development, environmental impact), but also in philanthropy itself.

Philanthropy is the use of private wealth for public good. In the United States, which has the largest organized philanthropic sector, there is a well-documented and perpetually stable wealth disparity along racial and gender lines, and the philanthropic sector is predominantly white-led and -staffed.[6]

This context has three important implications for those using this tool:

First, there is the opportunity to be inclusive in who uses this tool and who ultimately decides which proposals receive funding. When the people who evaluate proposals and decide which ones receive funding reflect and are drawn from the beneficiary community, the grantmaking process itself can help address structural inequality.

Second, smaller and/or minority-led organizations may have received limited past support, not because of limitations in their proposals, but because of a structural lack of access to wealth, networks, and philanthropic resources.

Third, each person who reviews a proposal comes to the table with not only their area of knowledge and expertise, but also their perspectives and biases. The background and profiles of reviewers must be considered and communicated honestly and transparently.

For more about philanthropy's talent pitfalls and how to incorporate more diverse perspectives into your philanthropic activities, see CHIP's **Talent for Giving**.

Description of the Rubric Elements and How to Use Them

The rubric for assessing proposals contains five elements. The first two elements — Inclusivity and Durability of Power — are central to structural inequality. This is because exclusion of people from positions of power defines structural inequality (see page 4). Considering and assessing these two elements will help you understand whether the proposal is positioned to tackle structural inequality.

To succeed a potential grantee must have the capabilities to implement a solution successfully. The next three elements — strength of evidence, organizational capacity, and systems-level impact — address the proposal's likelihood of succeeding.

On the next pages you will find a description of each element, why each matters for assessing a proposal for its potential to address structural inequality, and guidance on how to consider the element as you assess proposals.

Inclusivity

Involvement of intended beneficiaries

Structural inequality both results from and leads to the exclusion of the interests and perspectives of certain groups. Inclusivity does just the opposite. Inclusivity refers to how much beneficiaries — the people and communities may benefit who are intended either directly or indirectly from the proposed solution — are involved. Two dimensions of inclusivity are depth and frequency. Depth refers to how much the interests and perspectives of the intended beneficiaries are systematically incorporated and reflected in the proposal — from priority setting, planning, solution design, implementation, monitoring and evaluation, to ongoing learning. Frequency refers to how often the organization proposing the solution interacts with members of the beneficiary community.

Inclusivity ensures rich and frequent beneficiary involvement in planning, leadership, program design, implementation, and evaluation. Such involvement helps to ensure the proposed solution is considered important and desirable by the affected community, reflects the relevant cultural norms needed for acceptance of the solution, and mitigates the risk of unintentional harm. Ongoing involvement builds trust and promotes knowledge sharing, both of which are important in creating greater equity and sustaining positive change. The most inclusive organizations are led and operated by members of the beneficiary community itself.

QUESTIONS
How much do beneficiaries shape the proposed solution design, implementation, and and monitoring and evaluation?
How deeply and frequently does the organization engage intended beneficiaries?
How well does the organizational model incorporate intended beneficiaries' input throughout its solution?

| 0	1	2	3	4
The proposal's solution has been determined by those not from or representative of the intended beneficiary population/community.	The proposal incorporates the perspective of intended beneficiaries into either its program design, implementation, or evaluation, or some combination of the three. Beneficiary involvement is one-off or infrequent.	The proposal incorporates the perspectives of intended beneficiaries into several dimensions of the proposal (program design, implementation, or evaluation). Beneficiary involvement is moderate.	The proposal incorporates the perspectives of intended beneficiaries into all dimensions of the proposal (program design, implementation, or evaluation). Beneficiary involvement is frequent.	The proposal was designed by members of the intended beneficiary community who oversee and are involvement in all dimensions of the proposal (program design, implementation, or evaluation). Beneficiary involvement is continuous and ongoing at all levels.

HOW TO SCORE THIS ELEMENT

The highest-scoring proposals (4) will introduce a solution that was designed and led by members of the beneficiary community. The next highest scoring (3) will be characterized by frequent or continuous, ongoing beneficiary involvement throughout, including leadership and staff from the beneficiary community. A mid-range proposal (2) incorporates intermittent engagement in most or all phases. A low scoring proposal (0-1) incorporates infrequent, one-off, or nonexistent beneficiary engagement during only one part of the proposed effort.
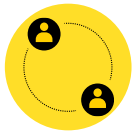
Durability of Power

Assurance that gains of power will persist

Durability of Power refers to how well the solution ensures that any gains in power persist. Proposed solutions create durable power by enhancing the capacity of existing leaders and cultivating new ones from the intended beneficiary community. The overarching goal is that the need for the proposed solution will eventually become obsolete because those who historically have lacked access to power now have it.

Structural inequality means that certain groups lack the power to influence how organizations, businesses, government, and social networks affect their lives. Enhancing the power of disadvantaged groups helps break down structural inequality.

Those who are already viewed as leaders in the beneficiary community are often referred to as "proximal" leaders.[7] Their proximity means they recognize assets and risks that are often overlooked or misunderstood by outsiders. Such proximal leaders are instrumental in addressing structural inequality because they bring experience, relationships, data, and knowledge that are essential for solutions that have a lasting impact.

QUESTIONS

How well does the proposal actively shift the balance of power toward groups disadvantaged by structural inequality and create a sustainable source of power for those groups?

How well does the proposal develop and engage with leaders in the intended beneficiary community (Often referred to as "proximal" leadership)?

How well does the proposal build the capacity (e.g., financial resources, knowledge, skills, networks) of the intended beneficiary population so the solution is sustained?

0	1	2	3	4
The proposal has no plan for creating a durable source of power by engaging and building proximal leaders. There is no way for beneficiaries to assume control of the solution to drive sustainability.	The proposal has an unclear plan for creating a durable source of power by engaging and building proximal leaders. There is no clear plan for beneficiaries to assume control of the solution to drive sustainability.	The proposal has a cursory plan for creating a durable source of power by engaging and building proximal leaders. There is a plan for beneficiaries to assume control of the solution to drive sustainability, but feasibility is not certain.	The proposal has a workable plan for creating a durable source of power by engaging and building proximal leaders. There is a feasible way for beneficiaries to assume control of the solution to drive sustainability.	The proposal has a sustainable plan for creating a durable source of power. Its team is led by proximal leaders participating in every step of proposal design and execution. Beneficiaries control the solution to drive sustainability.

HOW TO SCORE THIS ELEMENT

Under Durability of Power, the highest-scoring proposals (3-4) either have active proximal leadership, or a concrete plan for engaging and developing proximal leadership. A mid-range proposal (2) also communicates a plan for engaging and developing proximal leadership but is less clear on how beneficiaries will eventually exercise power. The lowest-scoring proposals (0-1) either do not incorporate proximal leadership at all, or it is incorporated so minimally that there is no feasible plan for beneficiaries to have increased power or agency for the long term.

While unpaid advisory groups and mentoring programs can contribute beneficiary insights and build proximal leaders, proposals with the greatest chance of reducing structural inequality have proximal leaders at all levels of decision-making, fully participating in the design, planning and implementation of solutions.

Strength of Evidence

The case for potential success

Strength of evidence refers to the case the proposal makes for the potential success of its proposed solution to reduce structural inequality.

The Center for High Impact Philanthropy's broad definition of evidence includes three sources of evidence for a more inclusive view that goes beyond traditional scientific, empirical evidence to include observations of stakeholders and the perspectives of those most directly affected. All of these sources of evidence inform a strong theory of change.[6]

- The first is scientific research and evaluation results from sources such as randomized control trials, program evaluations, and rigorous comparison studies.
- The second source of evidence comes from the field and includes the perspectives, experiences, and practical insights of those working on the frontlines and the beneficiaries themselves.
- The third source of evidence is informed opinion, which includes the views of other stakeholders such as policymakers, journalists, donors, and those working in peer organizations.

All three sources of evidence are valid, and each brings relative strengths and limitations (for more see **Rethinking the E Word**). The strongest case for success exists when all three sources of evidence point in the same direction. However, a strong, plausible, compelling case may be made for a solution even with limited evidence from the first category. There can be big differences in both the amount and type of relevant evidence, depending on the cause area the proposal addresses; the developmental stage of the organization; and whether the proposal is for research, direct service, or advocacy.

For example, a strong proposal for a needed but still untested program will have clear understanding of the root causes of the problem and evidence that the solution is promising, but it may not yet have empirical proof. In these cases, Strength of Evidence also refers to how strong the case is for the potential for the proposal to achieve its intended impact. A proposal for expanding a longstanding direct-service program that has already scaled to many states or countries would be expected to have available client-level evaluation results, whereas a new policy initiative for more equitable funding would not yet have any individual-level results. Instead that proposal would rely on data regarding existing disparities and a modeled analysis of how the new policy might close them.

How compelling is the evidence for a solution that addresses a barrier to structural equality?
How strong is the evidence that the problem they are solving contributes to structural inequality?
How strong is the evidence that their chosen solution has the potential to reduce structural inequality?

0	1	2	3	4
The proposal offers implausible evidence that the proposed solution will be effective. The solution targets a problem with an indirect/trivial relationship to structural inequality.	The proposal offers minimal, marginally plausible evidence from few sources that the solution has the potential to be effective. The solution targets an aspect of structural inequality.	The proposal offers some plausible evidence from few sources that demonstrates the solution has the potential to be effective. The solution targets an aspect of structural inequality.	The proposal offers evidence from a handful of sources that demonstrates the solution has the potential to be effective. The solution targets an aspect of structural inequality.	The proposal offers significant evidence from many sources that demonstrates the solution has the potential to be effective. The solution targets an aspect of structural inequality.

HOW TO SCORE THIS ELEMENT

When scoring for this element, consider whether the type and amount of evidence matches the specific proposal. The highest-scoring proposals (3-4) provide substantial, credible, compelling evidence that the proposed solution is thoughtful in its design; will be effective in its implementation; and is directly related to some aspect of structural inequality. A mid-scoring proposal (2) suggests a solution that is also directly related to an aspect of structural inequality, but the evidence presented may be only tangentially related and only meet the threshold of plausible. A low-scoring proposal (0-1) fails to address an aspect of structural inequality or addresses an aspect but presents minimal or weak evidence, rendering the success implausible.

Organizational Capacity

Ability to implement, measure, and manage results

Organizational Capacity refers to the proposing organization's or group's ability to implement, measure, and manage its intended results, given the talent, capabilities, and financial resources at its disposal. Organizational Capacity also includes a demonstrated past commitment to addressing structural inequality. In assessing this element, you are assessing whether the proposal's intended results are "right-sized" to the team and resources available. This is a feasibility check.

For example, a national nonprofit with affiliate partners in multiple cities and a track record of success in direct service and advocacy could be in an excellent position to shift policy in its home country and maybe even influence policy in others. On the other hand, a young, grass-roots organization in a country that lacks infrastructure may be expected to deliver services to a disadvantaged community that had previously lacked access to services. However, it would be unfair to hold that organization accountable for shifting national or regional policy.

If a proposal ranks high on all other elements of the rubric, resist eliminating it from funding decisions purely on the basis of limited existing organizational capacity. As mentioned on page 5, there is a well-documented historic underinvestment in organizations led by certain leaders. Philanthropic funding can help rectify this lack of investment and bring capacity to nonprofits with high potential that have previously been excluded.

QUESTIONS

How well does the proposal demonstrate an ability to create impact, given the organization's history and resources?

How much does the organization's prior work show a commitment to addressing structural inequality?

How adequate are the organization's resources (staff, budget, capabilities, governance, board leadership) for implementing, measuring, and managing toward sintended results?

0	1	2	3	4
The organization does not demonstrate a commitment to addressing structural inequality, and it does not have the resources to effectively implement, measure and manage toward its intended results.	The organization demonstrates a minimal commitment to addressing structural inequality but does not have the resources to effectively implement, measure, and manage its solution toward its intended results.	The organization demonstrates a prior commitment to addressing structural inequality but its resources may not be sufficient to effectively implement, measure, and manage toward its intended results.	The organization demonstrates an existing prior commitment to addressing structural inequality and its resources are right-sized to effectively implement, measure, and manage toward its intended results.	The organization demonstrates a deep prior commitment to addressing structural inequality and its resources are more than sufficient to implement, measure, and manage toward its intended results.

HOW TO SCORE THIS ELEMENT

The highest-scoring proposals (3-4) historically view their work as contributing to reducing structural inequality *and* have the appropriate level of staff and other organizational resources to successfully implement their solutions. A mid-range proposal (2) comes from an organization that may have addressed an element of structural inequality in the past, but whose resources may be slightly undermatched to the proposed solution. Low-scoring proposals (0-1) have no or minimal history of addressing structural inequality and whose limited resources make it implausible that its solution would succeed.

Systems-Level Impact

Approach to addressing systems-level barriers

Systems-level impact refers to how well the proposal's solution addresses systems-level barriers to advance structural change.

A system is composed of multiple institutions. For example, the system for ensuring public health includes health agencies at every level of government, labs and hospitals, educational institutions, and private organizations. Meaningful shifts in a system require institutions to change their practices. For that reason, this category assesses the extent to which the proposed solution works with, leverages, and has the potential to shift the work of multiple stakeholders — other nonprofits, policymakers, and commercial interests.

QUESTIONS

If successful, will this proposal address systems-level barriers and provide opportunities for structural change in its field?

How well does the proposal's solution leverage and influence the work of existing stakeholders — other nonprofits, policymakers, commercial interests — to address the problem it seeks to solve?

How strong is the proposal's plan for scaling its solution?

0	1	2	3	4
The proposal has negligible impact on existing policies, institutions, or power structures, and shows little understanding of how to leverage existing efforts. There are no plans for scaling or adapting its work for greater impact.	The proposal makes incremental shifts in policies, institutions, or power structures; and has a loose connection to existing efforts. Plans for scaling impact are cursory.	The proposal makes demonstrated shifts in policies, institutions, or power structures; and has an established connection to existing efforts. Plans for scaling impact are cursory.	The proposal makes notable changes to policies, institutions, or power structures; and complements existing efforts, and includes detailed plans for scaling impact.	The proposal makes substantial shifts in policies, institutions, or power structures; and fills a crucial gap in existing efforts. It catalyzes the work of other organizations throughout their field. The proposal outlines a specific strategy for scaling impact and adapting the solution to new contexts.

◉▶ HOW TO SCORE THIS ELEMENT

Highest-ranked solutions (3-4) demonstrate an ability to shift policies, institutions, or power structures. Such solutions often build on existing work, and outline strategies for scaling impact and adapting the solution to new contexts. Mid-range proposals (2) may demonstrate an ability to shift certain policies, institutions, or power structures, and have an established connection to existing efforts. However, plans for scaling impact are cursory. Low-scoring proposals (0-1) do not articulate an intended shift in policies, institutions, or power structures. Plans to scale are cursory or nonexistent.

Conclusion

We developed the material contained in this guide to serve as a tool for any philanthropic funder interested in addressing structural inequality. It reflects more than a year of applied research, builds on dozens of existing frameworks, and incorporates the input of practitioners who tested the tool by using it to assess actual proposals provided by our partner at Lever for Change.

Our hope now is that by making this tool free and publicly available, we can equip more and more people with a way to systematically consider structural inequality in their funding decisions. For those who use the toolkit, we encourage you to share your experience with us at **impact@sp2.upenn.edu**. No matter how useful a rubric or scoring sheet is, it supports — not replaces — the good judgement of the individuals who use it. By sharing your experience using this toolkit, you can help ensure that subsequent versions of this guide reflect the collective judgment, tips, and advice of real-world users.

Methodology

Here we provide a high-level overview of how we developed this tool. For a more detailed discussion of our methodology, including our comparative analysis of the frameworks and rubrics our team reviewed, visit our website.

Analysis of Existing Frameworks and Rubrics

Our team began by reviewing more than 18 existing structural inequality frameworks (See https://www.impact.upenn.edu/toolkits/choosingchange) so that we could build on previous efforts and address any limitations for use in understanding structural inequality and assessing the potential of philanthropic proposals. To translate our understanding of structural inequality into criteria with which to assess proposals, we also reviewed rubrics and calls for proposals from philanthropic competitions and requests for proposals to identify common criteria across rubrics, along with criteria specific to dimensions of structural inequality. We reviewed 16 philanthropic prizes, including 100&Change's own evaluation criteria. (For a description of all frameworks and rubrics, see https://www.impact.upenn.edu/toolkits/choosingchange)

First-Draft Rubric Elements

Based on these insights, our team identified five first-draft rubric elements that could be used to assess a proposal's potential to counteract structural inequality. These draft elements were: Inclusivity, Durability of Power, Theory of Change, Direct Impact, and Systems-level Impact.

Faculty Review and Feedback

These first-draft rubric elements served as a basis for two rounds of one-on-one discussions with faculty at the University of Pennsylvania's School of Social Policy and Practice. The school's faculty has both a commitment to addressing structural inequality and expertise across specific cause areas, including housing; poverty alleviation; disconnected youth; and gender, race, and identity. During those interviews, the project team received feedback on our working definition of structural inequality, the initial elements of the rubric, and results from our team's internal testing of the rubric on real proposals. Faculty also called our attention to literature and frameworks that were not included in our initial scan.

External Reviews and Focus Groups

Our team revised the rubric based on faculty feedback. We then asked practitioners to test the second-draft rubric against real-world proposals to ensure it was fit for practical use. Evaluators were asked to conduct mock assessments of proposals from 100&Change and Equality Can't Wait, a prize that focuses on gender and inequity, and is administered by Lever for Change, an affiliate of the John D. and Catherine T. MacArthur Foundation. Evaluators who tested the rubric included: funders, advisory board members, and institutional partners of recent CHIP applied research projects; senior staff from shared funds who participated in CHIP's COVID-19 Dashboard Project; alumni of CHIP's High Impact Philanthropy Academy; and leaders of nonprofits that CHIP has previously profiled in donor guidance.

Our team then conducted focus groups to discuss evaluators' experience with applying the criteria. We sought feedback on the usefulness of the second-draft rubric, its strenths, and areas for improvement. Based on practitioners' feedback, we developed the final version of this rubric: We kept Inclusivity, Durability of Power, and Systems-Level Change; changed Theory of Change to Strength of Evidence; and changed Direct Impact to Organizational Capacity. We also provided new, sharpened questions within the categories to better guide users.

Endnotes

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Authors

Conor P. Caroll, MPA, Social Impact Fellow
Hanh La, MHS, PhD, Director, Applied Research & Analysis
Melissa Ortiz, MSEd, Applied Research Analyst
Katherina M. Rosqueta, MBA, Founding Executive Director
Emily Seeburger, Applied Research Analyst

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About the Center for High Impact Philanthropy

The Center for High Impact Philanthropy is a trusted source of knowledge
and education to help donors around the world do more good. Founded as
a collaboration between the School of Social Policy & Practice and alumni
of the Wharton School, it is the premier university-based center focused on
philanthropy for social impact.