

Questions to Shape an Equity Assessment and Create a People's Score

Rekha Balu, Karishma Furtado, Aravind Boddupalli, Judith Dangerfield, Jessica Pizarek, and Adriana Vance
February 2026

1. Define Policy Change Being Scored and Its Levers

- **How have current and historical policies in this policy issue area operated unfairly, whether intentionally or not?**
 - » What previous policies denied opportunity to a group by limiting eligibility, coverage, funding, or access based primarily on individual characteristics?
 - » When did policymakers not take action when a community or population needed assistance?
 - » What groups were disproportionately affected? How did different characteristics come together to shape intersectional experiences of advantage and disadvantage?
 - » What does research from different disciplines and perspectives say about who has been favored and disfavored by previous related policies?
 - » What mechanisms did previous policy design choices use to preserve privilege and advantage for some over others (e.g., mandating actions, limiting or delaying services)?
- **How will the program be implemented? What parts of the proposed bill could improve or harm fairness?**
 - » What practices or rules does the policy change? For whom?
 - » What levers does the policy use to potentially change outcomes? Do these changes address structures and systems that preserve advantage and disadvantage?
 - » Who is responsible for delivering services—does the policy change the sector, staff, or other actors?
 - » Does the policy change incentives or penalties? For whom?
 - » Does the policy make an action mandatory or incentivize voluntary adoption? For whom?
- **How is the proposed program funded?**
 - » Is the program or policy change funded annually, in a periodic reauthorization, or in a one-time appropriation?
 - » Is federal funding meant to be matched with local funding? To what extent does that disadvantage some localities and favor others?
 - » Is there sufficient funding or appropriations to deliver services described in the bill? If not, how will underfunding affect outcomes, and for whom?
 - » What is the pattern of funding over time? How does it keep pace with need?
- **Who is eligible or covered in the proposed program?**
 - » Does the policy change eligibility thresholds or coverage rates?
 - » If adoption or usage rates increase, who is covered? If they decrease, who is excluded?
 - » Does the government program or an intermediary determine eligibility and/or provide coverage?
 - » How much time do current eligibility decisions take? Who is waiting the longest?

2. Select Outcomes, Time Period, and Populations Based on Historical Disadvantage

- **How will groups be defined?**
 - » Based on knowledge of structural inequity related to the policy and issue area in question (step 1), how will you define “historically disfavored” and “historically favored”?

- » Given data availability and technical capacity, how will you measure favor and disfavor?
- » What is the evidence that such advantage and disadvantage depressed or limited well-being for some intersections or combinations of groups? (e.g., female farmers, disabled veterans)
- **To select the baseline year: When did this disadvantage begin? Has it been compounding or additive? Which cohorts were affected? Which cohorts could experience a different kind of policy going forward?**
 - » What type, amount, and duration of cumulative disadvantage should current policies respond to?
 - » What outcomes capture the impact of the policy in question on peoples' lives?
- **What outcomes could this policy affect that reflect well-being (e.g., health, financial security)?**
 - » How might related changes in program funding or access change those well-being outcomes?
- **What outcomes do affected populations and advocates typically discuss?**
 - » Are these outcomes that policies should be generally increasing (such as income) or generally decreasing (such as homelessness, maternal mortality, and so on)?
- **What outcomes will likely show changes across the population distribution versus outcomes that may show changes for one portion of the population?**
- **If providing simple tabulations or descriptive analyses, what numerators and denominators reflect relevant rates and comparisons (e.g., eligible population relative to total population; eligible disfavored group relative to total disfavored group)?**

3. Define Desired Equity Improvement

- **For outcomes that have been analyzed in the past, what is the evidence on the direction and size of differences in outcomes between previously measured groups?**
 - » What do current data or evidence show as the difference between that favored group and the disadvantaged/disfavored population targeted by the bill?
 - » Based on the outcomes selected, what is the desired direction of change? Is there a desired size of the average change or a desired level to reach that represents improvement toward fairness?
- **What is the extent of change that would need to happen on any of the three dimensions of equity—within, between, or across groups?**
 - » Would analysts expect equity improvements to happen in sequence—improvement within the disfavored group, improvement across all groups, then improvement between groups? Or something else?

4. Conduct Analysis and Produce Average Equity Scores

- **How does the desired change compare with the projected or actual change in outcomes? Do findings run counter to prior findings and benchmarks?**
- **For a given outcome, how does the desired versus actual change vary by type of equity improvement (within-group versus between-group)? Would the results differ if a different or intersectional equity lens were applied (e.g., if gender equity or disability equity were the focus versus racial equity)?**
- **What do mixed findings suggest in terms of whether the policy proposal is addressing the levers or causes of past disadvantage?**

5. Estimate Distribution of Equity Improvement: Analyze Distribution of Differences across Populations

- *How has the relevant population distribution changed over time? Is there greater concentration at the top or bottom?*
- *What proportion of population do the favored and disfavored groups represent in the past versus today? What is the relevant full population (e.g., all workers, all tax filers, all students)?*
- *Across the income distribution, how do equity improvement measures vary? Across a spatial distribution, how do equity improvement measures vary?*
 - » What does this variation suggest about whether people who face the same circumstances are bearing different burdens? (horizontal inequity)

These questions are included as appendix A in Rekha Balu, Karishma Furtado, Aravind Boddupalli, Judith Dangerfield, Jessica Pizarek, and Adriana Vance, *A Replicable Approach to Scoring Policy for How It Improves Fairness in Outcomes: A Proposed Methodology from the People's Score* (Washington, DC: Urban Institute, 2025).

Acknowledgments

This brief was funded by PolicyLink, as part of the People's Score, a major applied research project and partnership of PolicyLink and the Urban Institute. We are grateful to them and to all our funders, who make it possible for Urban to advance its mission. The views expressed are those of the authors and should not be attributed to the Urban Institute, its trustees, or its funders. Funders do not determine research findings or the insights and recommendations of Urban experts. Further information on the Urban Institute's funding principles is available at urban.org/fundingprinciples. Copyright © February 2026. Urban Institute. Permission is granted for reproduction of this file, with attribution to the Urban Institute.