

# Equality

Having addressed both order and liberty, we now arrive at the third primary value serving as a moral underpinning of our liberal democracy.<sup>1</sup>

**Question for Reflection #1:** Why is equality best saved to be the last of the three?

What Equality Means. Equality means sameness with respect to one or more of our human dimensions and characteristics, but not all such dimensions and characteristics. It corresponds to a greater level of sameness than *similar*, but less than being *identical*. So, for example, we generally consider touch football and tackle football to be similar, but not equal. And, in baseball, we consider the National League and the American League to be equal, but not identical, as they have slightly different norms and rules (e.g., at least until recently, the National League did not utilize designated hitters).

Differences don't necessarily imply inequality. If we say that two individuals or groups are equal with respect to a certain dimension, it means that we don't think any differences between them, whether apparent or not, are *significant*. Thus, if one twin boy measures 48" tall and the other twin measures 47" tall, we probably won't consider that difference, in and of itself, as significant and causing inequality. On the other hand, Disneyland may consider the twin who measures less than 48" tall as not meeting their height standard for the Star Wars ride, and thus deserving of unequal treatment (leaving it to the parents to handle the resulting frustration and jealousy).

The Necessity and Benefits of Inequality for Human Flourishing. As humans, we are different in so many ways, many of which are immediately apparent. True equality across multiple dimensions isn't possible, and isn't even desirable, as the progress of civilization is utterly dependent on our individual differences in capabilities, talents, interests, and effort. Before the startling teachings of Jesus, anyone arguing that we are all equal would likely have been considered delusional.

Since we live in a competitive world, the drive to create or increase inequality is actually an endemic social driver. We vie as individuals and as members of a group for recognition, influence, and respect, and, above all, the power to define for our social group, what is *right* and what is *best*. We all, unconsciously or not, try to win subtle status points, earn cultural affirmation, develop our tastes, promote our lifestyles, and advance ourselves and our group. In ways of which we're not necessarily even conscious, we are competing with others, seeking to overtake those who have higher standing than us and wall off those who are below. All of those micro-behaviors open up social distances that then, by the by, tend to open up economic and political gaps.<sup>2</sup>

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<sup>1</sup> The U.S. was intended to be a liberal democracy; this entire document comes from the perspective of liberal democracy. There is much here with which someone who leans towards authoritarianism would disagree.

<sup>2</sup> Bourdieu, Pierre, *Outline of a Theory of Practice*, 1977.

For example, in your upcoming economics sessions with Mr. Busby, you may be tasked with investing make-believe funds in different stocks, bonds, or real estate. At the end of the assignment period of time, each of you will have either made a profit or lost some part of your initial investment. Even though it is not set up as a competition, you will undoubtedly have a strong emotional reaction as you see who made more money than you, and who made less. The same will be true in real life. By the time of your class's ten-year reunion later, you will all have a different financial and social status, based on your degree choice, the jobs you took, your industriousness, your spending habits, etc. By graduating from Agoura High, you will have started off with a roughly equal status, but as a result of different capabilities and interests, your outcomes will be markedly different.

### Helpful Ways to Categorize and Measure the Levels of Equality and Inequality.

There are two basic lenses through which we can view equality to determine the nature and scope of equality in a society: realms and arenas. There are three primary realms and four primary arenas to consider:

Equality's Three Primary Realms. Equality can be subdivided into many different realms. The three that are most central to the workings of a liberal democracy tend to be social, economic, and political equality<sup>3</sup>:

#### Social Equality:

Definition: Social equality is the idea that all individuals in a society should have equal access to resources, opportunities, and social benefits, regardless of their background or characteristics. It involves the absence of discrimination or prejudice based on factors such as race, gender, socioeconomic status, or other social distinctions.

Social equality leads to greater cohesion and trust. In societies that are more equal socially, people are more likely to cooperate and engage in civic activities. Achieving relative social equality is more difficult in diverse, pluralistic societies.

Example: Efforts to achieve social equality might include policies and initiatives aimed at eliminating ethnic or religious discrimination, promoting diversity and inclusion, and ensuring equal access to education and healthcare. Affirmative action programs, anti-discrimination laws, and campaigns against social prejudices are often seen as contributing to the pursuit of social equality.

#### Economic Equality:

Definition: Economic equality/equity is underlain by the twin concepts that: (1) all individuals should have access to a level of economic resources, opportunities, and benefits adequate to live a secure and fulfilling life; and (2) no person should have control over such a substantial level of economic resources, opportunities, and benefits that they are able to excessively influence or dominate the lives of others. It

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<sup>3</sup> Additional realms of equality commonly recognized include: gender, cultural, educational, environmental, and legal.

involves addressing disparities in income, wealth, and economic well-being to create a more balanced distribution of economic resources within society.

Extensive research demonstrates that societies featuring citizens with greater economic equality are stronger societies. Individuals at all income levels in those societies are happier and healthier than those living in societies with greater inequality.<sup>4</sup>

Example: Progressive taxation, social welfare programs, and policies that aim to reduce income inequality are measures that promote economic equality. For instance, policies that ensure a minimum wage, affordable healthcare, and educational opportunities for all citizens are attempts to reduce economic equality.

#### Political Equality:

Definition: Political equality refers to the principle that all citizens in a liberal democracy should have the freedom of self-determination in making that society's collective and binding decisions. Regardless of their individual characteristics, they should be entitled to an equal voice in making the laws and rules under which they will live together as citizens. So, for example, every eligible citizen should have the right to vote, run for public office, and participate in political activities without differentiation.

Political equality implies that everyone has equal access to political rights and responsibilities, so, for example, each person's vote carries the same weight. The principle of one person, one vote is a fundamental component of political equality. Lincoln gave it perhaps the best definition of the political equality for which liberal democracy strives: government of the people, by the people, and for the people.

The purpose of democracy is to empower individual citizens and give them sufficient control over their lives to protect themselves from domination. In their ideal form, democracies empower each and all such that none can dominate any of the others, nor any one group, another group of citizens. Democracy can't exist without, at the least, a modicum of political equality. Sovereignty has to rest with the people, all the people, exercised through free, fair, regular, open, and determinative elections. For this to occur, the necessary institutions must be in place and the majority of people must believe that their fellow citizens are adequately qualified to participate on an equal footing in the process of governing the state.<sup>5</sup> Thus, to the extent that our political equality is flawed, so too is our democracy.

Example: Mail-in ballots are seen by some to promote equality of access to voting, since some people have health, economic, or other restrictions that make it difficult for them to come to a polling place on election day.

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<sup>4</sup> Wilkinson, Richard, and Kate Pickett, *The Spirit Level: Why Greater Equality Makes Societies Stronger*, 2009. These results parallel other research demonstrating that people living in liberal democracies tend to be happier, healthier, and more prosperous than those living in autocratic societies

<sup>5</sup> Dahl, Robert A., *Democracy and its Critics*, 1989, p. 31.

Equality's Four Primary Arenas. There are also different arenas in which we can look to see if equality has been achieved, including equality of: status, resources, opportunities, and outcomes. Each of these arenas implies actions that society or government can take, all of which have their proponents and detractors.

1. Status.

Definition: Equality of status refers to the idea that all individuals in a society have the same social standing, recognition, and treatment. It emphasizes the absence of discrimination or hierarchical distinctions based on characteristics such as race, gender, ethnicity, religion, or other personal attributes. In a system characterized by equality of status, individuals are afforded equal dignity, respect, and consideration.<sup>6</sup>

Example: Discrimination and bigotry based on race, gender, sexual orientation, or other characteristics usually lead to unequal status in society. Some argue that racism in the U.S. actually constitutes a caste system, reminiscent of India's treatment of the Dalits and the Nazis' treatment of Jews.<sup>7</sup> In societies with a caste system, individuals are born into specific social groups that determine their status. Individuals may face social stigma, prejudice, and unequal treatment, impacting their status and opportunities, that is based on birth rather than individual merit.<sup>8</sup>

2. Resources.

Definition: Equality of resources involves the fair distribution of material and economic resources within a society. The goal is to ensure that individuals have access to similar levels of wealth, income, education, healthcare, and other resources that contribute to their well-being. This perspective aims to minimize economic disparities and provide a more equitable foundation for individuals to pursue their goals by ensuring that all individuals have access to the resources they need to pursue their life goals and values.<sup>9</sup>

Example: Guaranteed Minimum Income (GMI) is a social-welfare approach that would guarantee all individuals or families an income sufficient to live on, provided that certain eligibility conditions are met, typically: citizenship; a means test; and either availability to participate in the labor market, or willingness to perform community service.

3. Opportunity.

Definition: Equality of opportunities focuses on ensuring that all individuals have an equal chance to succeed in life, regardless of their background or starting point. It involves removing barriers to advancement, such as discrimination, unequal access to education, and social or economic inequalities. The emphasis is on creating a level playing field where everyone has the same opportunities to develop their skills,

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<sup>6</sup> As advocated by John Rawls and others. See his *A Theory of Justice*, 1971.

<sup>7</sup> Wilkerson, Isabel, *Caste: the Origins of Our Discontents*, 2020.

<sup>8</sup> Think back to our Session 1 discussion of the principle that one's birth shouldn't determine one's fate.

<sup>9</sup> As advocated by Ronald Dworkin and others. See his *Sovereign Virtue: the Theory and Practice of Equality*, 2000.

pursue education, and participate in various aspects of society. Equality of opportunity requires that factors outside the person's control not be determinants of who receives advantageous positions.<sup>10</sup> As John Rawls wrote, "Those who are at the same level of talent and ability, and have the same willingness to use them, should have the same prospects of success regardless of their initial place in the social system."

Example 1: Disparities in access to quality education can result in unequal opportunities. Students from economically disadvantaged backgrounds may lack resources and face barriers that hinder their educational advancement, limiting their future opportunities and outcomes.

Example 2: Discriminatory hiring practices that favor certain demographic groups tend to lead to unequal opportunities in the workforce. One approach would be to erase preferences given to candidates on the basis of factors that are irrelevant to their ability to perform the job. These may include biased recruitment processes, wage gaps, and limited career advancement for certain individuals (e.g., the "glass ceiling").

#### 4. Outcomes

Definition. Equality of outcomes pertains to achieving similar capabilities and end results for all members of society. Policies aimed at equality of outcomes may involve redistributive measures to address existing inequalities and ensure that individuals have comparable income, healthcare, and quality of life.<sup>11</sup>

Example: Individuals facing socio-economic challenges may experience poorer health outcomes compared to those with better access to healthcare resources. Medicare, Medi-Cal, and even universal health care are among the different approaches for seeking consistent health outcomes across different socio-economic groups.

**Question for Reflection #2:** If the three realms correspond to rows, and the four arenas correspond to columns, which of the cells in the resulting 3 x 4 matrix do you consider most important and least important for our liberal democracy?

The Ideal of Equality in the U.S., as Seen in our Foundational Documents. The paradox is that, in spite of all of our differences, both our individual lives and our success as a democracy depend upon us acting consistent with a belief that, in certain core respects, we are all equal.

Any understanding of the ideal of equality in the U.S. needs to start with the Declaration of Independence. After many ineffective and ultimately futile efforts at reconciliation, (e.g., Declaration of Rights and Grievances—1765; Olive Branch Petition—1775) the Founders

<sup>10</sup> As advocated by: John Rawls *A Theory of Justice*, 1971; Amartya Sen in *Equality of What*, 1980; G.A. Cohen in *If You're an Egalitarian, How Come You're so Rich*, 2000; and Martha Nussbaum in a variety of works.

<sup>11</sup> As advocated by, among others, various feminist philosophers and authors, as well as by John Roemer in *A General Theory of Exploitation and Class*, 1982, which examines how to achieve equality in the distribution of economic outcomes.

recognized that the colonies needed to be a free and equal state, because the King would not treat the colonists as free and equal Englishmen. He was, with respect to the colonies, at least, a tyrant.<sup>12</sup>

As is well known, the Continental Congress tasked Jefferson with the responsibility of drafting a situation-specific declaration of the colonies' independence. What he returned with, however, included a timeless statement of values, a statement of a permanent ideal that we have been striving to live up to ever since.<sup>13</sup>

Jefferson centered the document's considerations of equality on two interconnected declarations:

1. In the very first sentence he announced that the colonies were assuming a "separate and equal station" with England and all other nations in the world. He argues that "the laws of nature and of nature's God entitle" the former colonies to assume their status as a new country. Further, he argues that those same laws entitle the new country to the same status and possession of the same rights and powers as all other countries. Thus, all countries are created equal with at least an equal political status. (Clearly, at that time, we were not of equal social or economic status with England, nor was that necessary to his validity of his announcement.)

2. In the second sentence he declared that the laws of nature and of nature's God also specify that "all men are created equal," and thus also have an equal status. It is clear that Jefferson believed that the individual American's social, economic, and political equality was greater than that of the English themselves, but we cannot specify much further what the ideal really meant, as the document provides few details and the record outside of the document is contradictory.

The exact nature of the equality declared in the document itself, as well as the practices of the Founders, was clouded by their blind spots, intolerance, and bigotry.<sup>14</sup> The American colonists rebelled against the Crown in great part because King George was not treating them as equals with his subjects who still resided in the British Isles. But many of the white male settlers in areas of the New World that became the United States treated Native Americans, Black Americans, and women as of inherently lesser worth. It is not hard to argue that many white male colonists tended to treat others in some ways worse than King George treated them. (We may want to temper the harshness with how we view the flaws in the Founders' ideal and practices of equality, however, unless we are willing to have future generations look just as harshly at our own.<sup>15</sup>)

**Question for Reflection #3:** Given all of our differences, when Jefferson and the other signers of the Declaration of Independence declared that all humans are equal, what do you think they actually meant?

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<sup>12</sup> We rebelled against authoritarianism in 1776; given our continued strong belief in equality almost 250 years later, why would we want to see it re-established today?

<sup>13</sup> The Declaration of Independence amalgamated elements of natural law theory<sup>13</sup> and social contract theory,<sup>13</sup> both of which had been developing for several hundred years. It also reflected ideas developed in a series of documents drafted by a number of colonists, including John Adams, George Mason, Richard Henry Lee, and others. It had significant antecedents, but was still a remarkable achievement.

<sup>14</sup> Defining bigotry broadly, as an obstinate or unreasonable attachment to a belief, opinion, or irrational fiction, in particular prejudice against a person or people on the basis of their membership in a particular group.

<sup>15</sup> Just as we, due to the passage of time, are better able than the Founders to see their flaws, future generations will be better able to see ours.

The Articles of Confederation and the Constitution were early, provisional, and imperfect embodiments of the Declaration's ideal. It would be unrealistic to expect a new nation to reach its ideal at once.<sup>16</sup>

The Constitution, as originally adopted, did not focus on equality. It promoted social equality by stating, in Article 1, that "No Title of Nobility shall be granted by the United States," but was tragically flawed by the 3/5ths Compromise.

Four generations later, Lincoln felt that America had temporized with slavery too long, such that it became our great historical weakness.<sup>17</sup> In his Gettysburg address, Lincoln called for "a new birth of freedom"—really a new birth of equality—by tracing its first birth to the Declaration of Independence (which called all men equal) rather to the Constitution (which tolerated slavery). His characterization of the Declaration's assertion as a "proposition" is telling, as a proposition cannot be proven (thus, it must be *held* to be true), but asserts that no other possible position is logical.<sup>18</sup> Lincoln made it clear, in a way the Declaration did not, that he was including all men. He was not restating the Declaration; instead he was providing what he believed was the definitive interpretation for the country going forward.

When, in his Second Inaugural, he called on a united people "to finish the work we are in," he was referring not to the war, but to the Declaration's dedication to the "proposition that all men are created equal."<sup>19</sup> He and the country carried through with that new, definitive interpretation, and the work it created, with the 13th, 14th, and 15th Amendments—remedying the Constitution's deep design flaws with respect to race and equality. The 14th was a truly radical revision to the basic structure of the American republic. Its first sentence declared that all persons born or naturalized in the U.S. are citizens; thus, there will be no perpetual outsiders, no hereditary exclusion from our political community.

Subsequent generations, regardless of political ideology, have amplified on Lincoln's definitive interpretation, emphasizing the importance of our belief in that ideal. For example, "Whether we come from poverty or wealth," President Reagan said, "we are all equal in the eyes of God. But as Americans that is not enough. We must be equal in the eyes of each other."

Equality of Concern as an Object of Government. An overarching goal of society and the state is to achieve as flourishing a society as possible.<sup>20</sup> Thus, it is important, both morally and objectively, that lives in that society be as successful in a positive direction as possible, not wasting potential.<sup>21</sup> Thus, it is also important that, from those same moral and objective points of view, that each human life flourish, being the best it can be.<sup>22</sup>

<sup>16</sup> Dahl, *Democracy and its Critics*, pp. 101, 109. Extracted from the writings of Theodore Parker, a transcendentalist and abolitionist who influenced Lincoln.

<sup>17</sup> Dahl, p. 116.

<sup>18</sup> Adler, Mortimer, and William Gorman, *The American Testament*, p. 124 and the *Merriam-Webster Dictionary*.

<sup>19</sup> Dahl, p. 189.

<sup>20</sup> Harris, Sam, *Science Can Answer Moral Questions*, YouTube Video, <https://www.youtube.com/watch?v=Hj9oB4zpHww>.

<sup>21</sup> Including non-human lives, too, but we will focus just on human lives here.

<sup>22</sup> Ronald Dworkin, *Sovereign Virtue: The Theory and Practice of Equality*, 2002.

It can be argued that, as humans, we have only two necessary needs: freedom and well-being. If we don't have *freedom*, we are externally constrained from acting purposefully to achieve our goals and realize the benefits thereof (i.e., meeting all of our other needs). If we don't have *well-being*, we are internally constrained from acting purposefully to achieve our goals and realize the benefits thereof.<sup>23</sup> All of our other—and therefore contingent—needs flow from these two necessary needs.

Unless these two necessary needs are satisfied, so that the commensurate contingent needs can be met, a person can't continue as fully human.<sup>24</sup> Thus, we have an inalienable *right* to both freedom and well-being.

If one accepts these premises, then a primary, if not *the* primary, role of government is to show a commensurate concern for the fate of each of its citizens.<sup>25</sup> Thus, we all should be *equal* as objects or recipients of that concern.

Continuing Concern with Equality in the U.S. In spite of the ideal, from almost any perspective, our commitment to and practice of equality is more fraught in the U.S. than in similar countries (Norway and Canada, for example). Our glorified ideals and our practices have been in serious conflict ever since our earliest days as a nation. By most measures, the gap has narrowed, but is still so wide that, at times, it seems almost unbridgeable. Our unresolved issues with respect to equality include, among others: racism; the content, quality, and level of state-provided education; the poverty suffered by so many children; lack of economic mobility; taxation of inherited wealth; treatment of LBGQT people; one person-one vote issues; oppression of women; and different ethnicity/religious beliefs and practices.

**Question for Reflection #3:** Why do you believe equality continues to be especially problematic in the U.S.?

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<sup>23</sup> White, Alan, *If You Can Understand This Essay, Then You Have Moral Rights and Moral Duties*, 2020, pp. 3-4; <https://www.degruyter.com/document/doi/10.1515/opphil-2020-0011/html>; based on the work of Alan Gewirth.

<sup>24</sup> This may well mean that all of our other rights flow directly from these two. Thus, from *freedom* would flow such rights as freedom of speech, thought, assembly, petition, and privacy. From *well-being* would flow such rights as education, health care, and universal basic income.

<sup>25</sup> So that, as we discussed in Session 1, one's birth doesn't determine one's fate.