



Michigan Nonprofit Association

# Diversity, Inclusion and Equity Toolkit

PILOT

Developed by

**NEW**

nonprofitnetwork



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\*The Stronger Communities Diversity and Inclusion Pilot Project intentionally focuses on the perspectives of the organization’s executive director and board leadership. Plans are underway to apply a comprehensive, holistic approach to this work, recognizing that change of this nature is most effective when the entire organization is involved including staff, the executive director and the board.

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## GLOSSARY OF TERMS

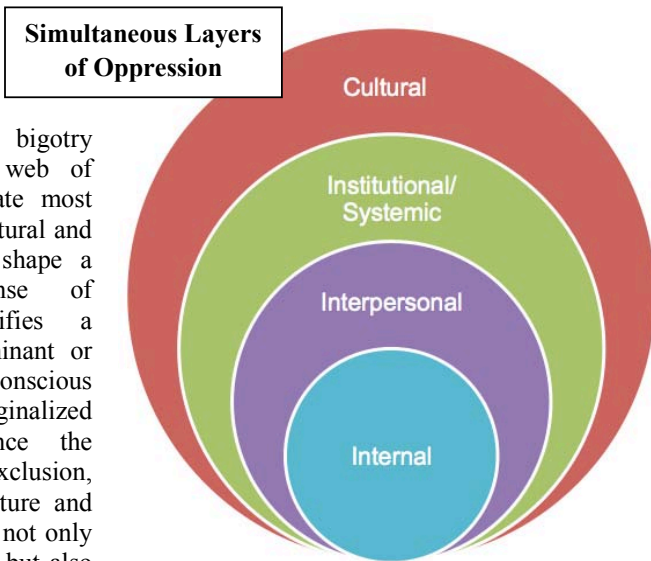


Image courtesy of: *Building the Bridge for Diversity and Inclusion: Testing a Regional Strategy*, Rosenberg, Wooten, McDonald, and Burton

1. **Diversity** - Being composed of a demographic mix of an intentional collection of people, taking into account elements of difference across national origins, languages, ethnicities, races, skin colors, cultures, generations, religions, spiritualities, socio-economic backgrounds, gender identities and sexual orientations, as well as different skills, abilities, customs, values, behavioral styles and beliefs.<sup>i</sup>
  - a) **Race and Ethnicity:** *Race* refers to a person’s physical appearance and *ethnicity* refers to one’s nationality, ancestry, culture, and language. In 1997, the U.S. Office of management and Budget designated Hispanic/Latino as an ethnicity category, separate from race, which included American Indian or Alaska Native, Asian, Black or African American, Native Hawaiian or Other Pacific Islander, and White.
  - b) **Sexual Orientation:** refers to an individual’s physical and/or emotional attraction to the same and/or opposite gender.<sup>ii</sup> Different sexual orientations can include, lesbian, gay, bisexual, queer, questioning, or straight.
  - c) **Gender identity:** refers to a person’s internal sense of being male, female or something else, which may or may not correspond to the person’s body or designated sex at birth (meaning what sex was originally listed on a person’s birth certificate). **Transgender** is an umbrella term for people whose gender identity, expression or behavior is different from those typically associated with their assigned sex at birth, including but not limited to transsexuals, cross-dressers, androgynous people, and gender non-conforming people. **Intersex** refers to a sex assigned at birth for individuals exhibiting characteristics (such as reproductive or sexual anatomy and/or chromosomes) of both birth-assigned males and females.<sup>iii</sup>
  - d) **Dis/ability:** refers to a variety of individuals who may or may not use this specific term to describe themselves or their experiences, encompassing a broad range of dis/abilities that may be perceptual, illness-related, physical, developmental, psychiatric, mobility-related or environmental.
  - e) **Age:** refers to the length of time that one has existed on the planet, their duration of life.
  - f) **Class:** refers to a group of persons sharing a similar social position and certain economic, political, and cultural characteristics. **Social class** is a status hierarchy in which individuals and groups are classified on the basis of esteem and prestige acquired mainly through economic success and accumulation of wealth.<sup>iv</sup>
  - g) **Religion/Spirituality:** refers to human beings’ relation to that which they regard as holy, sacred, absolute, spiritual, divine, or worthy of especial reverence. It is also commonly regarded as consisting of the way people deal with ultimate concerns about their lives and their fate after death. In many traditions, this relation and these concerns are expressed in terms of one’s relationship with or attitude toward god(s) or spirits; in more humanistic or naturalistic forms of religion, they are expressed in terms of one’s relationship with or attitudes toward the broader human community or the natural world.<sup>iv</sup> **Spirituality** is an individual’s understanding of, experience with, and connection to that which transcends the self.
  - h) **National Origin:** refers to a nation where a person is from. National origin discrimination occurs when someone is treated less favorably because he or she comes from a particular place, because of his or her ethnicity or accent, or because it is believed that he or she has a particular ethnic background.
2. **Inclusion** – The full engagement of individuals sharing power at all levels of an organization. All members are valued, respected and supported. The act of inclusion is reflected in an organization’s culture, practices and relationships that support a diverse workforce and is an intentional demonstration that counters the historical exclusion of underrepresented communities. Inclusive organizations ensure equal and full participation in decision-making processes by considering all views. While a truly “inclusive” group is necessarily diverse, a “diverse” group may or may not be “inclusive.”<sup>iv</sup>
3. **Equity** - The presence of justice and fairness within the procedures, processes, and distribution of resources by institutions or systems. Facing equity issues requires an understanding of the underlying or root causes of inequalities and oppression within our society.<sup>v</sup>

## GLOSSARY OF TERMS

4. **Bias** - Prejudice; an inclination or preference, especially one that affects fair judgment.<sup>vi</sup>
5. **Cultural blindness** - The belief in treating everyone “equally” by treating everyone the same. It is based on the presumption that differences are by definition bad or problematic, and therefore best ignored. Cultural blindness can be applied to identity characteristics such as sexual orientation, gender identity, ability, etc. One who is culturally blind may say, “I don’t see sexual orientation” “Colorblindness” may also be used to describe the mentality of “not seeing race or color.”<sup>vii</sup>
6. **Discrimination** - The unequal treatment of members of a group because of their race, gender identity and expression, social class, sexual orientation, physical ability, ability, religion and/or other categories.<sup>viii</sup>
7. **“ISMs”** - A way of describing any attitude, action or institutional structure that oppresses a person or group because of their target group, examples may include but are not limited to race/ethnicity/color (racism), gender (sexism), economic status (classism), age (ageism), religion (e.g. anti-Semitism), sexual orientation (heterosexism), ability (ableism), language/immigration status (xenophobia), gender identity/expression (transphobia).<sup>ix</sup>
8. **Marginalized** - Excluded, ignored, or placed in a powerless position within a group, society, or community.<sup>x</sup>
9. **Microaggression** - Brief and common daily verbal, behavioral, or environmental indignities, whether intentional or unintentional, that communicate hostile, offensive, or negative slights and insults towards people of other races, ages, gender identities, sexual orientations, physical or mental abilities, etc.<sup>xi</sup>
10. **Oppression** -. An unjust system that disadvantages one social identity group over another, maintaining inequity. Oppression fuses institutional and systemic discrimination, personal bias, bigotry and social prejudice in a complex web of relationships and structures that saturate most aspects of life. Oppression denotes structural and material constraints that significantly shape a person’s life chances and sense of possibility. Oppression also signifies a hierarchical relationship in which dominant or privileged groups benefit, often in unconscious ways, from the disempowerment of marginalized or targeted groups, who experience the consequences of discrimination, exclusion, deprivation, exploitation, control of culture and sometimes violence. Oppression resides not only in external social institutions and norms but also within the human psyche. Eradicating oppression ultimately requires struggle against all its forms, and at all levels, and building coalitions among diverse people offers promising strategies for challenging oppression systematically.<sup>xii</sup>
11. **Social Power** - The degree of influence and access to resources that an individual or organization has amongst peers and within society.<sup>xiii</sup>



## GLOSSARY OF TERMS

12. **Prejudice** - The act of forming an opinion toward another group and its members prior to considering all available information. Such attitudes are typically based on unsupported generalizations or stereotypes that deny the right of individual members of certain groups to be recognized and treated as individuals with distinct characteristics.<sup>xiv</sup>
13. **Privilege** - A right, advantage, or benefit that only some people have because of their social group memberships, including access to resources or institutions. The following examples list the dominant/agent groups and the marginalized/target groups: white people with respect to people of color, men with respect to women and transgender individuals, straight people with respect to gay, lesbian and bisexual individuals, adults with respect to youth and elders, and wealthy people with respect to people of low income. Because hierarchies of privilege exist, even within the same group, people who are part of the group in power may consciously or subconsciously deny that they have privilege even when evidence of differential benefit is obvious.<sup>xv</sup>
14. **Social Identity** - The ways in which one characterizes oneself, the similarities one has with others, the ways one has learned to behave in stereotyped social settings, the things one values in oneself and in the world, and the norms that one recognizes or accepts governing everyday behavior.<sup>xvi</sup>
15. **Stereotype** - A set of inaccurate and simplistic beliefs about a group of people in which all individuals in the group are labeled and often treated based on perceived group characteristics.<sup>xvii</sup>
16. **Tokenism** - The practice of making an obligatory effort or symbolic gesture of the inclusion of members of an underrepresented group in order to deflect criticism or comply with affirmative action rules. Also, the dominant/majority group may tokenize an individual by expecting that she or he represent and/or speak on behalf of an entire cultural group.<sup>xviii</sup>

## GLOSSARY OF TERMS

- 
- <sup>i</sup> Council of Michigan Foundations (CMF) & D5.
- <sup>ii</sup> Human Rights Campaign
- <sup>iii</sup> Resource was compiled from existing resources provided by the Human Rights Campaign, National Center for Transgender Equality and Intersex Society of North America
- <sup>iv</sup> E. Achugbue, A Glossary of Diversity Terms from <https://our.ptsem.edu/UploadedFiles/Multicultural/MCRDiversityTerms.pdf> (2003), K. Cain, A Glossary Of Diversity Terms For Dissertation Research. (Grand Canyon University, 2012), CMF & D5.
- <sup>v</sup> D5.
- <sup>vi</sup> Resource was compiled from existing resources provided by the National Conference for Community and Justice, Oregon State University, Arizona State University – Intergroup Relations Center, and The National Center for Transgender Equality.
- <sup>vii</sup> National Conference for Community and Justice & the National Center for Transgender Equality.
- <sup>viii</sup> Institute for Democratic Renewal and Project Change Anti-Racism Initiative. A Community Builder’s Tool Kit, W.K. Kellogg Foundation: Racial Equity Resource Guide, M. Potapchuk MP Associates and S. Leiderman, Racial Equity Tools from [www.racialequitytools.org](http://www.racialequitytools.org), Center for Assessment and Policy Development & NEW.
- <sup>ix</sup> Institute for Democratic Renewal and Project Change Anti-Racism Initiative, W.K. Kellogg Foundation & NEW.
- <sup>x</sup> National Conference for Community and Justice & the National Center for Transgender Equality.
- <sup>xi</sup> D. Wing Sue, *Microaggressions in Every Day Life: Race, Gender, and Sexual Orientation* (Hoboken, New Jersey: John Wiley & Sons, Inc., 2010).
- <sup>xii</sup> 1) M. Adams, L.A. Bell, and P. Griffin, *Teaching for Diversity and Social Justice: A Sourcebook*. (New York: Routledge 2007), W.K. Kellogg Foundation: Racial Equity Resource Guide, NEW & Prilleltensky and Nelson (2002) 12.
- <sup>xiii</sup> M. Adams, L.A. Bell, and P. Griffin, W.K. Kellogg Foundation: Racial Equity Resource Guide & NEW.
- <sup>xiv</sup> Institute for Democratic Renewal and Project Change Anti-Racism Initiative & W.K. Kellogg Foundation.
- <sup>xv</sup> National Conference for Community and Justice, Institute for Democratic Renewal and Project Change Anti-Racism Initiative, W.K. Kellogg Foundation & NEW.
- <sup>xvi</sup> National Conference for Community and Justice and the National Center for Transgender Equality.
- <sup>xvii</sup> E. Achugbue 1, G. Brock, *Diversity terms* (2012) & K. Cain. 1.
- <sup>xviii</sup> E. Achugbue 1, G. Brock, *Diversity terms* (2012) & K. Cain. 1, Western States Center, *Uniting Communities: The Toolkit* (2012) & NEW.

## NONPROFIT DIVERSITY, INCLUSION AND EQUITY ASSESSMENT INSTRUCTIONS

### Description

The Nonprofit Diversity, Inclusion and Equity Assessment is designed to help nonprofit organizations assess their capacity and progress in demonstrating best practices in diversity, inclusion and equity. The underlying assumption of this assessment is that all organizations will move back and forth along a continuum of best practices. The framework and the descriptions in the grid were developed based on the input of nonprofit experts and practitioners, literature regarding best practices, and the collective experience of the framing partners. For a list of acknowledgements and appreciations for contributions to these best practice actions, please see Appendix E.

There are two forms: **one for board members and one for executives and staff**. The reader scores the extent to which their organization effectively demonstrates each best practice on a four-point scale.

The grid may be used by nonprofit managers, staff, board members, external capacity builders and funders in the following ways:

- To identify those areas of capacity relative to diversity, inclusion and equity that are strongest and those that need further advancement, which could inform the development of a diversity and inclusion action plan for organizational improvement in this area. Please see Diversity and Inclusion Action Plan Template included in Appendix B.
- To measure changes in an organization's progress towards effectively building and sustaining diversity, cultivating inclusive environments and creating social equity.
- To serve as a starting point for discussions among those in the organization by drawing out different views regarding diversity, inclusion and equity. Different responses to the grid among staff, board members and funders, for example, can be a valuable discussion-starter within an organization.

This assessment is intended as a starting point for organizations committed to diversity, inclusion and equity. It may be useful to adapt the grid to reflect your own culture and diversity, inclusion and equity goals. Best practices, organizational capacity, diversity, inclusion and equity are complex concepts sensitive to local conditions and subject to multiple interpretations. We hope the instruments help facilitate open discussions of these issues that serve to construct shared meanings among those involved in the organization, and to assess progress over time. The scores are meant to provide a general indication where an organization locates itself in its lifecycle and journey towards building and sustaining a diverse, inclusive and equitable organization. Furthermore, the results of the exercise should be interpreted in the context of the organization's stage of development, level of capacity, geographic region, mission area, and constituency.

## Instructions

### **GUIDELINES FOR SURVEY ADMINISTRATORS**

Provide respondents a time reference for their assessments; for example, you may ask them to judge as of today, the beginning of last year, three years ago, etc. Select the person or people you want to complete the assessment (assessors); these may include nonprofit staff members, board members, funders, or other external parties including consultants. Assessors should have good knowledge of the organization for all points in time chosen for the assessment.

### **GUIDELINES FOR THOSE FILLING OUT THE SURVEY (ASSESSORS)**

Please write the date you are conducting the assessment at the top of the form.

For each item, you are being asked to judge the extent to which your organization demonstrates that practice: not at all, small, moderate, or large extent. Please circle the number (1 to 4) that corresponds to your best judgment. This is your judgment; there is no “right” answer. If you judge an item to not apply to your organization, circle “NA” in the last column.

### **SCORING THE ASSESSMENT**

1. Add the total number of circles in each column and record them in row “a” at the bottom of the assessment.
2. Following the instructions in row “b,” multiply the column totals by the numbers indicated and write the result in row “c.” The total number of circles in the “not at all” column will be multiplied by 1. The total number of circles in the “to a small extent,” column will be multiplied by 2. The total number of circles in the “to a moderate extent” column will be multiplied by 3. The total number of circles in the “to a great extent” column will be multiplied by 4. “NA” responses receive no score.
3. Add up the total number of points in each column and write the sum in row “d.” This is the final score for the assessment.
4. Use the final score to identify your organization’s point on the continuum of Pathfinder, Driver, Leader and Mentor.



# Nonprofit Diversity, Inclusion, and Equity Assessment

## List of Categories and Subcategories:

Board of Directors	Chief Executive Officer/Executive Director and Staff
<ol style="list-style-type: none"> <li><b>1. Organizational Development</b> <ul style="list-style-type: none"> <li>• Culture</li> <li>• Values and Guiding Principles</li> </ul> </li> <li><b>2. Internal Systems</b> <ul style="list-style-type: none"> <li>• Administrative Policies and Operational Practices</li> </ul> </li> <li><b>3. Governance</b> <ul style="list-style-type: none"> <li>• Board Composition</li> <li>• Recruitment</li> <li>• Capacity Building/Training</li> </ul> </li> <li><b>4. Human Resources</b> <ul style="list-style-type: none"> <li>• Policies</li> <li>• Procedures</li> <li>• Staff &amp; Volunteers</li> <li>• Vendors</li> </ul> </li> <li><b>5. Strategy</b> <ul style="list-style-type: none"> <li>• Strategic Planning</li> <li>• Programs &amp; Services</li> <li>• Collaborations &amp; Community Outreach</li> <li>• Marketing, Branding and Communications</li> <li>• Fundraising and Revenue Generation</li> </ul> </li> <li><b>6. Performance Management</b> <ul style="list-style-type: none"> <li>• Performance Measurement</li> <li>• Evaluation</li> <li>• Research</li> </ul> </li> <li><b>7. Additional Activities</b></li> </ol>	<ol style="list-style-type: none"> <li><b>1. Organizational Development</b> <ul style="list-style-type: none"> <li>• Culture</li> <li>• Values and Guiding Principles</li> </ul> </li> <li><b>2. Internal Systems</b> <ul style="list-style-type: none"> <li>• Administrative Policies and Operational Practices</li> </ul> </li> <li><b>3. Human Resources</b> <ul style="list-style-type: none"> <li>• Policies</li> <li>• Procedures</li> <li>• Staff &amp; Volunteers</li> <li>• Vendors</li> </ul> </li> <li><b>4. Strategy</b> <ul style="list-style-type: none"> <li>• Strategic Planning</li> <li>• Programs &amp; Services</li> <li>• Collaborations &amp; Community Outreach</li> <li>• Marketing, Branding and Communications</li> <li>• Fundraising and Revenue Generation</li> </ul> </li> <li><b>5. Performance Management</b> <ul style="list-style-type: none"> <li>• Performance Measurement</li> <li>• Evaluation</li> <li>• Research</li> </ul> </li> <li><b>6. Additional Activities</b></li> </ol>

Date of Assessment:

Name of Assessor(s):

Board of Directors							
Nonprofit Management Category	Sub-category	Best Practices	Not at all	To a small extent	To a moderate extent	To a great extent	Not Applicable
<b>Organizational Development</b>							
	Culture	Our organization's board:					
	1	Agrees on the meanings of diversity, inclusion, and equity.	1	2	3	4	NA
	2	Ensures a welcoming environment with spaces, signs and materials with diverse images, such as: people of all ages and racial backgrounds, same-sex couples, transgender people, people with disabilities and/or rainbow stickers.	1	2	3	4	NA
	3	Creates a safe environment to discuss difficult issues related to diversity, inclusion, and equity.	1	2	3	4	NA
	4	Openly talks about organizational power dynamics, including members' privilege and status, as they relate to diversity, inclusion and equity.	1	2	3	4	NA
	Values, Guiding Principles	Our organization's board:					
	5	Publicly shares clear messages supporting diversity, inclusion, and equity, such as: including policy statement of diversity and inclusion on website, office spaces, and publicity materials.	1	2	3	4	NA
	6	Guides the implementation of policies supporting diversity, inclusion, and equity.	1	2	3	4	NA

Internal Systems							
	Administrative Policies and Operational Practices	Our organization's board:					
	7	Develops formal policies promoting diversity, inclusion and equity for board recruitment and operations.	1	2	3	4	NA
	8	Maintains policies to effectively address all discrimination complaints.	1	2	3	4	NA
	9	Implements a whistleblower policy.	1	2	3	4	NA
	10	Implements a conflict of interest policy.	1	2	3	4	NA
	11	Ensures organizational compliance with the Americans with Disabilities Act, including building accessibility requirements.	1	2	3	4	NA
	12	Authorizes a unisex bathroom that is safe for transgender and gender nonconforming people.	1	2	3	4	NA
	13	Acknowledges days of religious, spiritual and cultural observance when setting board meeting schedules and events.	1	2	3	4	NA
	14	Develops a conflict resolution process for the board.	1	2	3	4	NA
Governance							
	Board Composition	Our organization's board:					
	15	Seeks ways to meaningfully increase the diversity of its board composition across all lines of difference.	1	2	3	4	NA
	16	Regularly assesses board member composition.	1	2	3	4	NA
	Recruitment	Our organization's board:					
	17	Creates recruitment plans to actively target populations that are not represented on the board.	1	2	3	4	NA

	18	Builds meaningful relationships with groups representing diverse populations to support recruitment efforts.	1	2	3	4	NA
	Capacity Building/ Training	Our organization's board:					
	19	Develops processes to retain new board members from diverse groups, such as a mentorship program, the investment of time to build meaningful relationships amongst board members, and exit interviews.	1	2	3	4	NA
	20	Provides professional development opportunities for board members in diversity, inclusion and equity issues.	1	2	3	4	NA
	21	Regularly includes diversity, inclusion and equity issues in board meeting agendas.	1	2	3	4	NA
	22	Incorporates diversity, inclusion, and equity training in new board member orientation processes.	1	2	3	4	NA

Human Resources							
	Policies	Our organization's board:					
	23	Includes "sexual orientation" and "gender identity and expression" in equal employment opportunity, nondiscrimination and anti-harassment policies.	1	2	3	4	NA
	24	Provides equal access for all employees and their families to employment benefits, if offered by the nonprofit. Benefits could include health insurance for domestic partners and their children; bereavement policies that include same-sex partners and extended family; maternity leave for mothers and their partners, including those who adopt; and health coverage that includes benefits for transgender employees, including hormone replacement therapy, gender confirmation surgery, and medical leave.	1	2	3	4	NA
	25	Has a zero-tolerance anti-bullying policy.	1	2	3	4	NA
	Procedures	Our organization's board:					
	26	Is explicit about organization's commitment to diversity and inclusion when hiring the CEO/ED.	1	2	3	4	NA
	27	Contracts executive search firms, when needed, with proven success in building diverse candidate pools.	1	2	3	4	NA
	28	Ensures organizational written forms offer at least three gender/sex categories, such as "male," "female," "transgender," or "self-identify."	1	2	3	4	NA
	29	Reviews the recruitment, retention and career development measures for employees, especially regarding diversity.	1	2	3	4	NA

	Vendors	Our organization's board:					
	30	Ensures organization contracts with vendors and providers who are committed to diversity, inclusion and equity, especially those owned by women, people of color, youth, or people who are differently-abled or lesbian, gay, bisexual, transgender, queer and intersex (LGBTQI).	1	2	3	4	NA
<b>Strategy</b>							
	Strategic Planning, Programs and Services	Our organization's board:					
	31	Uses the organization's statements about diversity, inclusion, and equity to inform the strategic planning process.	1	2	3	4	NA
	32	Includes and regularly updates a Diversity & Inclusion Action Plan with the strategic planning process.	1	2	3	4	NA
	33	Includes diversity, inclusion and equity commitments in the organization's mission, vision and values.	1	2	3	4	NA
	34	Develops short and long-term goals towards diversity, inclusion and equity and regularly assesses progress.	1	2	3	4	NA
	35	Ensures active participation in strategic planning of staff, volunteers, clients, customers, participants and donors.	1	2	3	4	NA
	36	Ensures the organization serves diverse constituents in ways that promote inclusion and equity.	1	2	3	4	NA

	Collaborations & Community Outreach	Our organization's board:					
	37	Supports public policy efforts that promote diversity, inclusion and equity.	1	2	3	4	NA
	38	Supports visible participation in events celebrating diverse communities, such as LGBTQI community events, celebrations of ethnic and cultural heritage, and events that honor civil rights leaders, etc.	1	2	3	4	NA
	Communications	Our organization's board:					
	39	Supports using pictures and stories relevant to people with diverse backgrounds in all communications.	1	2	3	4	NA
	40	Makes sure materials and websites are translated to all languages used by the populations the organization serves.	1	2	3	4	NA
	41	Ensures ED/CEO sends press releases to media outlets that target diverse populations.	1	2	3	4	NA
	Fundraising	Our organization's board:					
	42	Cultivates donors from diverse communities.	1	2	3	4	NA
<b>Performance Management</b>							
	Measurement, Evaluation and Research	Our organization's board:					
	43	Adopts appropriate diversity, inclusion and equity-related indicators in the board's performance goals.	1	2	3	4	NA
	44	Regularly assesses board commitment to the values of diversity, inclusion and equity.	1	2	3	4	NA
	45	Allows anonymous feedback to measure effectiveness of inclusive policies and programs.	1	2	3	4	NA

	46	Includes the perspectives of the organization's staff, program participants, and donors when evaluating programs.	1	2	3	4	NA
	47	Develops diversity and inclusion strategies informed by the best available data regarding diversity.	1	2	3	4	NA
	48	Regularly reviews research-based best practices regarding diversity, inclusion and equity to inform board decisions and actions.	1	2	3	4	NA
<b>Additional Activities</b>							
		Please describe additional activities your board does to advance diversity, inclusion and equity? This information will not affect your overall score, but is valuable to highlight, track and celebrate.					
<b>Scoring the Assessment</b>			Not at all	To a small extent	To a moderate extent	To a great extent	Not Applicable
		a. Total for each column					
		b. Multiply by number of points	x1	x2	x3	x4	x0
		c. Column total					
		d. Add all points in row c. for Board of Directors Score					



Scoring Guide				
	Pathfinder	Driver	Leader	Mentor
<b>Board of Directors</b>	1 to 48	49 to 96	97 to 144	145 to 192
Your Score				
<b>Chief Executive Officer Executive Director Staff</b>	1 to 48	49 to 96	97 to 144	145 to 192
Your Score				

**Path Finder**

Building an inclusive culture is hard work and takes time. As a pathfinder of diversity, inclusion, and equity, your organization is seeking organizational change. Completing this assessment is an important first step. Use this tool as a discussion starter to raise awareness and understanding. Consider developing a Diversity and Inclusion Action plan using the best practices illustrated in this assessment and address your critical areas for growth. When you have made progress, celebrate your successes.

**Driver**

Building an inclusive culture is hard work and takes time. As a driver of diversity, inclusion, and equity, your organization is driving organizational change. It has established its path towards diversity, inclusion and equity. You may use this tool as a discussion starter to raise awareness on the great work you are doing. Make a Diversity and Inclusion Action plan to address gaps and opportunities for growth. Continue to develop and implement strategies to build and sustain diversity and equity, while fostering an inclusive culture.

**Leader**

Building an inclusive culture and sustaining diverse engagement is hard work and takes time. Your organization is in the position of leading organizational change. Your organization is paving a solid path towards diversity and inclusion. Use this tool as a discussion starter to make critical decisions to address gaps and opportunities for growth. Reflect on all that your organization has accomplished to be more diverse, inclusive and equitable. Identify modifications or opportunities to rethink key management concepts and principles to enhance this work and deepen its impact.

**Mentor**

Building an inclusive culture and sustaining diverse engagement is hard work and takes time. Your organization has effectively implemented and adapted methods and processes to build and sustain diversity. It has made the creation of an inclusive environment a priority. As a mentor of diversity, inclusion, and equity, your organization is in the position of helping others implement change in their organizations. Your organization can assist others in this important work. Pathfinder and Driver organizations may benefit from following your organization's path. Your organization can benefit from mentoring others by building relationships and ensuring the sustainability of this work.

**Now what?**

Congratulations on completing and scoring the assessment! Where does your organization go from here? Here are some suggestions:

1. Host a conversation with stakeholders in your organization about the results and follow the accompanying discussion guide.
2. Incorporate the best practices listed in the assessment into the daily activities of your organization. This may include incorporating these best practices into a Diversity and Inclusion Action Plan. Please see Appendix A for the Diversity and Inclusion Action Plan Template.
3. Retake this assessment in one year and identify any changes made, or areas in need of further improvement.
4. Review the list of recommended reading in Appendix D.

## Appendix A

### Discussion Guide

#### Introduction

If you will be hosting internal discussions with stakeholders in your organization, use these questions to help guide the conversation. Questions are broken into categories to host multiple conversations or divide this work into sub-groups within your organization. For instance, you might hold a session with the board, the senior staff, all staff, just volunteers, or members of your committees.

Capture and summarize the comments that come out of these discussions and use the summaries to help guide the team within your organization that will be drafting the Diversity and Inclusion Action Plan. Feel free to share the results of the assessment with your stakeholders, allowing them to provide quality feedback about culture, interpretations and actions within your organization.

#### I. Organizational Development

Commitment to diversity, inclusion and equity should be known and understood by all board members, management, staff, volunteers, members and partners.

- Why do we think diversity, inclusion, and equity are important to our organization?
- What is our current understanding of diversity, inclusion, and equity, and their meanings? (Use the glossary if needed to spark discussion)
- How do we create a welcoming environment? (Get participants to give examples)
- What actions can we take to make our environment more inclusive? (Examples to share if your discussion stalls could be to suggest the use of pictures, signs, materials, brochures, and stories that include people with diverse backgrounds)

#### II. Internal Systems

Commitment to creating an environment free of barriers to diversity, inclusion and equity should be included in all policies, practices and guidelines of the organization.

- How do the values of diversity, inclusion and equity guide the work of our organization?
- How can we include, diversity, inclusion and equity into a values statement?
- How do we measure if our current policies relating to diversity and inclusion are effective and relevant?
- Do we consider issues relating to race, ethnicity, gender and gender identity, sexual orientation, age, class or persons with disabilities when we set policies and make decisions for the organization?

#### III. Governance

The way nonprofits approach recruiting new board members may help build diversity and promote inclusive and equitable practices.

- How do we currently recruit board members?
- Is the current composition of our board or our advisory boards reflective of the demographic served by the organization or represented in the community? How are these voices and perspectives important to our donors, volunteers and staff?
- Do we know the demographic composition of our organization (board, staff, clients, volunteers, etc) and the community that we serve? If so, in what ways are they different and why?
- What are we doing as an organization to ensure that our board and organization is reflective of the demographics and diversity of the community?

- How are we being intentional about reaching out to underrepresented populations?
- What is currently holding us back from achieving the level of diversity we desire?
- When considering the way the board and committees function, do we find and remove barriers to participation from underrepresented populations (e.g. time and location of meetings, accessibility of building, availability of child / elder care, meeting style)?
- Have we considered changing our governance structures to promote diversity, inclusion and equity? For instance, have we formed a youth advisory committee or consumer advisory committee?

#### **IV. Human Resources**

Nonprofit organizations should strive to exercise fair and equitable human resources management and practices that attract and retain qualified individuals (*Adapted from Michigan Nonprofit Association's Principles and Practices Guide*).

- How do we currently recruit and hire for diversity within our organization? Do we send job postings to a variety of contacts and through different vehicles to ensure that diverse audiences see them?
- How do we identify any barriers in the recruitment, selection and retention processes for staff, volunteers and management/leadership (i.e. advertising outlets, criteria for selection, interview process, time or financial requirements for participation)?
- How do we make sure that all employees have the same opportunities for advancement and professional development?
- How do we ensure all employees are valued and included in the workplace culture?
- If money/budgets were not a barrier to decisions made about benefits, would our organization adopt policies that were more inclusive of all employees and their families?

#### **V. Strategy**

Organizational planning is a process that defines a nonprofit's overall direction, activities and strategies to fulfill its mission. Nonprofits have a duty to engage in sound planning to provide a clear vision for the future, including overall direction, activities, programming and strategies to fulfill the mission. Partnerships with other organizations may reflect diversity. (*Adapted from Michigan Nonprofit Association's Principles and Practices Guide*).

- How do diversity, inclusion and equity relate to our organization's mission, vision and core values?
- How do we engage the participation of diverse constituents in developing the strategic direction of our organization?
- Do we have a communications strategy to inform diverse populations of our activities and invite them to participate?
- How do we partner with organizations representing diverse populations?

#### **VI. Performance Management**

Nonprofits should regularly monitor and evaluate programs and services to measure and celebrate progress against their goals.

- How do we currently evaluate and monitor the accessibility, appropriateness and effectiveness of our programs and services for diverse populations?
- How do we celebrate progress made in the areas of diversity, inclusion and equity?



## Appendix C

### Sample Statement on Diversity and Inclusion<sup>1</sup>

The mission of (*organization*) is to (*insert mission statement*). We believe that our mission is most effectively fulfilled through a commitment to inclusiveness as a core value and practice.

We maintain that building and sustaining diversity requires an ongoing commitment to inclusion that must find full expression in our organizational culture, values, norms, and behaviors. Throughout our work, we support diversity across all lines of difference, including age, economic circumstance, ethnicity, sex, race, range of ability, religion, sexual orientation, and gender identity/expression. We aim to lead by example, viewing and encouraging diversity as a fundamental and abiding strength of (*our sector in our region*).

(*This Organization*) recognizes that its effectiveness will be enhanced and its mission well served when the practice of inclusion is reflected in all aspects of the organization and specifically when:

#### **Board Membership**

Our Board of Trustees reflects the rich and growing diversity of (*insert geographic region or population of focus served by the organization*).

#### **Programming**

We create and implement programs using our awareness of cultural differences and treat all clients with respect. We seek input from staff at all levels of the organization and work with a diverse group of stakeholders to ensure that our programs are inclusive.

#### **Policies and Procedures**

Our commitment to inclusiveness is evident in our organizational policies and procedures, as part of our strategic plan, and within our organizational goals.

#### **Employment**

Our staffing at every level of the organization is reflective of (*insert geographic region or population of focus served by the organization*) diverse communities. Associated recruitment and hiring practices reflect a commitment to the value of inclusion. We foster a workplace that respects each individual, seeks and values diverse perspectives, and ensures each employee can actively contribute to fulfilling the organization's mission.

#### **Donors**

We share our commitment to inclusion as a core value and practice with current and potential donors and encourage donors to consider and embrace these values.

(*This Organization*) hopes that its demonstrated commitment to promoting diversity and inclusion represents an organizational standard for the nonprofit sector.

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<sup>1</sup> This statement relies on concepts, structure, and language from diversity statements and sample inclusiveness case statements from the Council on Foundations, the Chicago Community Trust, the Children's Museum of Atlanta, the Denver Foundation's Inclusiveness Project, and Nonprofit Enterprise at Work.

## Appendix D

### Diversity, Inclusion and Equity Recommended Reading

2014

- Adams, Maurianne; Bell, Lee Anne; and Griffin, Pat., eds. *Teaching for Diversity and Social Justice, A Sourcebook*. New York, NY: Routledge, 1997.
- BoardSource. *Diversity in Action Toolkit*. Washington DC: BoardSource, 2011.
- BoardSource. *Nonprofit Governance Index*. Washington DC: BoardSource, 2012.
- Diversity and Inclusion Initiative. *Step-by-Step: A Guide to Achieving Diversity and Inclusion in the Workplace*. Boston, MA: Third Sector New England, 2009.
- Pease, Katherine. *Inclusiveness at Work: How to Build Inclusive Nonprofit Organizations*. Denver, CO: The Denver Foundation. 2005.
- Rosenberg, Vicki; Perry Wooten, Lynn; McDonald, Mary; and Burton, Kimberly. "Building the Bridge for Diversity and Inclusion: Testing a Regional Strategy." *Foundation Review*. 2.2 (2010):100-115.
- St. Onge, Patricia. *Embracing Cultural Competency: A Roadmap for Nonprofit Capacity Builders*. St. Paul, MN: Alliance for Nonprofit Management, 2009.
- Walker, Vernetta, and Debora Davidson. *Vital Voices: Lessons Learned from Board Members of Color*. Washington DC: BoardSource, 2010.

## Appendix E - Assessment Acknowledgements

Many thanks are extended to the following organizations and individuals for promoting diversity, inclusion, and equity through their publications, reports, articles, toolkits and more, all of which provided the foundation for the best practices included in this assessment tool.

Ayeesha Lane

BoardSource

Community Tool Box

Council on Michigan Foundations

D5

Denver Foundation, *How to Build Inclusive Organizations*

Diana Kern

Diversity Initiative of Third Sector New England

Eileen Stryker

Forum of Regional Association of Grantmakers

Foundation Center

The California Endowment, *Foundation Diversity Policies and Practices Toolkit*

Gay and Lesbian Medical Association

Katena Cain

Katherine Pease

Kimberly Burton

Johnson Center for Philanthropy at Grand Valley State University

Lynn Perry Wooten

Mary McDonald

McKinsey & Company

Michigan Nonprofit Association

Nicola M. Pless and Thomas Maak, *Building an Inclusive Diversity Culture: Principles, Processes and Practice*

Out and Equal

Regina Funkhouser

Rockefeller Philanthropy Advisors

Rosemary Linares

Vicki Rosenberg



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