



Inclusiveness Assessment Tool

*A tool for assessing progress in
racial and ethnic inclusiveness
and cultural competence*



Rainbow Research Inc.



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Prepared for

**United Way of Minneapolis Area
and its member organizations**

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PART I: OVERVIEW

INTRODUCTION

This Inclusiveness Assessment Tool (Tool) can be used to help organizations make progress in becoming more racially and ethnically inclusive and more competent in dealing with diverse cultures.

The Tool is packaged in three parts:

1. This overview of the tool: its rationale and a description of five organizational practice areas critical to an organization's level of cultural competence
2. A checklist of organizational practices (including an inclusiveness planning worksheet), to be completed as part of an initial planning process
3. A progress checklist of organizational practices (including an inclusiveness progress report form) designed to measure subsequent progress in the five organizational practice areas.

Twenty-five member organizations of the United Way of the Minneapolis area, including the United Way itself, were selected to field test the Inclusiveness Assessment Tool. The Tool was revised to reflect the field test experience.

Any socially concerned organization can use this Tool to:

1. Assess its progress in becoming more inclusive
2. Plan actions to become more inclusive
3. Keep interested stakeholders informed of its progress in becoming more inclusive

The Tool was designed following an extensive study of inclusiveness practices already tested by United Way and its member organizations in the Minneapolis area. This study included (a) a series of community forums in different communities of color; (b) interviews with the inclusiveness demonstration projects; (c) interviews with organizations serving communities of color; (d) interviews with Fund Distribution Committee members; (e) interviews with members of the Council of Organization Executives; (f) ongoing collaboration with United Way's Inclusiveness Committee.

It's our hope that this Tool will be useful to organizations with a wide variety of environmental and cultural contexts, from organizations with few clients of color to organizations with many. Both face more diverse populations than they presently include and empower.

While use of this Tool cannot guarantee success in making progress toward these goals, it does provide a framework through which organizations can assess their current inclusiveness practices, identify areas that need attention, and make improvements.

The Tool can be used by an organization in a self-assessment process to identify its own level of racial and ethnic inclusiveness and cultural competence and to guide future improvements.

Cultural Context For This Tool

Organizations that are primarily run by people of European descent can be called *Eurocentric organizations*, although they may serve some people from other racial and cultural backgrounds. In these organizations, decision-making, internal operations, and program development are controlled by people of European descent. In addition, Eurocentric organizations have greater control of and access to society's resources, institutions, and money than culturally specific organizations.

We define organizations that are run by and for people of specific racial, cultural, or ethnic groups as *culturally specific organizations*. These organizations function within an organizational and cultural framework of the dominant white/European American society.

In this Tool the term *inclusiveness* is used, along with *racism* and *undoing racism*. Inclusiveness, in this Tool, does not encompass the issues of gender, disability, or sexual orientation. While they are all critical and related to some degree, undoing racism is the focus of this effort.

In this Tool, racism means prejudice plus power. Power means access to systems, institutions, and resources that are sanctioned by society. Power also means exercising control and authority within organizations and systems. The belief underlying this Tool is that most institutional power is held by people of European descent. Undoing racism means acting to share power, access, and resources with people of color.

Inclusive individuals and organizations would have the capacity to function adequately with sensitivity and understanding in different cultural settings. They would be able to understand how racism is operating personally and within organizations, and how racism affects people of color and others. They know how to deal with structural barriers including immigration, language, and other exclusionary or discriminatory laws, policies, and practices that could affect their efforts to work with others. They would be engaged in behaviors that undo racism. People of color most frequently refers to people living in the United States of African, Asian, Latino(a), and Native origins. These groups themselves are heterogenous, and each contains a range of cultural perspectives. Among Latino(a) there are racial sub-groups as well.

Communities of color refers to groupings of people of color. It also refers to those neighborhoods, institutions and places identified with, occupied by and/or controlled by people of color. Organizations that are seeking people of color as staff, volunteers, and board members are encouraged to seek people from the geographic neighborhoods where people of color live, as well as people from the broad non-residential communities of color.

In the context of this Tool, the word “multicultural” has three meanings. First, it recognizes that there are many cultures in the Minneapolis area. Second, it is a concept of cultural equity, affirming that the cultures and heritages of racially diverse groups “must be respected and incorporated into the programs and services of organizations. And third, it requires that the work environment, method of service delivery, communications, and materials of organizations reflect the diverse cultural backgrounds of the clients, staff, volunteers and board members.” (*Action Access Diversity*, United Way of Greater Toronto, 1991).

Striving for Cultural Competence

The Inclusiveness Assessment Tool is designed to be used over time. It is *not* an overall organization assessment, but rather a tool for discovering specific ways that can undo the racism that has negatively affected organizations. It is vitally important that all the questions are answered with complete candor, so that

organizations can realistically plan and implement changes that will help them achieve their missions more effectively -- especially with people of color.

Different organizations have already achieved varying levels of competence in serving people of color. The important task at the beginning is to assess the organization's level of achievement as accurately as possible. "Accurate" answers are those that closely reflect the actual culture and environment of the organization at the *current* time. First-time Tool use yields current data, against which one can later measure progress. The objective in using the Inclusiveness Assessment Tool over time is to make and sustain as many changes as possible that move the organization toward inclusiveness and cultural competence.

The "Yes/No" response format is intended to give cues to organization management. These are not *absolute* indicators. An organization with many "Yes" responses needs to explore these areas more deeply for additional opportunities to eliminate barriers. "No" responses may indicate need for attention more quickly. Organizations can use the Tool to set realistic and measurable goals, once they gauge their *current* level of cultural competence.

Completing the checklist should be a shared responsibility within the organization and not just the task of one individual, not even the director or president, in the organization. Ultimately, the director and board chair are responsible for the answers on the completed Tool checklist, but other key people in the organization should be involved in the process. The Inclusiveness Planning Worksheet allows each organization to set priorities in each practice area and assign individual responsibilities with target dates for completion.

Progress in some organizational practice areas may be more easily achieved than others. For example, it may be easier for some organizations to increase the racial and cultural diversity on their boards of directors than their staffs. The Tool is designed to measure progress in both areas. Progress toward greater board diversity may be reflected in the policies enacted by the board to recruit people of color and different cultures to board membership. Progress would be shown, in fact, by increasing the number of people of color and different cultures on the board. Opportunities to diversify board composition occur annually in most organizations; staffing opportunities may be less frequent. The Tool recognizes the differences in opportunities. The Organizational Practices checklist on Human Resources poses a number of questions that may help develop strategies for increasing the inclusiveness of an organization's staff.

In Part III the response format has been changed from “yes/no” to a scale of 1-5. This is done to reflect the progress organizations have made from their beginning levels of inclusiveness.

Making progress counts, but the critical question for a subsequent review period is, “What more can this organization do to improve its inclusiveness?”

ORGANIZATIONAL PRACTICE AREAS

New organizational practices will allow organizations to become more inclusive. It is through these practices that organizations must earn credibility and gain legitimacy in communities of color.

The following five practice areas ultimately affect an organization's level of inclusiveness:

#1 Governance

#2 Program

#3 Human Resources

#4 Community Partnerships

#5 Business and Administration

Organizational Practice Area #1: Governance

Most organizations operate with a board of directors, and with some form of committee structure designed to help the organization achieve its mission. All of these organizations have by-laws that speak to the purpose of the organization, its operations, and board composition. Any inclusiveness strategy must include the board; moreover, it should even begin there.

Board Membership

Most boards have a selection process for determining membership. The leadership on the board strives to ensure representation from certain segments of the community -- typically the ones thought to be helpful in securing financial resources, prestige, image and clout needed by the organization. In the culturally competent organization, the board is attentive to recruiting diverse board members because this, too, will help the organization secure the financial resources, prestige, image, and clout it needs.

Inclusiveness on the board can help ensure that the organization is accountable and responsive to people of color that the organization serves. It also helps ensure better decisions by including more points of view in the decision-making process.

While a board's intentions are reflected in its mission statement and policies, it is the *actions* that really count. The inclusive organization has specific strategies for assuring that the board's membership and, ultimately, its leadership, reflect the issues and concerns of the racially and culturally diverse people in the community and/or the organization's service area or target population.

Board Training and Leadership Development

An inclusive organization does more than place people of color on its board. It places on its board both people of color and European Americans who are accountable to, and connected with, the communities they are to serve. In addition, board members of color are full participants in board deliberations and board leadership. Achieving this requires that people of color be encouraged to participate, and that people of European descent welcome and encourage them as contributing members of the board.

Board orientation can help welcome new board members, and subsequent training of all board members should help them address issues of racism, and racial and cultural diversity. Such training should encourage board members to practice the principles of inclusiveness when considering any organizational policy. The orientation and training should permit all board members to claim their racial and cultural identity, and allow that identity to become an asset to the entire organization. Veteran board members should assist newcomers in gaining a sense of ownership in the organization. In addition, newcomers will feel more ownership as the organization itself changes to meet the needs of those who had previously been excluded.

A word about mentoring: Establishing a mentor relationship between new and veteran board members is often a good idea. However, mentoring is a two-way street. While mentoring by seasoned board members can help newcomers of diverse racial and cultural backgrounds prepare for and assume leadership positions on the board, newcomers can also educate existing board members about programs, policies, and practices that may or may not work well in a new multicultural environment. This two-way mentoring can, in essence, create new ways of operating in the organization.

Organizational Practice Area #2: Programming

Organizations actualize their missions, goals, and objectives through their programs. By “program” we mean all the things an organization does to serve its constituency, in accordance with its mission. It is probably unrealistic to believe that an organization can become more inclusive and culturally competent without considering issues of culture and racism in the design and conduct of its program. For example, most nonprofit organizations conduct fund raising. Certainly an organization’s own inclusiveness and cultural competence will be reflected in the way it operates its fund raising program.

An organization's program must reflect an understanding of racial and cultural differences, as well as an understanding of the way that racism has affected people of color in the service area, and the way that racism has affected others in program design and implementation. These understandings, and the corrections they imply, must be incorporated into the design and conduct of organization programs.

Program Planning, Development, and Evaluation

Program planning requires at least two levels of attention. The first level involves learning about the communities the program intends to serve: their skills, strengths, and capabilities, as well as their needs. A culturally competent program builds on the skills, strengths, and capabilities of the communities to be served. An organization also needs to look at the impact that racism has had on people of color in the service area. The organization should review and adapt existing programs, and may need to design new programs, to address conditions or meet needs that have resulted from racism.

The second level of attention involves looking critically at the organization's own skills, strengths, and capabilities to discover how it can best support the communities in question. The organization should look at ways it can change to best serve these communities. The culturally competent organization involves diverse communities early on in both these planning activities. Programs growing out of such planning activities stand a much better chance of succeeding than those that exclude rather than include the people most directly affected. Diverse communities should also be included in the design of program evaluation activities, and evaluation should address issues created by serving several communities.

An organization with only a few people of color in its community or program service area may choose to use such program planning activities as a way to teach itself and its constituents about different racial and cultural groups. In such instances, staff development and training could focus on issues of racism and diversity. The organization also could develop collaborative and partnership relationships with culturally specific individuals, organizations and communities.

Such partnerships could provide opportunities for Eurocentric organizations and culturally specific organizations to inventory their resources and expertise, and share them in mutually beneficial ways. In addition, a primarily Eurocentric organization may need to do more investigating about the people of color who *are* in its service area.

Program Implementation

Eurocentric organizations seeking to reach people of different races and cultures must find ways to bridge the racial and cultural gaps between their organizations and the communities they wish to serve.

Organizations seriously interested in serving people of different cultures should have staff from those different cultures, and incorporate their perspectives in designing and implementing such programs. In any case, all staff should be knowledgeable and sensitive to other cultures and be alert to opportunities for creating collaborative or partnership relationships with culturally specific individuals and organizations. In addition, organizations should seek training in multicultural program planning, development, and implementation.

Organizational Practice Area #3: Human Resources

It is through the proper nurturing and development of their human resources that organizations are ultimately able to fulfill their missions. In many nonprofit organizations, paid staff and volunteers are critical human resources.

Paid staff

Staff is key to any organization's ability to offer its program to a community. Individual staff members are selected from a pool of current and potential applicants to help an organization fulfill its mission. For an organization to become inclusive in order to serve a more diverse community, diversity must be reflected in the composition of the staff. This begins by broadening the pool of applicants.

An inclusive organization does more than merely add one or two persons of color to its staff. Diversity should be reflected at all levels of staffing. People of different races and cultures must have equal access to all staff positions in an organization. This may require an organization to expand its ideas about the ways in which people become qualified to undertake work with people or communities of color. Job descriptions themselves should change as programs and services change to meet the needs of previously excluded people.

Boards of organizations should make any board or staff officer aware of their commitment to inclusiveness prior to hiring a person for such a position. Few, if any, of an organization's objectives can be achieved without the support of its president and/or executive director. These people communicate to staff and others in the organization how such matters are to be valued.

Introducing staff of diverse racial and cultural backgrounds into a majority culture organization requires special preparation of the existing staff. These newcomers cannot be viewed as “interlopers” or “intruders” being brought in to satisfy a superficial or “window dressing” commitment to inclusiveness. The organization has to commit to the *spirit* of inclusiveness, and that commitment must be communicated throughout the organization. People from different races and cultures bring a new perspective to an organization based upon their different experience.

Organizations that are making progress in becoming more inclusive and culturally diverse have found ways to change the organization's culture and environment. Staff

leadership is needed to ensure that new perspectives and experience are incorporated in the operations of the organization.

Volunteers

Volunteers who serve on organizations' governing boards and committees are covered in this Tool under the Governance practice area.

Using volunteers to assist with programming or administration is essential to the functioning of many socially concerned organizations. The volunteer's role may range from direct service provider to fund raiser to public relations volunteer. Due to the depth and breadth of volunteer involvement in many nonprofit organizations, it is just as important to have volunteers from different races and cultures as it is to have such representation among the board (which is also made up of volunteers) and paid staff.

Equal attention should be paid to volunteer recruitment as to that of the staff and board. Effective volunteer recruitment requires knowledge and understanding of various racial and/or culture groups and how they view volunteerism. Having this kind of knowledge would assist an organization in knowing where to look for volunteers in different communities of color, and how to talk about volunteer opportunities.

An effective organization finds creative ways to recognize and reward people for volunteering, which, in turn, helps with volunteer recruitment. Volunteer recognition ceremonies and other benefits should reflect the organization's commitment to inclusiveness. For example, an organization with few volunteers of color could sponsor a special event honoring its volunteers, in which they bring in persons not typically involved in the organization, but who have a lot to offer to the organization and its volunteers. Selecting participants for the special event could be an opportunity to practice inclusiveness.

Many Eurocentric organizations are unknown in communities of color. These communities often may not know how they can benefit from the services and programs offered by these organizations and how those benefits can be enhanced by their participation as volunteers. Eurocentric organizations will need to develop networks in communities of color to share information. These networks would also provide the means to learn about the needs and desires of people of color in the service area, so that primarily white organizations can make appropriate changes that result in their becoming meaningful, relevant, welcoming places for people of color to volunteer. The networks should also be sources to recruit potential volunteers.

The culturally competent organization will improve upon the traditional ways volunteers are used. Changing the time and place of certain organizational activities and board meetings could assist in recruiting a more diverse group of volunteers.

Organizational Practice Area #4: Community Partnership

Community approval is the most meaningful sanction that organizations can have. The State of Minnesota can provide legal sanction to an organization, but the most meaningful sanction comes from the people intended to benefit from the organization's programs and services. After all, it is they who participate in the organization's programs and provide financial and other resources to support the work of the organization. Similarly, popular sanction is withdrawn when the people cease supporting an organization, participating in its programs, or using its facilities.

Partnerships

The support of affected diverse communities will be required to achieve and sustain racial and cultural diversity in the organization. That support can be achieved through collaborations and partnerships with those communities. An organization's ability to connect with and engage individuals and organizations from different racial and cultural populations is a measure of the depth and quality of that organization's relationship with those communities. It defines the level of trust between that organization and communities of color.

Community partnerships focus on mutual benefit and service for those people least served. They are characterized by enlarging an organization's decision-making areas through inviting others to make decisions. Partnering means loosening control of an organization's sovereignty, and is different from outreach. Outreach means program participants have the opportunity for input but the organization's established management and board retain control.

Eurocentric organizations wishing to serve culturally specific populations may be able to do so only in collaboration or partnership with culturally specific organizations, by carefully negotiating roles to be played by each.

Communications

To gain popular support from different communities, an organization may need to adopt different styles of communication that depend a great deal upon the racial or cultural groups involved. Organizations should be aware of, and use, the different vehicles for communication (newspapers, newsletters, radio, posters, handbills, cable TV, etc.) appropriate for different communities, using the appropriate languages.

The use of informal networks, and personal communication with key leaders and individuals, are additional essential methods of communication. It's important to recognize that communication travels two ways and to develop a reciprocal exchange of information and viewpoints between Eurocentric and culturally specific organizations.

Organizational Practice Area #5: Business and Administration

Inclusiveness is expected to affect all aspects of the organization's operations, including its business and administrative practices. It also extends to the organization's facilities and how well they look and whether they feel open and accessible to different communities, including communities of color.

Purchasing and Contracting

Organizations should review their purchasing and contracting arrangements to ensure that they reflect practices of inclusiveness. Inclusive organizations extend their purchasing power to buy goods and services from diverse communities, and do business with others committed to the same principles of inclusiveness. These arrangements should encompass the full range of goods and services an organization purchases from where it buys its supplies to where it rents facilities, whether for programs or administration.

Facilities

Facilities are the visual representation of an organization's values and culture. They communicate to anyone who walks through the doors whether or not the space is welcoming and accepting or alien and intimidating. A facility's furnishings and decor, often created without consideration for different cultures, serve as a facilitator or barrier to trust. If different communities are unaware of an organization's facilities, especially a nearby organization's facilities, it suggests they have not yet been made to feel welcome, or that welcoming gestures are not yet sufficient.

The extent to which facilities are welcoming can set the stage for the experiences of clients/customers, constituents, and the community, with the organization. Indeed, the first staff member a visitor encounters after stepping through the front door should be able to deal with diversity.

PART II: FIRST TIME TOOL USE

INCLUSIVENESS ASSESSMENT TOOL

General Instructions

An organization must take stock of the inclusiveness of its current practices before it can develop plans and set goals to become more racially and culturally inclusive. This will provide information from which future progress can be planned and monitored. This inclusiveness checklist will help you conduct that preliminary assessment. *Remember it is an assessment of current status and not intended to pass judgment on an organization's past performance.* The data collected should be used by the organization for planning purposes.

Answer all Checklist questions either "Yes" or "No." For example, the response to #2-1, "Programs and services are free of barriers that limit access to people of color," would be "Yes" only if there are no identifiable barriers that limit access. If, **currently**, there are some barriers that answer would be "No." Use the "Comments affecting answer" to add any specific information on current status. Pay careful attention to checklist "No" responses in developing plans and objectives for the next reporting period.

We encourage organizations to briefly offer evidence in the "Evidence supporting answer" section to support their scores. The Tool is to be used over time. First time use yields entry data, which can be used subsequently to measure progress. The objective of using the Tool is to continually progress over time.

The "Yes/No" response format is intended to give cues to organizational stakeholders. These are not **absolute** indicators. An organization with many "Yes" responses needs to explore these areas more deeply for additional opportunities to eliminate barriers. "No" responses may indicate the need for attention more quickly.

Organizations **can** use the Tool to set realistic and measurable goals, once they gauge their present level of cultural competency.

Because the current status of an organization changes over time, it is recommended that at regular intervals over at least three years, the Tool be used to collect new data about inclusiveness and cultural competence.

Completing the Tool checklists should be viewed as an overall organizational responsibility and not just the task of one individual in the organization – not even the director or board chair. Ultimately, the director or board chair may be responsible for completing the Tool checklist, but other key people in the organization should be involved in the process.

To complete the checklist:

- Answer all questions by checking the “Yes” or “No” box as it best reflects the current situation at your organization. Some questions may be more relevant to some organizations than others.
- Use the “Evidence support answer” sections to offer examples of current status and explanations. For example, if the response to #1-1, “There is a clearly articulated strategy for recruiting board members of racial and cultural diversity” is “No,” but steps are already under way to improve the situation (for instance, “the board has appointed a committee or directed the executive director to develop a plan and report back by a certain date”). Comments to that effect would be appropriate. **All “No” responses require some comment.**
- Use the “Objectives” section at the end of each practice area to list specific goals for improving your level of inclusiveness in that practice area before your next assessment. Objectives should be specific and related to what an organization wants to achieve during a specified period of time. For example, under #3-2, “All organizational position descriptions value experience, competence and sensitivity in the working with people of different races and cultures,” an objective might be to review and rewrite all position descriptions where indicated to reflect the organization’s commitment to inclusiveness.

Governance Practices

Instructions

The questions in this practice area are designed to establish your organization's **current** level of inclusiveness in its governance structure. All policies, practices and structures that are instrumental to fulfilling your organization's mission fall within the purview of governance practice (see Organizational Practice Areas for further detail). Remember that this data simply establishes where your organization is, and not where you want it to be, or are committed to being.

To complete the checklist:

- Answer all questions by checking the “Yes” or “No” box as it best reflects the **current** situation at your organization. Some questions may be more relevant to some organizations than others.
- Use “Evidence supporting answer” section to give specific examples of your organization's current status. For example, your organization may be planning to develop and implement a policy for board racial and cultural diversity training, but the policy is not in place. Your answer, then, to #1-4 would be “No” with a brief notation under comments.
- Use the “Objectives” section to list specific goals that your organization would like to achieve by the end of its next assessment period. For example, under #1-7, your organization may believe that it needs to increase the representation of people of different races and cultures on its board of directors. Your organization would list a goal addressing that issue.

#1 Governance Practices

#1-1 There is a clearly articulated strategy for recruiting board members of racial and cultural diversity.

Yes No

Comments:

#1-2 The recruiting strategy is used whenever board openings occur.

Yes No

Comments:

#1-3 New board members are provided with the support and information needed to become effective board members.

Yes No

Comments:

#1-4 All board members are provided racial and cultural diversity training.

Yes No

Comments:

#1-5 Board members are recognized and tapped for their cultural experience, and this knowledge is valued and incorporated into the organization's governance.

Yes No

Comments:

#1-6 An exit interview is conducted with each retiring or resigning board member to learn about practices that may be more successful in retaining people of color.

Yes No

Comments:

TOTAL YES REPOSSES _____

OBJECTIVES FOR REPORTING PERIOD:

Program Practices

Instructions

The questions in this practice area are designed to establish your organization's **current** level of inclusiveness in its program practices. Program refers to whatever your organization does to serve its constituency (see Organizational Practice Areas for further detail). Remember that this data simply establishes where your organization is, and not where you want it to be, or are committed to being.

To complete the checklist:

- Answer all questions by checking the “Yes” or “No” box as it best reflects the **current** situation at your organization. Some questions may be more relevant to some organizations than others.
- Use “Evidence supporting answer” section to give specific examples of your organization's current status. For example, your organization may be reviewing its programs and services to identify and eliminate barriers that may limit access to people of color, but the process has not been completed. The response to #2-1 would be “No” with a brief notation under comments about the work in progress.
- Use the “Objectives” section to list specific goals that your organization would like to achieve by the end of its next assessment period. For example, under #2-7, your organization may believe that it needs to establish an inclusiveness process for soliciting feedback from program participants.

#2 Program Practices

#2-1 Programs are free of barriers that limit access to or by people of color.

Yes No

Comments:

#2-2 People of color and different cultures participate in program planning, and program design reflects their input.

Yes No

Comments:

#2-3 Program participants reflect the racial and cultural characteristics of the community or program service area.

Yes No

Comments:

#2-4 Culturally specific programs and services are available and accessible through the organization to communities of color.

Yes No

Comments:

#2-5 Resources are allocated to support culturally specific program initiatives.

Yes No

Comments:

#2-6 The program's design and operations are acknowledged by the community representatives to reflect the organization's knowledge and sensitivity to community and culture issues.

Yes No

Comments:

#2-7 The organization's strategy for program evaluation includes getting feedback from program participants.

Yes

No

Comments:

#2-8 The agency has established credibility in the communities it serves.

Yes

No

Comments:

TOTAL YES RESPONSES _____

OBJECTIVES FOR REPORTING PERIOD:

Human Resources Development Practices

Instructions

The questions in this practice area are designed to measure your organization's **current** level of inclusiveness in its human resources practices. Human Resources development practices refer to the utilization of paid staff and volunteers to carry out your organization's mission and implement its programs (see Organizational Practice Areas for further detail). Remember that this data simply establishes where your organization is, and not where you want it to be, or are committed to being.

To complete the checklist:

- Answer all questions by checking the “Yes” or “No” box as it best reflects the **current** situation at your organization. Some questions may be more relevant to some organizations than others.
- Use “Evidence supporting answer” section to give specific examples of your organization's current status. For example, your organization may have completed a review of all its position descriptions and revised to require qualifications essential to the job, but no selections have been made since the revisions. Your answers, then, to #3-1 and #3-2 could be “Yes” with a brief notation under comments that would explain the current status.
- Use the “Objectives” section to list specific goals your organization would like to achieve by the end of its next assessment period. For example, objectives related to #3-1 and #3-2 could be to test and evaluate the effectiveness or utility in hiring people of different racial and cultural groups.

#3 Human Resource Development Practices

STAFF

#3-1 Selection procedures insure that only necessary job requirements are needed for performing the job.

Yes No

Comments:

#3-2 All position descriptions have been written to value competence and sensitivity in working with people of different races and cultures as an important job-related qualification.

Yes No

Comments:

#3-3 Candidates and volunteers of color are actively recruited for all position openings.

Yes No

Comments:

#3-4 The organization taps into individual and organizational networks of people of color.

Yes No

Comments:

#3-5 Board search committees have been effective in locating and hiring qualified candidates of color to fill top positions in the organization.

Yes No

Comments:

#3-6 People of color occupy positions at every level of the organization.

Yes No

Comments:

#3-7 Staff development/training and mentor opportunities are made available to staff at all levels of the organization.

Yes No

Comments:

#3-8 Staff of color have received promotions or been assigned positions of leadership and higher responsibilities within the organization.

Yes No

Comments:

#3-9 Job evaluations includes assessment of inclusiveness and cultural competency skills, as well as efforts to develop these skills.

Yes No

Comments:

#3-10 The organization has been successful in retaining or replacing staff of color and different cultures.

Yes No

Comments:

#3-11 There are no quotas limiting the number of people of color in the organization.

Yes No

Comments:

#3-12 The staff has sufficient knowledge and capabilities to serve all clients and constituents in the agency's service area.

Yes No

Comments:

#3-13 Organization training and staff development regularly with deal issues of cultural diversity and anti-racism.

1 2 3 4 5

Evidence supporting answer:

#3-14 Staff members who are active in advancing diversity, inclusiveness, cultural competence and anti-racism are recognized, supported and acknowledged.

Yes No

Comments:

#3-15 Management and staff actively participate in networking opportunities with culturally specific organizations and professional associations.

Yes No

Comments:

#3-16 Staff is skilled in providing culturally appropriate referrals to clients the organization cannot serve.

Yes No

Comments:

VOLUNTEERS

#3-17 Volunteers reflect the racial, cultural and ethnic backgrounds of the community(ies) they serve.

Yes No

Comments:

#3-18 Volunteer recruitment strategies have been developed to target communities of color.

Yes No

Comments:

#3-19 Volunteer training regularly addresses issues of race and culture and their implications for the organization and its programs.

Yes No

Comments:

#3-20 Times and places of meetings and programs are flexible and accommodating to volunteers' schedules.

Yes No

Comments:

#3-21 Networks in communities of color have been developed that can be used to access potential volunteers.

Yes No

Comments:

#3-22 The organization has been successful in retaining or replacing volunteers of color and different cultures.

Yes No

Comments:

TOTAL YES REPONSES _____

OBJECTIVES FOR REPORTING PERIOD:

Community Partnership Practices

Instructions

The questions in this practice area are designed to measure your organization's **current** level of inclusiveness in its community partnership practices. Community partnerships refer to the development of collaborations and partnerships with diverse communities in your organization's program area (see Organizational Practice Areas for further detail). Remember that this data simply establishes where your organization is, and not where you want it to be, or are committed to being.

To complete the checklist:

- Answer all questions by checking the “Yes” or “No” box as it best reflects the **current** situation at your organization. Some questions may be more relevant to some organizations than others.
- Use “Evidence supporting answer” section to give specific examples of your organization's current status. For example, your organization set an objective to establish an advisory committee(s) with representation from different racial and cultural groups in the community, but the committees are not yet operational. Check the box that best represents the progress your organization made, giving evidence to support your answer.
- Use the “Objectives” section to list specific goals that your organization would like to achieve by the end of its next assessment period. For example, an objective related to #4-3 could be to use broadcast and print media serving communities of color to inform them about your organization's programs, employment and volunteer opportunities.

#4 Community Partnership Practices

#4-1 The organization has sustained contact with individuals and organizations in communities of color.

Yes No

Comments:

#4-2 The organization prepares and disseminates culturally specific program information in languages appropriate to the cultural group.

Yes No

Comments:

#4-3 The organization uses various culturally specific communications organs in the community to provide information about organization programming that affects the community.

Yes No

Comments:

#4-4 The organization uses its resources to support activities in the community relevant to different racial and cultural groups.

Yes No

Comments:

#4-5 The organization makes its facilities available to different racial and cultural groups.

Yes No

Comments:

#4-6 The organization uses an advisory committee which includes people of different races and cultures.

Yes No

Comments:

#4-7 The organization supports and participates in neighborhood associations and culturally specific organizations.

Yes

No

Comments:

TOTAL YES RESPONSES _____

OBJECTIVES FOR REPORTING PERIOD:

Business and Administration Practices

Instructions

The questions in this practice area are designed to measure your organization's **current** level of inclusiveness in its business and administration practices. Business and administration practices refer to the accessibility of your organization facilities, business contracts, and other contracting arrangements to communities of color (See Organizational Practice Areas for further detail). Remember that this data simply establishes where your organization is, and not where you want it to be, or are committed to being

To complete the checklist:

- Answer all questions by checking the “Yes” or “No” box as it best reflects the **current** situation at your organization. Some questions may be more relevant to some organizations than others.
- Use “Evidence supporting answer” section to give specific examples of your organization's current status. For example, your organization sets an objective to compile and begin using a list of vendors and contractors of people of different races and cultures. Compilation of the list may have been completed but no purchases or contracts have been made from vendors on the list. Check the box that best reflects your organization's progress toward its objective. Offer evidence to support your answer.
- Use the “Objectives” section to list specific goals that your organization would like to achieve by the end of its next assessment period. For example, an objective related to #5-4 could be to use vendors from the list during the year.

#5 Business And Administration Practices

#5-1 The organization's vendors and contractors represent different racial and cultural populations.

Yes No

Comments:

#5-2 The organization maintains an up to date list of vendors and contractors of people of different races and cultures.

Yes No

Comments:

#5-3 The organization's bank has a clear track record of providing services to communities of color on a non-discriminatory basis.

Yes No

Comments:

#5-4 The organization uses culturally specific media when advertising or soliciting business.

Yes No

Comments:

#5-5 The location of facilities, programs and services are accessible by public transportation.

Yes No

Comments:

#5-6 The organization has facilities located in communities of color.

Yes No

Comments:

#5-7 The interior decor of organization's facilities reflects the organization's presence in a multicultural environment.

Yes No

Comments:

#5-8 Facilities are staffed by culturally competent people.

Yes No

Comments:

TOTAL YES RESPONSES _____

OBJECTIVES FOR REPORTING PERIOD:

PART III: PROGRESS CHECKLIST

ASSESSMENT OF ORGANIZATIONAL PRACTICES

General Instructions

An organization must continue to work to sustain its inclusiveness progress. This checklist is designed to be used at the end of an organization's first reporting period and subsequently to measure progress in becoming a more racially and culturally inclusive organization. The questions in this checklist are identical to those in the checklist used to collect initial self-assessment data. The responses, however, are on a scale of 1-5. Here the intent is to measure **progress** whereas the initial checklist was to establish a **current** level of inclusiveness from which progress could be measured.

This Tool will enable an organization to track its progress on a periodic basis. Each time the Tool is used, it will yield progress results in each practice area. It can be used in the same way as the initial checklist was used to develop an organization's inclusiveness plan. The continuum method of scoring allows an organization to show progress toward achieving an ultimate objective.

In scoring remember:

- A one means that there has been no progress or even regression.
- A two means that progress has been minimal. For example, if an organization had no people of different races and cultures on its staff or board of directors, and set a goal of achieving 15% membership for both board and staff, and achieved only 1% out of 30% opportunities, that's minimal progress. However, if there were circumstances that could explain such a performance, evidence should be offered to explain the lack of progress.

- A three means moderate progress. For example, in the same situation mentioned above, achieving 5-7% board and staff membership could be considered moderate progress.
- A four represents substantial progress. Using the same example as above, an achievement above 8% increase in membership would probably be considered substantial progress.
- A five means the organization fully achieved the objective. With the above example, it would mean the organization achieved a 15% increase or higher in membership for both board and staff.

In completing the checklist:

- Answer all questions by checking one of the five boxes in all five practice areas as it reflects the progress made in those areas since the last reporting period.
- Use the “Evidence supporting answer” section to offer explanations or examples of change in status. For example, under #1-2: “The recruiting strategy is used whenever board openings occur,” an organization may have put forth considerable effort, but there has been no significant change in the board's composition. What is being measured is performance in relation to a particular strategy. If that strategy has not yielded results, the proper response to #1-7 would be to check box 1 or 2. The organization may choose to offer evidence to support or explain its choice of an answer.
- Compare results from this checklist with your “initial assessment” data to measure periodic progress. Also, comparison can be made within and across practice areas to learn how progress with one issue or practice area may affect that in another. For example, how has progress in #1-6: “Retiring or resigning board members are tapped as resources to learn about practices that may be more successful in retaining people of color” affected progress in #1-5: “The cultural experiences of board members are recognized, tapped and incorporated into the organization's governance.” The expectation is that organizations may learn something from members leaving the board that can help them learn how to use board members of color more effectively. Also, compare progress in #3-6: “People of color occupy positions at every level of the organization” with #4-1: “The organization has meaningful contact with individuals and organizations in communities of color.” An expectation here is that organizations with people of color at every level in

their organizations may improve that organization's credibility in communities of color.

- Enter the organization's practice area objectives for the next reporting period under the objectives section.
- Remember, the purpose is to achieve and sustain progress over time. Results from each practice area can be used to set achievable objectives for that practice area for the next reporting period.

Although no attempt was made to weight each practice area, we do recognize that progress may be more easily achievable in some areas than others. For example, progress may come more easily for organizations in the practice areas of Governance and Business Administration than in Human Resources Development and Program. Consequently, this may be reflected in setting objectives and allocating resources. To truly be inclusive, an organization must strive to achieve and sustain progress in all five practices areas.

Governance Practices

Instructions

The questions in this practice area are designed to measure your organization's progress toward achieving its inclusiveness objectives since the last reporting period. All policies, practices and structures that are instrumental to fulfilling your organization's mission fall within the purview of governance practice (see Organizational Practice Areas for further detail).

To complete the checklist:

- Answer all questions by checking the appropriate box (1-5) as it best reflects the **current** situation at your organization. Some questions may be more relevant to some organizations than others.
- Use “Evidence supporting answer” section to give specific examples of your organization's current status. For example, your organization may have set an objective to implement a policy for board racial and cultural diversity training, but the policy is not fully in place. Your answer, then, to #1-4 would depend upon how much progress was made toward implementation. Box 5 would be checked only if the policy was fully implemented at the end of the reporting period.
- Use the “Objectives” section to list specific goals that your organization would like to achieve by the end of its next assessment period. For example, under #1-7, your organization may believe that it needs to increase the representation of people of different races and cultures on its board of directors. Your organization would list a goal addressing that issue.

#1 Governance Practices Checklist

#1-1 There is a clearly articulated strategy for recruiting board members of racially and culturally diverse backgrounds.

1 2 3 4 5

Evidence supporting answer:

#1-2 The recruiting strategy is used whenever board openings occur.

1 2 3 4 5

Evidence supporting answer:

#1-3 New board members are provided with the support and information needed to become effective board members.

1 2 3 4 5

Evidence supporting answer:

#1-4 All board members are provided with racial and cultural diversity training.

1 2 3 4 5

Evidence supporting answer:

#1-5 The cultural experiences of board members are recognized, and incorporated into the organization's governance.

1 2 3 4 5

Evidence supporting answer:

#1-6 Retiring board members continue to be utilized as resources to learn about practices that may be successful in recruitment and retention of people of color.

1 2 3 4 5

Evidence supporting answer:

#1-7 The organization has adequate representation of people from different races and cultures on its board of directors.

1 2 3 4 5

Evidence supporting answer:

#1-8 The board regularly discusses how its policy decisions may affect the organization's progress towards inclusiveness and cultural competence.

1 2 3 4 5

Evidence supporting answer:

OBJECTIVES FOR REPORTING PERIOD:

Program Practices

Instructions

The questions in this practice area are designed to measure your organization's progress toward achieving its inclusiveness objectives since the last reporting period. Program refers to whatever your organization does to serve its constituency (see Organizational Practice Areas for further detail).

To complete the checklist:

- Answer all questions by checking the appropriate box (1-5) as it best reflects the **current** situation at your organization. Some questions may be more relevant to some organizations than others.
- Use “Evidence supporting answer” section to give specific examples of your organization's current status. For example, your organization may have set an objective, over a three-year period, to review all of its programs and services to identify and eliminate barriers that may limit access to people of color. Year one objectives may have been to identify the barriers and plan a strategy for elimination. The actual elimination of the barriers would come in years two and three. The response to #2-1 would be to mark the box that would best represent the progress made on identifying the barriers and planning a strategy for barrier elimination and provide supporting evidence.
- Use the “Objectives” section to list specific goals that your organization would like to achieve by the end of its next assessment period. For example, under #2-7, your organization may believe that it needs to establish an inclusiveness process for soliciting feedback from program participants.

#2 Program Practices Checklist

#2-1 Programs are free of barriers that limit access to or by people of color.

1 2 3 4 5

Evidence supporting answer:

#2-2 Program planning and design reflect the input of people of color.

1 2 3 4 5

Evidence supporting answer:

#2-3 Program participants reflect the racial and cultural characteristics of the community or program service area.

1 2 3 4 5

Evidence supporting answer:

#2-4 The organization's culturally specific programs and services are available and accessible to communities of color.

1 2 3 4 5

Evidence supporting answer:

#2-5 Resources are allocated to support culturally specific program initiatives.

1 2 3 4 5

Evidence supporting answer:

#2-6 The program's design and operations reflect the organization's knowledge and sensitivity to the culture issues.

1 2 3 4 5

Evidence supporting answer:

#2-7 The organization's strategy for program evaluation includes getting feedback from all program participants.

1 2 3 4 5

Evidence supporting answer:

#2-8 The cultural community members perceive that the organization supports issues of interest to communities of color.

1 2 3 4 5

Evidence supporting answer:

OBJECTIVES FOR REPORTING PERIOD:

Human Resources Development Practices

Instructions

The questions in this practice area are designed to measure your organization's progress toward achieving its inclusiveness objectives since the last reporting period. Human Resources development practices refer to the utilization of paid staff and volunteers to carry out your organization's mission and implement its programs. Program refers to whatever your organization does to serve its constituency (see Organizational Practice Areas for further detail).

To complete the checklist:

- Answer all questions by checking the appropriate box (1-5) as it best reflects the **current** situation at your organization. Some questions may be more relevant to some organizations than others.
- Use “Evidence supporting answer” section to give specific examples of your organization's current status. For example, your organization may have completed its objective to review all of its position descriptions and revised them to require qualifications essential to the job, but no opportunities for selections have occurred since the revisions. You may choose to check box 5 with evidence indicating that the impact of the revisions remain to be tested.
- Use the “Objectives” section to list specific goals your organization would like to achieve by the end of its next assessment period. For example, objectives related to #3-1 and #3-2 could be used to test and evaluate the effectiveness or utility of the revised position description in hiring people of different racial and cultural groups.

#3 Human Resource Development Practices Checklist

STAFF

#3-1 Selection procedures ensure that only necessary job requirements for performing the job (e.g., require academic degrees or other certification that are essential for job performance) are required.

1 2 3 4 5

Evidence supporting answer:

#3-2 All position descriptions value experience, competence and sensitivity in working with people of different races and cultures.

1 2 3 4 5

Evidence supporting answer:

#3-3 The organization utilizes individual and organizational networks of people of color.

1 2 3 4 5

Evidence supporting answer:

#3-4 Candidates of color are actively recruited for all position openings.

1 2 3 4 5

Evidence supporting answer:

#3-5 Organization search committees have been effective in locating and hiring qualified candidates of color to fill administrative and managerial positions in the organization.

1 2 3 4 5

Evidence supporting answer:

#3-6 People of color occupy positions at every level of the organization.

1 2 3 4 5

Evidence supporting answer:

#3-7 Staff development and training opportunities are made available to staff at all levels of the organization.

1 2 3 4 5

Evidence supporting answer:

#3-8 All newly hired staff are matched with mentors in the organization.

1 2 3 4 5

Evidence supporting answer:

#3-9 Staff of color have received promotions or been assigned positions of leadership and higher responsibilities within the organization.

1 2 3 4 5

Evidence supporting answer:

#3-10 Job performance reviews include assessments of inclusiveness and cultural competence skills, as well as efforts to develop these skills.

1 2 3 4 5

Evidence supporting answer:

#3-11 The organization has been successful in retaining or replacing staff of color.

1 2 3 4 5

Evidence supporting answer:

#3-12 Hiring goals do not restrict or limit the number of people of color in the organization.

1 2 3 4 5

Evidence supporting answer:

#3-13 The organization staff has sufficient knowledge and capabilities to serve all clients and constituents in the organization's service area.

1 2 3 4 5

Evidence supporting answer:

#3-14 Organization training and staff development regularly include issues of cultural diversity and anti-racism.

1 2 3 4 5

Evidence supporting answer:

#3-15 Staff members who are active in advancing diversity, inclusiveness, cultural competence and anti-racism are recognized, supported and acknowledged.

1 2 3 4 5

Evidence supporting answer:

#3-16 Management and staff actively participate in networking opportunities with culturally-specific organizations and professional associations.

1 2 3 4 5

Evidence supporting answer:

#3-17 Staff is skilled in providing culturally-appropriate referrals to clients the organization cannot serve.

1 2 3 4 5

Evidence supporting answer:

VOLUNTEERS

#3-18 Volunteers reflect the racial, cultural and ethnic backgrounds of the community(ies) they serve.

1 2 3 4 5

Evidence supporting answer:

#3-19 Volunteer recruitment strategies have been developed to target communities of color.

1 2 3 4 5

Evidence supporting answer:

#3-20 Volunteer training regularly addresses issues of race and culture and their implications for the organization and its programs.

1 2 3 4 5

Evidence supporting answer:

#3-21 Times and places of meetings and programs are flexible and accommodating to volunteers' schedules.

1 2 3 4 5

Evidence supporting answer:

#3-22 Networks in communities of color have been developed that can be used to access potential volunteers.

1 2 3 4 5

Evidence supporting answer:

#3-23 The organization has been successful in retaining or replacing volunteers of color and different cultures.

1 2 3 4 5

Evidence supporting answer:

#3-24 Volunteers are given special recognition for their services to the organization.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1	2	3	4	5

Evidence supporting answer:

#3-25 Volunteer recognition awards ceremonies reflect knowledge and sensitivity to community racial and cultural issues.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1	2	3	4	5

Evidence supporting answer:

OBJECTIVES FOR REPORTING PERIOD:

Community Partnership Practices

Instructions

The questions in this practice area are designed to measure your organization's progress toward achieving its inclusiveness objectives since the last reporting period. Community partnerships refer to the development of collaborations and partnerships with diverse communities in your organization's program area (see Organizational Practice Areas for further detail).

To complete the checklist:

- Answer all questions by checking the appropriate box (1-5) as it best reflects the **current** situation at your organization. Some questions may be more relevant to some organizations than others.
- Use “Evidence supporting answer” section to give specific examples of your organization's current status. For example, your organization set an objective to establish an advisory committee(s) with representation from different racial and cultural groups in the community, but the committees are not yet operational. You would check the box that best represents the progress your organization made, giving evidence to support your answer.
- Use the “Objectives” section to list specific goals that your organization would like to achieve by the end of its next assessment period. For example, an objective related to #4-3 could be to use broadcast and print media serving communities of color to inform them about your organization's programs, employment and volunteer opportunities.

#4 Community Partnership Practices

#4-1 The organization has sustained contact with individuals and organizations in communities of color.

1 2 3 4 5

Evidence supporting answer:

#4-2 The organization prepares and disseminates culturally specific program information in languages appropriate to the cultural group.

1 2 3 4 5

Evidence supporting answer:

#4-3 The organization uses various culturally specific communications organs in the community to provide information about organization programming that affects the community.

1 2 3 4 5

Evidence supporting answer:

#4-4 The organization uses its resources to support activities in the community relevant to different racial and cultural groups.

1 2 3 4 5

Evidence supporting answer:

#4-5 The organization makes its facilities available to different racial and cultural groups.

1 2 3 4 5

Evidence supporting answer:

#4-6 The organization uses an advisory committee which includes people of different races and cultures.

1 2 3 4 5

Evidence supporting answer:

#4-7 The organization supports and participates in neighborhood associations and culturally specific organizations.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1	2	3	4	5

Evidence supporting answer:

OBJECTIVES FOR REPORTING PERIOD:

Business And Administration Practices

Instructions

The questions in this practice area are designed to measure your organization's progress toward achieving its inclusiveness objectives since the last reporting period. Business and administration practices refer to the accessibility of your organization facilities, business contracts, and other contracting arrangements to communities of color (see Organizational Practice Areas for further detail).

To complete the checklist:

- Answer all questions by checking the appropriate box (1-5) as it best reflects the **current** situation at your organization. Some questions may be more relevant to some organizations than others.
- Use “Evidence supporting answer” section to give specific examples of your organization's current status. For example, your organization set an objective to compile and begin using a list of vendors and contractors of people of different races and cultures. Compilation of the list may have been completed, but no purchases or contracts have been made from vendors on the list. Check the box that best reflects your organization's progress toward its objective. Offer evidence to support your answer.
- Use the “Objectives” section to list specific goals that your organization would like to achieve by the end of its next assessment period. For example, an objective related to #5-4 could be to use vendors from the list during the year.

#5 Business And Administration Practices Checklist

#5-1 The organization’s vendors and contractors represent different racial and cultural populations.

1 2 3 4 5

Evidence supporting answer:

#5-2 The organization maintains an up-to-date list of vendors and contractors of people of different races and cultures.

1 2 3 4 5

Evidence supporting answer:

#5-3 The organization’s bank has a clear track record of providing services to communities of color on a non-discriminatory basis.

1 2 3 4 5

Evidence supporting answer:

#5-4 The organization uses culturally-specific media when advertising or soliciting business.

1 2 3 4 5

Evidence supporting answer:

#5-5 The location of facilities, programs and services are accessible by public transportation.

1 2 3 4 5

Evidence supporting answer:

#5-6 The organization has facilities located in communities of color.

1 2 3 4 5

Evidence supporting answer:

#5-7 The interior decor of organization's facilities reflects the organization's presence in a multicultural environment.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1	2	3	4	5

Evidence supporting answer:

OBJECTIVES FOR REPORTING PERIOD:

Inclusiveness Planning Worksheet

Instructions

This planning worksheet is intended to help convert findings of the Checklist into an action plan for increasing the cultural and racial inclusiveness of an organization.

Through the Checklist, organizations collect data on their **current** level of inclusiveness. This planning worksheet enables them to: 1) organize that data, 2) establish priorities for implementing objectives for improvement, 3) assign responsibility for implementing objectives, and 4) set key dates for achieving objectives.

To use the Inclusiveness Planning Worksheet:

- List the top three objectives for each practice area as identified in the checklist.
- Give each objective a priority rank of 1, 2 or 3.
- List who will be responsible for leading achievement on each objective by name and position.
- Establish key dates for when milestones toward achieving objectives should be completed.
- Sign and submit a copy of the planning worksheet to United Way Fund Distribution Committee as its inclusiveness “work plan.” The “work plan” is official when signed by a Fund Distribution Committee representative.

This planning worksheet or organization “work plan” is a key tool to be used by the Fund Distribution Committees in assessing an organization’s progress toward inclusiveness.

Inclusiveness Planning Worksheet

(Page 1 of 3)

PRACTICE AREA OBJECTIVES (EXAMPLES)	PRIORITY 1 = FIRST 2 = SECOND 3 = THIRD	RESOURCES/ RESPONSIBLE PERSON	KEY DATES
Governance			
1. Establish written recruitment strategies for reaching people of color to serve on the board of directors.	1 2 3		
2. Establish a board orientation/training format which includes cultural diversity and anti-racism issues.	1 2 3		
3. Increase the number of people on the board of directors.	1 2 3		
Programming			
1. Develop linkages with key people in organizations serving people of color to obtain feedback, establish referrals and build credibility.	1 2 3		
2. Allocate resources to culturally-specific program initiatives.	1 2 3		
3. Locate some key programs in geographic areas easily accessible to people of color.	1 2 3		

Inclusiveness Planning Worksheet

(Page 2 of 3)

PRACTICE AREA OBJECTIVES (EXAMPLES)	PRIORITY 1 = FIRST 2 = SECOND 3 = THIRD	RESOURCES/ RESPONSIBLE PERSON	KEY DATES
Human Resources			
1. Establish regular training for staff dealing with issues of cultural diversity and racism.	1 2 3		
2. Rewrite position description to value experience, competence and sensitivity in working with people of color.	1 2 3		
3. Review volunteer recruitment program (recruitment, retention, networking strategies) to ensure it is sensitive and accessible to people of color.	1 2 3		
Community Partnerships			
1. Develop an advisory committee reflective of the racial and cultural composition of service area.	1 2 3		
2. Develop cooperative working relationships through regular contacts with organizations and individuals of color.	1 2 3		
3. Publish organization brochures in at least two different languages.	1 2 3		

Inclusiveness Planning Worksheet

(Page 3 of 3)

PRACTICE AREA OBJECTIVES (EXAMPLES)	PRIORITY 1 = FIRST 2 = SECOND 3 = THIRD	RESOURCES/ RESPONSIBLE PERSON	KEY DATES
Business and Administration			
1. Develop a policy which ensures the use of culturally diverse vendors.	1 2 3		
2. Regularly monitor all organization facilities to ensure they reflect the multicultural composition of the community.	1 2 3		
3. Seek a banking institution which has a good record of meeting community credit needs as assessed by its Community Reinvestment Act Performance Evaluation.	1 2 3		

Authorized Representatives

Organization: _____
Name
Title

F D C: _____
Name
Title

Inclusiveness Report Form

Instructions for Completing the Form

This organization report form (Form) is intended to complement the planning worksheet and can be used to report organization progress. It is organized around the Tool's five organizational practices areas to report on progress over time.

To use the Form:

- List practice area objectives from the planning worksheet.
- List the priority (1, 2 or 3) assigned to each objective.
- List results for each objective. For example, list 5 if an objective was completed; 4 if substantial progress has been made; 3 if moderate progress has been made; 2 if there has been little progress; and 1 for no progress. For example, if an organization's objective was to review and rewrite all 20 of its position descriptions to reflect the value it gives experience, competence and sensitivity in working with people of different races and cultures, completing 15 or more would probably constitute substantial progress. On the other hand, completing only 3-5 reviews and rewrites represent little progress.
- Offer brief explanations when little or no progress is made under the evidence supporting answer section.
- Sign, date and submit the Form to the appropriate committee or party. The submitting party will retain a copy for its files.

The board of directors may use this form in its annual performance review of the president or executive director. This form may also be used internally by the president or executive director in the performance appraisal of department heads.

Inclusiveness Report Form

Instructions for Reviewing this Form

The Inclusiveness Assessment Tool is to be used by an organization over time to measure progress toward becoming more inclusive. The Tool is organized around five organizational practices areas which are incorporated into the Checklist and Progress checklists. First time use of the Checklist yields **current** practices data which can be used subsequently as a beginning point from which to measure progress. Objectives identified for each practice area can be used for subsequent review of progress. Subsequent uses (Progress Checklist) of the Tool yields data on organization progress in each practice area.

Organizations can use the Inclusiveness Planning Worksheet to: 1) establish priorities for implementing objectives, 2) assign responsibility for implementing objectives, and 3) set key dates for achieving objectives.

The planning worksheet will be submitted to the responsible committee or party as an organization “work plan.” The committee or responsible party will review the “work plan” and 1) approve as submitted, or 2) request specific changes, and 3) sign and date.

An organization is to use the Inclusiveness Report Form to record planning worksheet results and transmit them to the responsible party in that organization. The form will show organization progress on its priority objectives in each organizational practices area. The responsible party will use the Inclusiveness Report Form to review an organization's progress.

The review will include a discussion of:

- Process to develop a plan.
- Practice area's priorities.
- Organization's results in each practice area.
- Organization's overall practice area performance.
- Appropriate disposition regarding organization's progress.
- Organization's three year perspective.

The Fund Distribution Committee will record its disposition on the Inclusiveness Report Form in the space designated for that purpose and discuss implications of its decision with the organization. The Committee is offered four basic options:

1. Approve -- an organization's progress is consistent with what the Committees and the organization agreed to in the “work plan.”
2. Modify -- the Committee believes an organization needs to make changes in its “work plan” to more effectively reach its objectives or to state objectives more clearly. The Committee may ask an organization to consider specific tasks, e.g., providing board, staff and volunteers with special training on issues of race and cultural or to rewrite certain objectives.
3. Extension -- there may have been factors beyond an organization's control that affected its ability to reach its objectives by the key dates in the “work plan.” The Committee will decide on a case-by-case basis what may justify approving an extension.
4. Sanction -- this option is available to the board/president or executive director when an organization has failed to make acceptable progress within the time frame mutually determined by the board and the staff.

The board of directors or the CEO of an organization can use the Inclusiveness Planning Worksheet (“work plan”) and the Inclusiveness Report Form to monitor organizational staff progress toward inclusiveness. Consequently, each party can be provided with information to assist in constructive decision making.

Inclusiveness Progress Report Form

(Page 1 of 3)

PRACTICE AREA OBJECTIVES	PRIORITY LIST (1, 2, OR 3)	RESULTS 1 None 2 Little 3 Moderate 4 Substantial 5 Complete	COMMENTS
Governance			
1.			
2.			
3.			
Programming			
1.			
2.			
3.			

Inclusiveness Progress Report Form

(Page 2 of 3)

PRACTICE AREA OBJECTIVES	PRIORITY LIST (1, 2, OR 3)	RESULTS 1 None 2 Little 3 Moderate 4 Substantial 5 Complete	COMMENTS
Human Resources			
1.			
2.			
3.			
Community Partnerships			
1.			
2.			
3.			

Inclusiveness Progress Report Form

(Page 3 of 3)

PRACTICE AREA OBJECTIVES	PRIORITY LIST (1, 2, OR 3)	RESULTS 1 None 2 Little 3 Moderate 4 Substantial 5 Complete	COMMENTS
Business and Administration			
1.	1 2 3		
2.	1 2 3		
3.	1 2 3		

Fund Distribution Committee (FDC) only:

Disposition

Approved _____

Modify _____

Extension _____

Sanctions _____

Authorized Representatives

Organization: _____
Name
Title

F D C: _____
Name
Title

Our mission is to help increase the effectiveness and impact of socially concerned organizations in responding to social problems. We work in support of organizations and communities to help them achieve their goals.

Your organization and community can experience these results from participation in Rainbow Research activities – tailored studies, workshops, and partnerships – and use of our tools and publications.

We can help you to:

Improve your understanding of key program elements that contribute to program effectiveness.

Improve program impact through integrating principles of program effectiveness into day-to-day operations.

Improve management of resources to achieve program purposes.

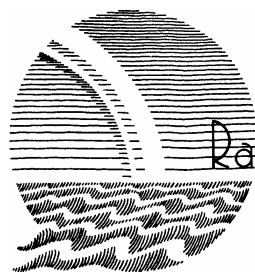
Improve the fit between your organization's activities and your community's needs and opportunities.

Improve commitment of staff and Board to your organization's mission.

Improve communication between your organization and its various stakeholders and publics.

Improve linkages between your organization and other like-minded organizations.

Improve access to tools and support services that strengthen program performance.



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