

Equity Toolkit

2023



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INTRODUCTION

Resolution Washington is committed to equal justice for all marginalized community members and supports people of color and low-income residents in having access to equitable opportunities statewide. To that end, Resolution Washington has joined The Washington Race Equity & Justice Initiative (REJI), a network of people, communities and organizations working together for racial fairness and justice in the law, legal profession, and justice systems. REJI is working to coordinate and grow a sustainable statewide community of legal and justice system partners in Washington State who can more effectively and collaboratively work toward eradicating racially biased policies, practices, and systems.

REJI recognizes that the social, economic, legal, civic, and political structures that we have created reflect, produce, and maintain racialized outcomes. These structures and systems systematically bar certain racial groups from fully participating in society, target them for discrimination, and take away power and resources. The work of REJI aims to end these historic patterns.

As a member of REJI, Resolution Washington shares their vision of a community free from bias, systemic unfairness, and oppression, where everyone is treated with dignity and respect, where everyone deserves access to affordable, safe, and stable housing, quality education and health care, a legal system that delivers justice to all, a sustainable source of income, fair treatment by financial institutions, ample and nutritious food, clean water, and freedom from environmental hazards.

Resolution Washington understands that ensuring racial equity needs to be a core component of strategy plans if Resolution Washington expects to embed inclusion, diversity, equity, and access (IDEA) values into its organization. They recognize the need for a clear strategic framework that grounds their race and equity work in the overall strategic goals. To do this, requires clearly stated expected outcomes for race, equity, inclusion, and a specific intervention that addresses the current needs, issues and challenges faced by the diverse communities in Washington. This requires a detailed equity action plan and equity 'lens' for ongoing monitoring and assessment of the performance of their specific IDEA outputs and outcomes.



The purpose of this toolkit is to add to any existing resources already acquired by Resolution Washington and demonstrate how a race equity lens can be adopted by the association and its Dispute Resolution Centers (DRCs) working directly with employees, with systems, technical assistance providers and/or communities. The aim is to provide transferable insights and tools that can help Resolution Washington understand what steps to take to make sure they are creating equitable opportunities for its workforce and the populations they serve.

WHAT IS AN I.D.E.A.L. WORKPLACE?

An IDEAL workplace is one in which individuals feel safe, valued, and affirmed, where culture is aligned with the mission, vision and goals of the organization and where social justice values are seen as Inclusive, Diverse, Equitable, Accessible and Longitudinal (IDEAL). Let's break down the components of the I.D.E.A.L. workplace.

Inclusion is about actions – Inclusion in the workplace is about the actions and behaviors we take to create a culture in which employees feel valued, trusted, and authentic. In an inclusive environment, everyone is encouraged to contribute fully and thrive. Without inclusion, many are marginalized economically, politically, and culturally, facing bias and barriers when seeking basic opportunities for security and advancement. Belonging is a feeling – Belonging at work is a feeling of community with the people and environments that make us feel connected. Psychological safety is what makes us feel we belong. When you feel psychologically safe, you believe others will give you the benefit of the doubt. You can ask questions and raise issues without fear. You can be vulnerable with others and be who you are — which, in turn, helps you connect with others. Psychological safety is what creates the most high-performing teams, where members build and learn and grow together, push back against the status quo, and innovate.

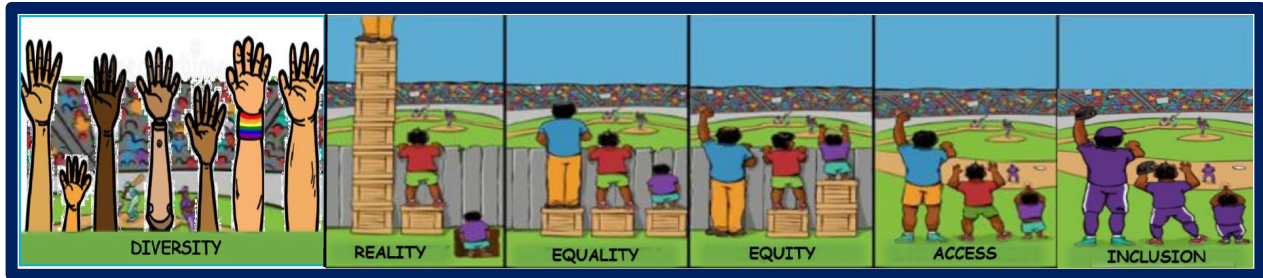
Diversity is representation – Diversity is about hiring in such a way that your organization reflects the global communities in which we operate. The benefits of a diverse company are tangible. Teams with diverse

members with different work styles, problem-solving techniques, life experiences, backgrounds, perspectives, and skill sets are more likely to be innovative. Because if you have nothing but like-minded people on a team, your thinking isn't likely to be challenged. Inclusive businesses have also been found to be more profitable and generate higher revenues. After analyzing 180 companies across the United States and Europe, McKinsey found that the companies with more diverse top teams were more likely to be top financial performers. The same source also found that companies in the top quartile for gender diversity on executive teams were 25% more likely to have above-average profitability than companies in the fourth quartile for diversity. The key to understanding the positive influence of diversity is the concept of informational diversity. When people are brought together to solve problems in groups, they bring different information, opinions, and perspectives. This makes obvious sense when we talk about diversity of disciplinary backgrounds—People who are different from one another in race, gender, and other dimensions bring unique information and experiences to bear on the task at hand.

Equity is the concept of treating everyone fairly by acknowledging everyone's unique situation and addressing systemic barriers. The aim of equity is to ensure that everyone has access to equal results and benefits. It is important to define equity for your organization and community. Equity and equality are not synonymous. You have probably seen an image or series of images like this to help explain the difference between equality and equity, and to visualize what it would look

like if there were no systemic barriers. While the visual metaphor may be imperfect, it provides a compelling way to understand equity and to begin a dialogue about these important concepts in social groups and organizations.

they are compliant with [Americans with Disabilities Act \(ADA\)](#), which prohibits discrimination against job seekers and employees with disabilities. The ADA requires employers to provide “reasonable accommodations,” which level the playing field by



Organizations often confuse equity with equality, or equity with nondiscrimination. There are distinct differences among these terms. Equality is treating all people the same and giving them the same support. Nondiscrimination promotes equal opportunity and treatment for all based on local, state, or national identifiers such as race, color, age, religion, sex, sexual orientation, national origin, or handicap/disability. However, equity is the just and fair distribution of resources based on each individual’s needs. A focus on equality alone does not address the different and often inequitable experiences and opportunities of certain people groups. Having a clear definition of equity that is shared, understood, and practiced by members of the organization sets the foundation for the comprehensive and consistent practice of equity.

Accessibility – refers to the removal of barriers so that a workplace can be accessed by workers with diverse abilities and needs. A barrier does not have to be physical. It can also be something such as a rule, law, or policy that makes it difficult or impossible for something to happen or be achieved. At minimum, accessible organizations, ensure

making physical workspaces accessible and giving workers the tools they need to do their jobs.

A **longitudinal** study (or longitudinal survey) is a research design that involves repeated observations of the same variables (e.g., people) over short or long periods of time. It is often a type of observational study, although it can also be structured as longitudinal randomized experiment. Longitudinal studies are often used in social-personality and clinical psychology, to study rapid fluctuations in behaviors, thoughts, and emotions from moment to moment or day to day; in developmental psychology, to study developmental trends across the life span; and in sociology, to study life events throughout lifetimes or generations; and in consumer research and political polling to study consumer trends. Because change takes time and does not happen overnight, it is important for organizations to adopt a long-range approach to organizational transformation. Keeping cognizant of the “long game” ensures organizations are prepared for the requisite commitment of time, labor and money needed.

WHY A SYSTEMS APPROACH IS IMPORTANT

To bring about constructive change, organizations need to develop the habit and the capacity to think systemically in order to better understand how systems of advantage create inequities. Systems of advantage are embedded in history, culture, and identity. They have internal components and external components. These components are moved by power and economics. The internal components are shaped by biases, privilege, and internalized messages about race. The external components play out in relationships which are interpersonal, institutional, and structural.

Internalized: refers to biases and ideas about race induced by our human predisposition to form in-groups and out-groups and the impact of internalized racialized messages. When these processes are combined with our natural tendency to follow cognitive scripts, we begin to experience dissonance between our conscious values and unconscious biases.

Interpersonal: refers to internalized cultural messages that are shared through personal interactions. Since human beings do not live in isolation, these messages are sustained through shared practices that often include some individuals and groups and exclude others.

Institutional: refers to institutions and organizations adopting and/or maintaining policies and procedures that result in inequitable outcomes for people of color.

Institutional racism may occur within schools, courts, the military, government agencies, businesses and any number of other organizations and societal structures. Some of these institutional practices

lead to disparities in employment, education, incarceration, health and more.

Structural: refers to the way historical, social, psychological, cultural, and political norms perpetuate advantages based on race. An example would be the way racial disparities in income, wealth and access to quality education originated from a combination of factors including our history of slavery, Jim Crow laws and educational or governmental policies that created access for some and barriers for others.

To dismantle inequities, organizations need to promote a shared understanding of the role that history and culture play in perpetuating racial disparities. Through this shared knowledge, they can develop intentional approaches to dismantle institutional and structural inequities that are found across indicators for success, such as education, employment, housing, health, quality of life and incarceration, etc. Race continues to play a defining role in one's life trajectory and outcomes. A complex system of racial bias and inequities is at play, deeply rooted in our country's history, culture and institutions. If our nation is to live up to its democratic ideals — that all people are created equal and treated fairly — then racial equity and inclusion must be at the forefront of how we shape our institutions, policies, and culture.

SHARED LANGUAGE AND UNDERSTANDING

There are many ways to think about and understand social justice, but by sharing a common language, we can achieve greater strength and understanding. To increase shared understanding, it is important to clearly define the terms we use in conversations. Words with different meanings are often used as synonyms in discussions about race, which can lead to confusion. Although the terms in the *Equity Glossary* (refer to Appendix A) are interconnected, they are not synonyms and must be used with precision.

Often, race-focused conversations derail because people are using the same terms in different ways. One of the challenges of communicating effectively about race is to move people from the narrow and individualized definition of racism to a more comprehensive and systemic awareness. Establishing a shared language to present data, describe conditions and outcomes and identify root causes of inequities serves an important function. A common language creates a narrative that makes it easier to communicate the commitment to racial equity, both internally and externally, and it creates a platform for coordinated work toward equitable outcomes.

Words and their multiple uses reflect the tremendous diversity that characterizes our society. Indeed, universally agreed upon language on issues relating to racism is nonexistent. Often, even the most frequently used words in any discussion on race can easily

cause confusion, which leads to controversy and hostility. It is essential to achieve some degree of shared understanding, particularly when using the most common terms. In this way, the quality of dialogue and discourse on race can be enhanced.

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Language can be used deliberately to engage and support community anti-racism coalitions and initiatives, or to inflame and divide them. Discussing definitions can engage and support coalitions. However, it is important for groups to decide the extent to which they must have consensus and where it is okay for people to disagree. It is also helpful to keep in mind that the words people use to discuss power, privilege, racism, and oppression hold different meanings for different people. For instance, people at different stages of developing an analysis tend to attach different meanings to words like discrimination, privilege, and institutional racism. Furthermore, when people are talking about privilege or racism, the words they use often come with emotions and assumptions that are not spoken.

[APPENDIX A: Refer to Equity Glossary](#)

PURPOSE OF THE EQUITY TOOLKIT

Community Business Organizations (CBOs) like Resolution Washington's Dispute Resolution Centers and agencies of local governments are closest to the people. As such, they possess a unique and significant role in advancing racial equity. These institutions can advance racial equity by revising or removing harmful laws, policies, and practices, creating new laws, policies, and practices to eradicate barriers, and collaborating with influential institutions, and systems to advance equitable outcomes. By eliminating inequitable policies and practices, municipalities, local government, and CBOs opens the door for more participation and access to opportunities that encourages cultural competency through shared learning.

By using an Equity Toolkit, Resolution Washington can develop a framework, strategy and the resources needed to intentionally disrupt unintended outcomes and maximize the effectiveness of strategies designed to eliminate racial inequities. Given the complicated and pervasive nature of discrimination, this effort requires focus and specificity, as each inequitable outcome requires a tailored strategy that:

- Seeks to proactively eliminate racial inequities and advance equity.
- Identifies clear goals, objectives, and measurable outcomes.
- Engages stakeholders in decision-making processes.
- Identifies who will benefit or be burdened by a given decision, examines potential unintended consequences of a decision,

advances racial equity, and mitigates unintended negative consequences.

- Develops mechanisms for successful implementation and evaluation of impact.

This equity toolkit is a compilation of frameworks, strategies, implementation processes and resources. It serves as a step-by-step guide to help Dispute Resolution Centers start their equity work. While the toolkit has a general structure, it is by no means a one-size-fits-all model. It is a beginning guide providing tangible options that can be best suited to the demographics and needs of DRC staff, communities, and goals. With this toolkit, Resolution Washington can better assess their internal and external capabilities to accomplish their equity goals.

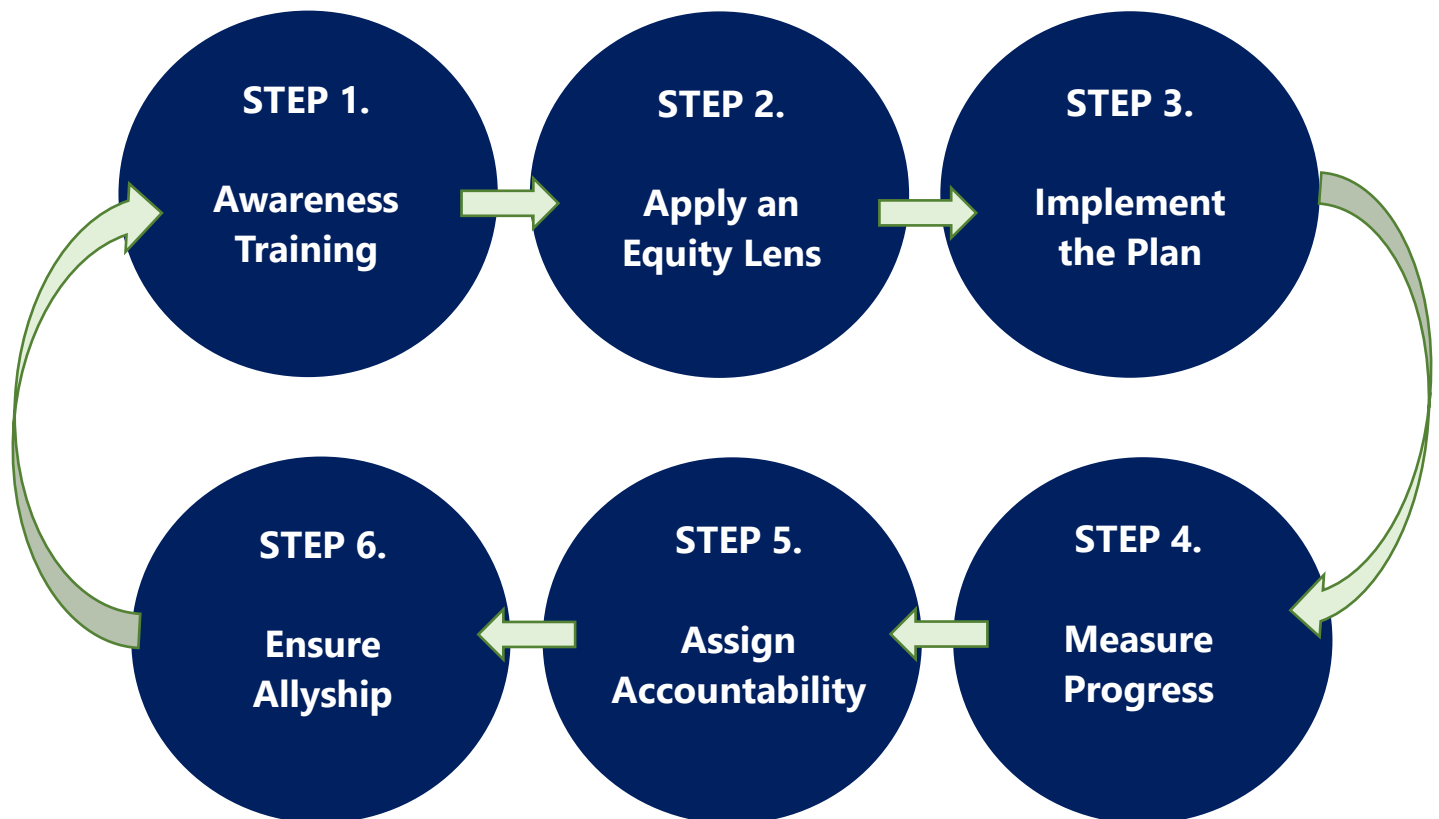
The equity toolkit discusses how to begin an honest conversation on equity. Organizations then move to information gathering to understand the specific racial inequities within their work environment. Equipped with a better understanding, DRCs can then begin developing a strategic plan to address inequities. One approach may be to pilot test the plan by working with a particular program or initiative, and modifying the plan as needed. During and after the implementation phase, DRCs will want to continuously evaluate their work and make changes as needed.

This toolkit enables Resolution Washington and its members to be deliberately inclusive as they make decisions and help decision-makers focus on equity in both their processes and outcomes.

CREATING AN EQUITY ACTION PLAN

An Equity Action Plan describes a process, not a product. A successful process will build staff capacity needed for implementation and can familiarize staff with the organization's equity vision and theory of change. The action plan process focuses on systemic discrimination, advancing equity in the Resolution Washington activities, improving outreach and access to underserved and/or excluded communities, and serves to represent Resolution Washington's commitment to redress inequities and to promote equitable outcomes.

An Equity Action Plan is a means to assess whether underserved stakeholders, communities and their members face systemic barriers in accessing benefits and opportunities through Resolution Washington, helps to summarize actions taken to support members of marginalized, vulnerable, underserved and/or excluded communities. It outlines the steps necessary to advance equity across the organization, explains why embedding equity in everything the organization does is critical to unlocking equitable opportunities for everyone while allowing the organization to reflect on the progress continually being made.



There are 6 distinct steps to every successful **Equity Action Plan**;

1. **Awareness Training** – When organizations question their own ideas, they can open to new ways of understanding and how multiple factors influence the way they provide services, design policies and programs, or interact with staff and clients.
2. **Apply an Equity Lens to Decisions** – An Equity Lens is the process of interrogating the decision process by asking questions like, “Why do we do what we do?” or “Is the way we do things, producing the results we desire?”, etc. By filtering decisions through an equity lens, equity begins to be threaded throughout the work. Equity lens worksheets can help document your decision inquiries.
3. **Implement the Plan** – Organizations must be prepared to take transformative actions such as abandoning old structures, strategies and policies and replacing them with new ones. For this reason, organizations must be sure action plans include sufficient funding and staffing.
4. **Measuring Progress** – Clearly defined benchmarks, milestones should be tracked and monitored for both qualitative and quantitative data and the results synthesized and evaluated on a regular basis. At a minimum, progress reports should document challenges faced, plans for addressing challenges or how the outcome or action might be refined in the future.
5. **Assign Accountability** – Whether the organization appoints IDEA Officers, Advisory Boards, or Committees, someone

must assume the responsibility for educating colleagues on diversity and the effects of discrimination; reviewing policies and workplace culture; and documenting, identifying, and enhancing necessary tools and strategies.

6. **Ensure Allyship** – Employee Affinity Groups and/or Internal IDEAL Champions and/or IDEAL Ambassadors are designated employees responsible for instilling the IDEAL work culture by fostering authenticity, employee well-being and trust and celebrating diversity.

The standard elements of the equity action plan toolkit ask for decision-makers to consider equity dimensions of involvement, process, values and assumptions, and outcomes, from a perspective that highlights how practices hold potential to shift power toward inclusion and equity. Leadership will gain a clearer, more focused, complete perspective on, whether or not their IDEAL values are genuinely and authentically embedded into their strategic decisions, work culture and day to day business activities while at the same time establishing accountability to IDEAL outcomes, benchmarks, and equity disciplines.

Transforming an organizational culture takes time and requires that organizational leaders constantly re-evaluate decisions, judgements, and behaviors to make sure they are not creating or exacerbating barriers to equity and inclusion for workers, clients, beneficiaries, and stakeholders. Diversity Equity, Inclusion, & Accessibility must first be understood, acknowledged, shared, and practiced consistently by everyone, throughout the organization at ALL levels if the values are to be embedded and practiced systemically.

Awareness Training –

For organizational practices to be effective, systems must acknowledge and affirm the experiences and values of diverse cultures, languages, classes, races, ethnicities, religions, and other factors. While initiating dialogues around sensitive topics can be a difficult process, they are an important part in building a foundation for change. Equity requires leaders to recognize and address their own biases and stereotypes about their workforce to create a positive and inclusive educational environment.

Diversity, equity, inclusion, belonging, and accessibility trainings are an effective means for introducing conversations about race and generating awareness of the topics. Trainings should be designed to motivate employees to adopt behaviors that mitigate bias and empower individual diversity advocates. Learning outcomes are those that create pathways for recognizing each organizational member as an important partner necessary for co-creating and co-owning strategies and solutions for transforming workplace culture.

Trainings should help employees develop skills and attitudes that can help bridge cultural differences with colleagues and customers while learning awareness for engaging identities and identity issues across all groups and communities: gender, ability/disability, religion, sexual orientation, socioeconomic status, race, ethnicity, language, and nationality. Ultimately, trainings should inspire people to act – with passion and purpose to achieve a bold, aspirational opportunity while building momentum that excites the workforce to pursue a compelling (and clear) vision of the future...together.

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Training can be a useful component of inclusion, diversity, equity, and access efforts. However, the reality is that not everyone wants equity and periodic training does not “fix” the problem. Change is a subjective experience and can be hard when people don’t know why there is a need to change. People can be uncomfortable when they are forced to look in the mirror and face their own biases. When people resist change, it can usually be traced back to a lack of awareness of why the change is necessary, now.

Work to establish trust and rapport with those who are skeptical. By focusing on positive outcomes, the training, gives employees the choice to become diversity and inclusion champions as a reflection of their personal values and can be an effective tool to motivate employees to engage in new behaviors that complement and accelerate more structural efforts. Training does have its limitations. There are no clear-cut criteria, outcomes, or undisputed bulletproof benchmarks to determine whether racism and other forms of prejudice and discrimination have been significantly mitigated by training alone. Ultimately, it is a commitment of Resolution Washington to consistently evaluate and innovate organizational processes — including the systems that allow for bias in the first place — that will have the most sustained impact on achieving equity goals. Without ongoing efforts, training becomes unsustainable and irrelevant.

[APPENDIX B: Refer to Equity Training Resources – Videos/Articles /Reports](#)

Apply An Equity Lens to Decisions –

A value system consists of ethical and moral principles guiding decisions, behaviors and judgements made by an organization. Inclusion, diversity, equity, and access (IDEA) are not a set of “tasks” to be performed and completed but rather “values” that are lived out in the daily practice of conducting business. The proof that IDEA is incorporated into an organization’s value system is evidenced not only by what is written or spoken, but also by the actions, behaviors, decisions, and judgements – of the organization as a whole, as well as the individuals who comprise the organization. It is the value system that sets the tone and defines the basis for the organizational culture.

The challenge in any equity & social justice initiative is operationalizing the IDEA values. In other words, moving from awareness to implementation. An Equity Lens is a decision-making tool to make sure organizational leaders are not creating or exacerbating barriers to opportunity for their workforce, beneficiaries and constituents and helps leaders develop more equity-focused policies and programs. An equity lens is comprised of key questions organizations should ask to better recognize and mitigate inequities within their policies and practices, such as:

- Why do we do it this way?
- Is this process a best practice?
- Are there unintended outcomes?
- Is it creating inequities and/or gaps?
- Are the outcomes aligned with our values?
- Are we addressing systemic issues?
- Etc.

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Having an equity lens ensures leaders are trained in developing more equitable policies and practices while addressing systemic barriers and inequities people face. The “lens” serves as a resource for leaders, intended to guide them in; creating a positive and respectful work environment; analyzing organizational policies, programs, and practices; identifying action steps necessary to build a foundation for equity and inclusion; incorporating a diversity of perspectives to strengthen the capacity of work teams; and becoming more culturally sensitive and aware.

Applying an “equity lens” is the **habitual practice** of asking key questions to reflect on the equitableness of actions in each of the decision-making processes (past, present and future) to better recognize, address and mitigate inequities and/or exclusions within organizational practices, culture, policies & procedures.

A habit of evaluating operational practices, processes, policies, and procedures through the **Equity & Inclusion Lens Worksheets**, (refer to Appendix D) will help organizations gain a clearer, more focused, complete perspective on whether or not their IDEA values are genuinely and authentically embedded into their work culture and day to day business activities.

[APPENDIX D: Refer to Samples of Equity Lens Worksheets](#)

Implement the Plan –

Organizations need to develop an action plan and/or policies to incorporate equity into their organizational structure. Equity should serve as the foundation that permeates all aspects of the business. Equity-focused action plans and policies can produce systemic change that benefits all stakeholders. Having a clear plan of action is essential to grow knowledge, build capacity, include diverse voices, promote accountability, implement effective practices, produce partnerships, and eliminate barriers.

Critical to design is ensuring that both staff and management is engaged in all phases of transformation efforts – problem definition, identification of potential interventions and solutions, strategy design and development, definition of outcomes and their indicators, performance monitoring, program adjustments, evaluation of outcomes and impact, and scaling and sustaining successes.

An internal strategic document that clearly lays out what the company will do to accomplish its diversity, equity, and inclusion goals. A typical IDEA Plan is structured with goals, objectives strategies actions and a scorecard. The IDEA plan should align with the company’s overall goals.

When creating the IDEA Plan, do not just focus on the tactical. Consider the transformational. A comprehensive IDEA and cultural audit are highly informative when creating an IDEA Plan. The audit report findings provide recommendations, key indicators, and implementation details specific to the recommendations. Using an outside, neutral

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agency to complete the audit is recommended.

Opportunity gaps can be attributed to barriers created by policies, practices and procedures that create inequitable access to opportunities. “Nondiscriminatory” policies and practices are different from equity, both in legal application and practical implementation. Policies and practices that do not explicitly target specific groups may still disadvantage them. For example, hosting in-person mediation sessions does not appear to discriminate. However, stakeholders who do not have access to cars or reliable public transportation face barriers to receiving services, and this could disparately impact low-income clients. It is important to analyze policies and practices with an equity lens as this approach may surface previously unacknowledged barriers to opportunities and engagement.

There is a distinct difference between an action plan and an equity policy. Action plans can serve as the blueprint to moving equity forward — they provide the *step-by-step* elements for building the foundation and implementing equity in programs and activities. Action plans can be specific and time-sensitive, but do not hold the organization legally liable. A policy is a foundational statement that charts the course of action and documents the board’s direction for the organization. Policies carry the weight of local law and provide the board’s guidance for embedding equity into identity and

practices. Policies do not include specific procedures and are not time-sensitive. The success of equity-focused action plans or policies requires stakeholder participation at all levels to make sure that the needs of the stakeholders are acknowledged and addressed.

Consider budgetary and staff needs. Depending on the number of needs and capacity of the staff doing the work, organizations may be able to outsource some parts of the plan. It is important to designate a team or senior manager/supervisor who will champion the plan and push it forward regardless of how many staff or how much money is allocated to the efforts. When it comes to implementation, the question is not just about budget allocation, but the entire cost of an authentic strategic approach to IDEA. This includes hiring or allocating staff, the cost of revising processes, the cost of collaborating across stakeholders and most importantly the cost of prioritizing IDEA alongside other strategic initiatives.

The final step in the planning process is to anticipate unintended consequences of your work and mitigate these challenges if possible. One unintended consequence may be pushback from different segments of the workforce and/or community. Whatever the unintended consequence may be, it is the job of the strategic plan champion to articulate the importance of advancing racial equity to jettison deeply-held and often unconscious beliefs and structures that create and re-create systems of advantage.

At every step of the action plan, organizations should be actively engaging stakeholders. Their insight is valuable to incorporate equity in organizational practices and community engagement. Leaders must actively involve stakeholders specifically from communities that face barriers to engagement. Practicing inclusivity and transparency with your community develops trust among stakeholders.

[APPENDIX C: Refer to Samples of Implementation Plans](#)



Measure Progress –

A 2021 survey by *Harvard Business Review Analytic Services and the Society for Human Resource Management* indicated that tracking metrics was a key driver in improving IDEA outcomes in the workplace and differentiated organizations that are successful from those that fall behind. Diversity scorecards are a sound way to monitor these metrics and help companies:

- Hold leaders accountable.
- Measure the return on key investments.
- Identify potential areas of inequity and more quickly understand where to develop plans.
- Provide a common language for communicating progress.
- Think strategically about where they need to go and how to get there.
- Provide proof of performance.

Typically, data is reported for whole populations or as aggregates. However, data in all focus areas of organizations and systems should be broken apart by race, gender, and other demographic variables whenever the data is available. The collection, analysis and use of race and ethnicity data should be an integral part of the continuing improvement efforts, quality assurance, supervision and accountability processes of every organization and public system.

To measure the success and ROI of initiatives, companies will need to look at a variety of IDEA data metrics. With a data-driven approach, an IDEA strategy can go from an item on a checklist to a valuable program that makes a difference. IDEA data provides a clear view of the demographics and

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sentiments of the people and whether they can thrive in the transformed work culture. The data then can be used for making decisions that promote progress. This begs the question, “What sort of IDEA data should be tracked?” The following are useful metrics to note.

1. Demographics across organization

Levels – It often happens that the organization is diverse at the employee level but less diverse higher up. That’s why you need to understand your employee demographics not only on the company level but also across different levels all the way to the leadership. To calculate demographics across organization levels, you would divide the number of people in a particular demographic group by the total population. For example, let’s say you were calculating the number of senior managers (400) between the ages of 60 – 65 (20). Your calculation would be: $20/400 = 0.05$ or 5%. This is a good starting point and would be known as your baseline data.

2. Retention across employee groups –

Drilling down into your retention data will help you uncover if there are any retention issues with particular groups of employees. To calculate the employee retention rate, use the usual retention rate formula, but use the specific data of the employee group you’re calculating. As an example, if you were to calculate the employee retention rate of women,

your formula would look something like this:

*The employee retention rate of women =
Total # of employees – Total # of women
who left / Total # of employees x 100*

You can segment your population group even further to gain more interesting insights. For example, you might want to combine age group and gender. Or different generations (Gen Z vs. Millennials vs. Baby Boomers) and calculate the difference in retention rate. You can combine these retention rate results with exit survey data to drill down into more specific reasons as to why employees of a particular demographic group are staying or leaving, and take action.

3. **Employee turnover** – Retention rates look at the percentage of people who stay, whereas turnover looks at the percentage of people who leave. In general, employee turnover is a key metric to track for HR professionals. You can drill down to the results. The turnover rate across employee groups based on gender, age, or race is an essential calculation to consider. For instance, if an organization had 200 employees in the ‘Baby Boomer’ age group and 30 employees left, the formula would look like this:

*Turnover rate for Baby Boomers =
30 / 200 = 15%*

4. **Adverse impact** – Calculating adverse impact allows you to measure the potential adverse impact at each stage of the employee life cycle and then address it. It identifies discriminatory practices and ultimately makes HR processes fairer. For example, if you have a discriminatory

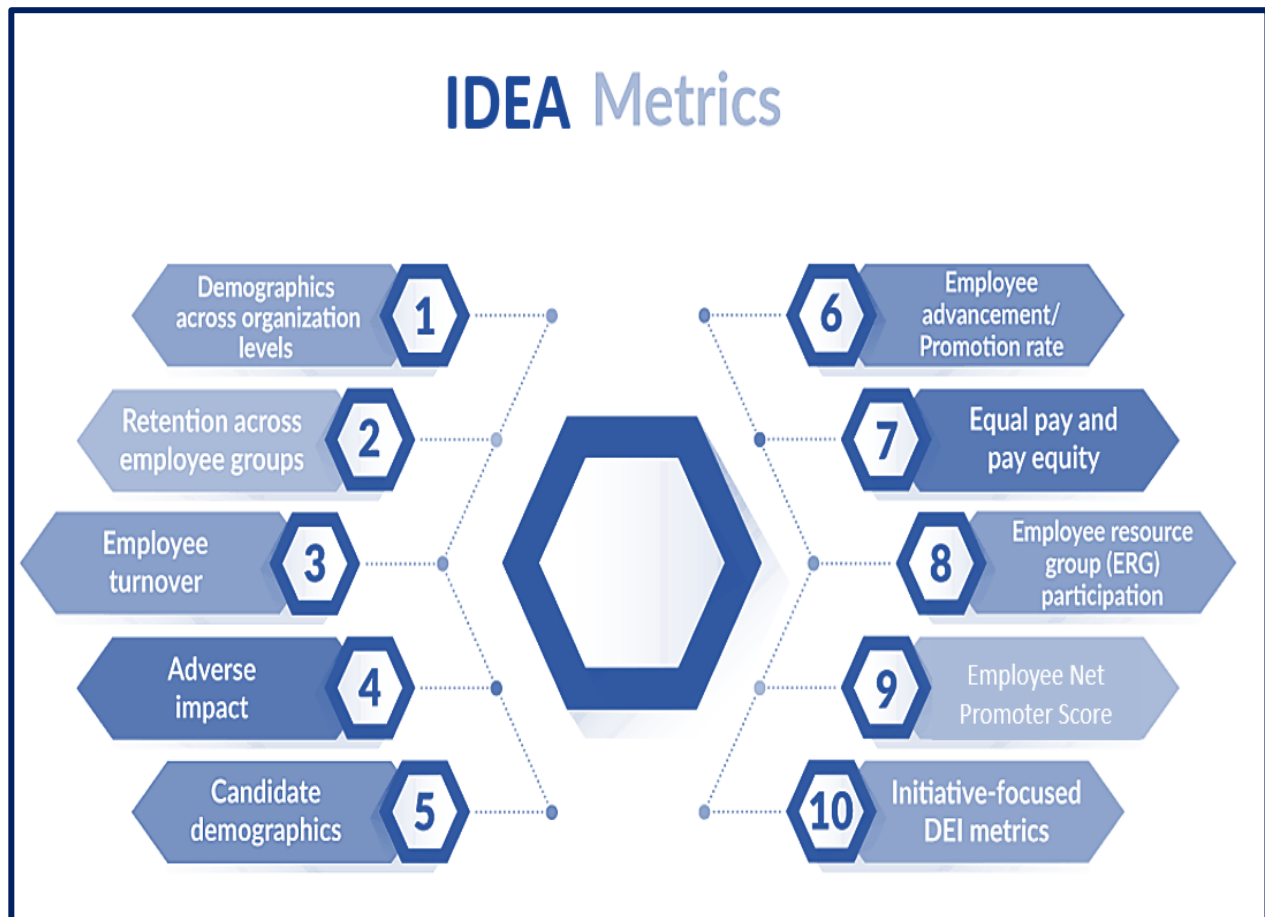
practice in your recruitment stage, it trickles throughout the organization and has an adverse effect on the organizations’ diversity, equity & inclusion efforts. To calculate adverse impact, you need to make use of the “Four-Fifths Rule.”

The Fourth-Fifths Rule means that the selection rate of protected groups – which include race, sex, age, religion, disability status, and veteran status – should be 80% or more of the selection rate of non-protected groups to avoid adverse impact against the former.

To calculate adverse impact, there are four steps. We’ll use the recruiting process as an example:

- a) Determine the selection rate for each group. (For example, there are 100 applicants, and 10 of them are African-American, that’s 10%.)
 - b) See which group has the highest selection rate. (Let’s say, for example, Latinos had the highest selection rate at 40%.)
 - c) For each group, determine the impact ratio by comparing it to the highest selection rate.
 - d) Determine if the rate is less than the selection rate for the highest group. This is the four-fifth rule, in other words, at 80%. If it is less, then it means an adverse impact has been identified. In our case, 10/40 is 25% which is less than 80%. Adverse impact is present.
5. **Candidate demographics** – What kind of candidates are you attracting? Which sources from? How is diverse talent progressing through the funnel? This will

give you an indication of which sources attract candidates from diverse backgrounds, if you use inclusive language in your job postings, etc. You can collect candidate demographic data anonymously during the application process. For each stage and each demographic group, calculate it as a percentage of the total number of candidates through each stage. Besides doing the demographic calculation at each step of the process, it's also a great idea to ask your talent acquisition professionals to take **Harvard's Implicit Association Test**. (refer to Appendix B.)



- 6. **Employee advancement / Promotion rate** – Used to calculate employee advancement or promotion rate. Once you have the overall number, you can start looking into promotion rates across different groups and how they compare to your general employee advancement rate. To calculate, use the formula:

Number of employees promoted in the group / headcount.

7. **Equal pay and pay equity** – Looking at pay disparities within your organization will help you uncover potential issues with your pay practices and design solutions to remedy them. One of the most notable issues in diversity is equal pay for equal work. To determine if people from different demographic groups are compensated differently for doing the same work it is important to calculate this regularly. Let's use gender as the variable to understand the calculation. To calculate on average, if there is a gender pay gap, you would need to calculate the average hourly pay of male employees and female employees. Then, add up the average hourly pay of all male employees, and divide it by the number of male employees. Do the same for female employees. Then subtract the average female hourly rate vs. the average male hourly pay rate, divided by the average hourly pay rate for males, multiplied by 100. For example, an organization has an average hourly pay rate for males at \$50, whereas for females, their pay rate is \$42.

$$\begin{aligned} \$50 - \$42 = \$8 \text{ and } \$8 / \$50 = \\ 0.16 \times 100 = 16\% \end{aligned}$$

Therefore, the average gender pay gap is 16%. You can do the same calculation for other demographic groups.

8. **Employee resource group (ERG) participation** – ERGs aka Affinity Groups aim to give a voice to various groups in the workplace. Knowing the participation rate will help you determine if these groups actually serve their purpose. You can understand ERG participation by looking at the frequency of meetings and initiatives and the effectiveness of any

projects. You can also calculate the overall participation of employees in ERGs by taking the number of employees actively participating in ERGs divided by the number of employees in the organization. It would also be good to note which ERGs are most active and why.

9. **Employee Net Promoter Score** – This is an internal measurement that offers a metric to track how your employees feel about your company. Think of it as a mini employee satisfaction survey. It's a one, open-ended-question survey with some variation of a simple question: How likely are you to recommend our company to a friend or acquaintance? The results can provide insight into employee engagement and satisfaction.

- Net Promoter Score employee surveys use a numerical scale, usually from zero to 10. You can use a scale of zero to five, but the 11-point system allows for more variance and can give more accurate results, both on the positive and the negative sides. Based on the answers, employees are grouped as promoters, neutrals, or detractors. Here is a breakdown of each category:
- Promoter: Anyone who chooses nine or 10 as their score is a promoter, meaning they're generally happy and engaged employees.
- Neutral or passive: Scores of seven or eight fall into the neutral or passive category, so they don't actively promote the business, but they also don't spread negativity about your organization.
- Detractor: Anything from zero to six falls in the detractor category, meaning they're likely unhappy and disengaged employees.

10. Initiative-focused IDEA metrics – These are metrics that measure the outcomes of IDEA-focused initiatives. For example, if you were to run an accelerated leadership program for Black employees, you would need to be able to measure its success. This is not only to establish if the participants completed the program but also the financial and business outcomes of the program. You would need to have a particular goal in mind to do this. These goals need to be further broken down into specific IDEA outcomes which the initiative will address. After you launch an initiative, you can measure the results by tracking data such as:

- Sales growth correlated to the diversity initiative.
- Revenue per employee (*segmenting the target group to understand the impact of the initiative*).
- Promotion rates (*for example, for a program that targets accelerated promotion for under-represented groups*).
- Job level representation
- Net promoter score

11. Employee Climate Surveys & Assessments – Climate surveys and climate assessments involve gathering information from employees with different perspectives and insights about diversity and equity experiences. It sheds light on what an organization is doing well with respect to IDEA and how it can do better. The surveys and assessments address attitudes and concerns that help the organization work with employees to instill positive changes.

12. IDEA Audit – This type of audit is a tool that utilizes data, research, and strategy

to understand the current state of IDEA efforts. The audits track short and long-term inclusion, diversity, equity, and access goals and actions within organizations and workplaces. IDEA audits are an integral step in ensuring that workplaces are taking the steps they need to move forward with initiatives, do not back-pedal or get burned on performative practices. Audits track the successes and challenges of initiatives, set measurable goals as health checks, and highlight areas of opportunity that might otherwise go unnoticed.

Continuous evaluation is all about implementing strategies that promote policy change, system reform and program delivery critical to removing barriers and increasing equitable opportunities to populations served. It is important to consistently assess whether investments are accomplishing stated equity goals. Organizations should be assessing equity progress at every turn and on an ongoing basis. Setting goals for the equity outcomes you are seeking, tracking results, measuring progress, and implementing needed course adjustments are critical to effectively doing this work.

Organizations should be assessing equity progress at every turn and on an ongoing basis.

Assign Accountability –

As “stewards of the public trust,” accountability for a nonprofit begins and ends with its Board of Directors. Particularly as it relates to IDEA initiatives, the nonprofit board needs to ensure that an individual and/or team is assigned to manage and monitor initiatives to see that established goals and objectives are being achieved.

- **Board of Directors** (Association and Chapter level) – Embed equity training into professional development for staff and board. Both equity training and professional development are necessary to pursue and achieve equity. All organization leaders must be aware of the tools, research, and resources to practice equity but must also assess their role in perpetuating or dismantling inequity in workplace policies, processes, practices, and programs they adopt.
- **Chief Equity Officer** – Establishing a point person responsible for creating and managing IDEA initiatives is essential for optimizing efforts related to making the workplace a fairer, more-equitable environment for all employees. Responsibilities of the job may include creating diversity networks to ensure all groups have a voice, creating positive action interventions to support under-represented groups, running training sessions, or even maintaining records and information systems. Having a Chief Equity Officer is one way to ensure a company transforms into a work culture where all employees and customers are protected, feel safe, given an equal chance, and are treated with dignity and respect.

STEP

5

- **IDEA Committee** – An inclusion, diversity, equity, and access committee is a task force of diverse staff members responsible for helping bring about the cultural, and possibly ethical, changes necessary for the organizational purpose while increasing cooperation, understanding, and dialogue among employees and stakeholders of diverse cultural, religious, socio-economic, racial, and ethnic, and experiential backgrounds. This committee advises leadership on IDEA matters in association with strategy and programming and serves as the voice of the workforce on IDEA concerns. Other tasks may include, managing the development of the departmental diversity and inclusion strategic plan; sharing and promoting diversity and inclusion best practices and models within and across departments; engaging and communicating regularly with staff on the status of the IDEA plan development; and spreading awareness about the issues related to diversity, equity, and inclusion.
- **Community Advisory Board (CAB)** – CABs are a temporary, ad-hoc committee composed of community members who share an identity, geography, history, language, culture, or other characteristic or experience who work closely with leadership to contribute community voice to the organization’s equity plan. The goal of the CAB is to recommend strategies, identify and curate diverse, equitable and inclusive opportunities for all.

- **Community Task Force** – CTFs are a temporary, ad-hoc committee composed of a range of interests and needs from the broader community. Task forces work by creating processes for looking at issues of race and color in a multi-ethnic community and providing meaningful interaction for committing themselves to seeking short-term and long-term solutions. Activities can involve creating and conducting focus groups for data collection, examining various interactive models for addressing issues of race and ethnicity, or formulating recommendations for action.
- **Community Engagement** - Ensuring that Resolution Washington programs, services and interventions bring along their respective stakeholders in the process, requires that community input and feedback is continuously incorporated. This will require an understanding of how the community wants to be engaged, the types of information they need, the modalities and opportunities for engaging them, and recognizing that the community is diverse and there will be no one-size fits all approach.

Recently, a new approach is emerging following recent public commitments from large companies to improve IDEA performance amid heightened public focus around systemic racism. A recent study of Fortune 500 companies shows companies creating an additional degree of accountability around IDEA performance by tying a quantified portion of executive incentives to pre-set and measurable goals that ladder up into these long-term commitments. This approach, when paired with fulsome disclosure of the goal determination process, has

merged as best practice for those seeking to tie DEI performance to executive pay.



Ensure Allyship –

Allyship as a diversity and inclusion tool in the workplace promotes equity for non-majority players. Each action may be small, but when combined they foster a company culture that's open and receptive to new ideas and constructive criticism.

Allyship in the workplace means using personal privilege to support colleagues from historically marginalized communities. Allies wield their influence to amplify the voices and elevate the employee experience of their underrepresented coworkers. A workplace ally builds partnerships that raise awareness, offer mentoring, and advocate on behalf of marginalized coworkers. These actions help those groups feel heard, valued, and respected.

Senior executives with the power to alter policies can support workplace culture by listening and learning. They should note who is not being included, and those whose voices carry the least weight. Senior executives have the clout to effect change among their peer group, who likely see them as more objective and authoritative than marginalized employees. Support must come from the top down and the bottom up. It starts with the desire to make the organization inclusive and equitable. Once leaders are more visible about their allyship, this creates a safe space for other leaders and colleagues to do the same.

Change takes place in different ways and is on-going. It is a lifetime process of learning. When people consider their own diversity, check their assumptions, ask about inclusion, and apply insights to their work, they can create change. The end result is that they become an ally and take action.

STEP

6

Employee Champions – An Inclusion, Diversity, Equity, and Access Champion (IDEA Champion) is a person within the organization that actively supports IDEA in the workplace. Quite simply an IDEA Champion turns talk into action. A, IDEA Champion is at the forefront of setting expectations and modeling what an inclusive, diverse, equitable, and accessible organization should look like. Individuals that choose to lead as IDEA Champions don't just talk about improving inclusion, diversity, equity, and access, they are making it happen every day through their personal and professional actions in the workplace.

Employee Resource Groups (aka Affinity Group) – ERGs may connect employees of similar ethnicities, sexual orientations, faiths, disabilities, and more. These affinity groups aim to provide peers with a safe space, enhance employee well-being, and foster a more inclusive workplace. The most effective of these groups help boost feelings of inclusion for traditionally underrepresented segments of workers, improve the attraction and retention of employees who identify with these segments, and increase representation of diverse talent in line with the organization's DEI strategy.

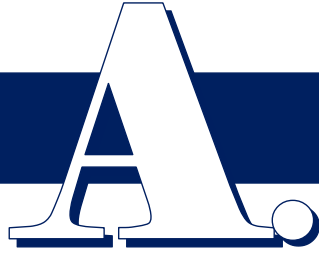
Research from McKinsey found that ERGs foster inclusion in several ways. The connections employees develop can help them feel like they're part of a community and reduce feelings of isolation. They also give a voice to groups that were traditionally underrepresented in the workforce. ERGs help with recruiting efforts by participating in talent attraction. The participation of ERG

members, for example, in diverse panels and recruiting events, shows potential employees that a welcoming community exists at the organization they are considering joining. ERGs work to build connections among employees, helping underrepresented parts of the workforce feel more engaged by working to change company policy and foster understanding between different cultures. ERGs support learning and development by offering formal and informal leadership opportunities and creating visibility for employees who are active. ERGs are most impactful when they provide a resource for leadership and decision-makers regarding staff/community issues, needs and policies.



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Equity Glossary

Able-ism | The belief that disabled individuals are inferior to non-disabled individuals, leading to discrimination toward and oppression of individuals with disabilities and physical differences.

Accessibility | The extent to which a facility is readily approachable and usable by individuals with disabilities, particularly such areas as the residence halls, classrooms, and public areas.

Acculturation | The general phenomenon of persons learning the nuances of or being initiated into a culture. It may also carry a negative connotation when referring to the attempt by dominant cultural groups to acculturate members of other cultural groups into the dominant culture in an assimilation fashion.

Adult-ism | Prejudiced thoughts and discriminatory actions against young people, in favor of the older person(s)

Age-ism | Prejudiced thoughts and discriminatory actions based on differences in age; usually that of younger persons against older.

A-Gender | Not identifying with any gender, the feeling of having no gender.

Agent | The perpetrator of oppression and/or discrimination; usually a member of the dominant, non-target identity group.

Ally | A person of one social identity group who stands up in support of members of another group. Typically, member of dominant group standing beside member(s) of targeted group; e.g., a male arguing for equal pay for women.

Androgyne | A person whose biological sex is not readily apparent, whether intentionally or unintentionally.

Androgynous | A person whose identity is between the two traditional genders.

Androgyny | A person who rejects gender roles entirely.

Androgynous | Someone who reflects an appearance that is both masculine and feminine, or who appears to be neither or both a male and a female.

Anti-Semitism | The fear or hatred of Jews, Judaism, and related symbols.

A-Sexuality | Little or no romantic, emotional and/or sexual attraction toward other persons. Asexuality could be described as non-sexual, but asexuality is different from celibacy, which is a choice to not engage in sexual behaviors with another person.

Assigned Sex | What a doctor determines to be your physical sex birth based on the appearance of one's primary sex characteristics.

Assimilation | A process by which outsiders (persons who are others by virtue of cultural heritage, gender, age, religious background, and so forth) are brought into, or made to take on the existing identity of the group into which they are being assimilated. The term has had a negative connotation in recent educational literature, imposing coercion, and a failure to recognize and value diversity. It is also understood as a survival technique for individuals or groups.

Bias | Prejudice; an inclination or preference, especially one that interferes with impartial judgment.

Bigotry | An unreasonable or irrational attachment to negative stereotypes and prejudices.

Bi-Phobia | The fear or hatred of homosexuality (and other non-heterosexual identities), and persons perceived to be bisexual.

Bi-Racial | A person who identifies as coming from two races. A person whose biological parents are of two different races.

Bi-Sexual | A romantic, sexual, or/and emotional attraction toward people of all sexes. A person who identifies as bisexual is understood to have attraction to male and female identified persons. However, it can also mean female attraction and non-binary, or other identifiers. It is not restricted to only CIS identifiers.

Cis-Gender | A person who identifies as the gender they were assigned at birth.

Cis-Sexism | Oppression based assumption that transgender identities and sex embodiments are less legitimate than cis-gender ones.

Class-ism | Prejudiced thoughts and discriminatory actions based on a difference in socioeconomic status, income, class; usually by upper classes against lower.

Colonization | The action or process of settling among and establishing control over the indigenous people of an area. The action of appropriating a place or domain for one's own use.

Color Blind | The belief in treating everyone "equally" by treating everyone the same; based on the presumption that differences are, by definition, bad, or problematic, and therefore best ignored (i.e., "I don't see race, gender, etc.").

Color-ism | A form of prejudice or discrimination in which people are treated differently based on the social meanings attached to skin color.

Co-Option | A process of appointing members to a group, or an act of absorbing or assimilating.

Co-Optation | Various processes by which members of the dominant cultures or groups assimilate members of target groups, reward them, and hold them up as models for other members of the target groups. Tokenism is a form of co-optation.

Conscious Bias (Explicit Bias) | Refers to the attitudes and beliefs we have about a person or group on a conscious level. Much of the time, these biases and their expressions arise as the direct result of a perceived threat. When people feel threatened, they are more likely to draw group boundaries to distinguish themselves from others.

Critical Race Theory | Critical race theory in education challenges the dominant discourse on race and racism as they relate to education by examining how educational theory, policy, and practice are used to subordinate certain racial and ethnic groups.

Culture | Culture is the pattern of daily life learned consciously and unconsciously by a group of people. These patterns can be seen in language, governing practices, arts, customs, holiday celebrations, food, religion, dating rituals, and clothing.

Cultural Appropriation | The adoption or theft of icons, rituals, aesthetic standards, and behavior from one culture or subculture by another. It is generally applied when the subject culture is a minority culture or somehow subordinate in social, political, economic, or military status to appropriating culture. This “appropriation” often occurs without any real understanding of why the original culture took part in these activities, often converting culturally significant artifacts, practices, and beliefs into “meaningless” pop-culture or giving them a significance that is completely different/less nuanced than they would originally have had.

Culturally Responsive Pedagogy | Culturally responsive pedagogy facilitates and supports the achievement of all students. In a culturally responsive classroom, reflective teaching and learning occur in a culturally supported, learner-centered context, whereby the strengths students bring to school are identified, nurtured, and utilized to promote student achievement.

D.A.C.A (Deferred Action for Childhood Arrivals) | An American immigration policy that allows some individuals who were brought to the United States without inspection as children to receive a renewable two-year period of deferred action from deportation and become eligible for a work permit in the U.S.

Drag Queen / King | A man or woman dressed as the opposite gender, usually for the purpose of performance or entertainment. Many times, overdone or outrageous and may present a “stereotyped image.”

Dialogue | "Communication that creates and recreates multiple understandings" (Wink, 1997). It is bi-directional, not zero-sum and may or may not end in agreement. It can be emotional and uncomfortable, but is safe, respectful and has greater understanding as its goal.

Disability | An impairment that may be cognitive, developmental, intellectual, mental, physical, sensory, or some combination of these. It substantially affects a person's life activities and may be present from birth or occur during a person's lifetime.

Discrimination | The denial of justice and fair treatment by both individuals and institutions in many areas, including employment, education, housing, banking, and political rights. Discrimination is an action that can follow prejudiced thinking.

Diversity | The wide variety of shared and different personal and group characteristics among human beings.

Domestic Partner | Either member of an unmarried, cohabiting, straight and same-sex couple that seeks benefits usually available only to spouses.

Dominant Culture | The cultural values, beliefs, and practices that are assumed to be the most common and influential within a given society.

Ethnicity | A social construct which divides individuals into smaller social groups based on characteristics such as a shared sense of group membership, values, behavioral patterns, language, political and economic interests, history, and ancestral geographical base.

Ethnocentricity | Considered by some to be an attitude that views one's own culture as superior. Others cast it as "seeing things from the point of view of one's own ethnic group" without the necessary connotation of superiority.

Euro-Centric | The inclination to consider European culture as normative. While the term does not imply an attitude of superiority (since all cultural groups have the initial right to understand their own culture as normative), most use the term with a clear awareness of the historic oppressiveness of Eurocentric tendencies in U.S and European society.

Equality | A situation in which all people within a specific society or isolated group have the same status in certain respects, including civil rights, freedom of speech, property rights and equal access to certain social goods and services.

Equity | Takes into consideration the fact that the social identifiers (race, gender, socioeconomic status, etc.) do, in fact, affect equality. In an equitable environment, an individual or a group would be given what was needed to give them equal advantage. This would not necessarily be equal to what others were receiving. Equity is an ideal and a goal, not a process. It ensures that everyone has the resources they need to succeed.

Feminism | The advocacy of women's rights on the ground of the equality of the sexes.

Femme | A person who expresses and/or identifies with femininity.

First Nation People | Individuals who identify as those who were the first people to live on the Western Hemisphere continent. People also identified as Native or Indigenous Americans.

Gay | A person who is emotionally, romantically, or sexually attracted to members of the same gender.

Gender | The socially constructed concepts of masculinity and femininity; the “appropriate” qualities accompanying biological sex.

Gender Bending | Dressing or behaving in such a way as to question the traditional feminine or masculine qualities assigned to articles of clothing, jewelry, mannerisms, activities, etc.

Gender Dysphoria (Gender Identity Disorder) | Significant, clinical distress caused when a person's assigned birth gender is not the same as the one with which they identify. The American Psychiatric Association's Diagnostic and Statistical Manual of Mental Disorders (DSM) consider Gender Identity Disorder as “intended to better characterize the experiences of affected children, adolescents, and adults.”

Gender Expression | External manifestations of gender, expressed through a person's name, pronouns, clothing, haircut, behavior, voice, and/or body characteristics.

Gender Fluid | A person who does not identify with a single fixed gender; of or relating to a person having or expressing a fluid or unfixed gender identity.

Gender Identity | Your internal sense of self; how you relate to your gender(s).

Gender Non-Conforming | A broad term referring to people who do not behave in a way that conforms to the traditional expectations of their gender, or whose gender expression does not fit into a category.

Gender Queer | Gender queer people typically reject notions of static categories of gender and embrace a fluidity of gender identity and often, though not always, sexual orientation. People who identify as “gender queer” may see themselves as both male or female aligned, neither male or female or as falling completely outside these categories.

Hate Crime | Hate crime legislation often defines a hate crime as a crime motivated by the actual or perceived race, color, religion, national origin, ethnicity, gender, disability, or sexual orientation of any person.

Hermaphrodite | An individual having the reproductive organs and many of the secondary sex characteristics of both sexes. (Not a preferred term. See: Intersex)

Hetero-sexism | The presumption that everyone is, and should be, heterosexual.

Heterosexuality | An enduring romantic, emotional and/or sexual attraction toward people of the other sex. The term “straight” is commonly used to refer to heterosexual people.

Heterosexual | Sexually attracted to members of other or the opposite sex.

Homophobia | The fear or hatred of homosexuality (and other non-heterosexual identities), and persons perceived to be gay or lesbian.

Homosexual | Sexually attracted to members of the same sex. (Not a preferred term. See: Gay, Lesbian)

Inclusion | Authentically bringing traditionally excluded individuals and/or groups into processes, activities, and decision/policy making in a way that shares power.

Inclusive Language | Refers to non-sexist language or language that “includes” all persons in its references. For example, “a writer needs to proofread his work” excludes females due to the masculine reference of the pronoun. Likewise, “a nurse must disinfect her hands” is exclusive of males and stereotypes nurses as females.

In-Group Bias (Favoritism) | The tendency for groups to “favor” themselves by rewarding group members economically, socially, psychologically, and emotionally in order to uplift one group over another.

Institutional Racism | It is widely accepted that racism is, by definition, institutional. Institutions have greater power to reward and penalize. They reward by providing career opportunities for some people and foreclosing them for others. They reward as well by the way social goods are distributed, by deciding who receives institutional benefits.

Intercultural Competency | A process of learning about and becoming allies with people from other cultures, thereby broadening our own understanding and ability to participate in a multicultural process. The key element to becoming more culturally competent is respect for the ways that others live in and organize the world and an openness to learn from them.

Internalized Homophobia | Among lesbians, gay men, and bisexuals, internalized sexual stigma (also called internalized homophobia) refers to the personal acceptance and endorsement of sexual stigma as part of the individual's value system and self-concept. It is the counterpart to sexual prejudice among heterosexuals.

Internalized Oppression | The process whereby individuals in the target group make oppression internal and personal by coming to believe that the lies, prejudices, and stereotypes about them are true. Members of target groups exhibit internalized oppression when they alter their attitudes, behaviors, speech, and self-confidence to reflect the stereotypes and norms of the dominant group. Internalized oppression can create low self-esteem, self-doubt, and even self-loathing. It can also be projected outward as fear, criticism, and distrust of members of one's target group.

Internalized Racism | When individuals from targeted racial groups internalize racist beliefs about themselves or members of their racial group. Examples include using creams to lighten one's skin, believing that white leaders are inherently more competent, asserting that individuals of color are not as intelligent as white individuals, believing that racial inequality is the result of individuals of color not raising themselves up "by their bootstraps". (Jackson & Hardiman, 1997)

Intersectionality | An approach largely advanced by women of color, arguing that classifications such as gender, race, class, and others cannot be examined in isolation from one another; they interact and intersect in individuals' lives, in society, in social systems, and are mutually constitutive. Exposing [one's] multiple identities can help clarify the ways in which a person can simultaneously experience privilege and oppression. For example, a Black woman in America does not experience gender inequalities in exactly the same way as a white woman, nor racial oppression identical to that experienced by a Black man. Each race and gender intersection produces a qualitatively distinct life.

Intersex | An umbrella term describing people born with reproductive or sexual anatomy and/or chromosome pattern that can't be classified as typically male or female.

ism | A social phenomenon and psychological state where prejudice is accompanied by the power to systemically enact it.

Lesbian | A woman who is sexually attracted to other women. Also used as an adjective describing such women.

LGBTQIA+ | Acronym encompassing the diverse groups of lesbians, gay, bisexual, transgender populations, and allies and/or lesbian, gay, bisexual, and transgender alliances/associations.

Look-ism | Discrimination or prejudice based upon an individual's appearance.

Marginalized | Excluded, ignored, or relegated to the outer edge of a group/society/community.

Micro-Aggressions | Commonplace daily verbal, behavioral, or environmental indignities, whether intentional or unintentional, that communicate hostile, derogatory racial slights. These messages may be sent verbally, ("You speak good English"), non-verbally (clutching one's purse more tightly around people from certain race/ethnicity) or environmentally (symbols like the

confederate flag or using Native American mascots). Such communications are usually outside the level of conscious awareness of perpetrators.

Micro-Insults | Verbal and nonverbal communications that subtly convey rudeness and insensitivity and demean a person's racial heritage or identity. An example is an employee who asks a colleague of color how she got her job, implying she may have landed it through an affirmative action or quota system.

Micro-Invalidation | Communications that subtly exclude, negate, or nullify the thoughts, feelings, or experiential reality of a person of color. For instance, white individuals often ask Asian-Americans where they were born, conveying the message that they are perpetual foreigners in their own land.

Model Minority | Stereotypical trope most associated with Asian Americans that their cultural values allow them to, more easily, assimilate, integrate, and be accepted by white culture more easily.

Mono-Racial | To be of only one race (composed of or involving members of one race only; (of a person) not of mixed race.)

Multicultural Competency | A process of learning about and becoming allies with people from other cultures, thereby broadening our own understanding and ability to participate in a multicultural process. The key element to becoming more culturally competent is respect for the ways that others live in and organize the world and an openness to learn from them.

Multicultural Feminism | The advocacy of women's rights on the ground of the equality of the sexes within cultural/ethnic groups within a society.

Multi-Ethnic | An individual that comes from more than one ethnicity. An individual whose parents are born with more than one ethnicity.

Multiplicity | The quality of having multiple, simultaneous social identities (e.g., being male and Buddhist and working-class).

Multi-Racial | An individual that comes from more than one race.

Naming | When one articulates a thought that traditionally has not been discussed.

National Origin | The political state from which an individual hails; may or may not be the same as that person's current location or citizenship.

Neo-Liberalism | A substantial subjugation and marginalization of policies and practices informed by the values of social justice and equity.

Non-Binary/Gender Queer/Gender Variant | Terms used by some people who experience their gender identity and/or gender expression as falling outside the categories of man and woman.

Non-White | Used at times to reference all persons or groups outside of the white culture, often in the clear consciousness that white culture should be seen as an alternative to various non-white cultures and not as normative.

Oppression | Results from the use of institutional power and privilege where one person or group benefits at the expense of another. Oppression is the use of power and the effects of domination.

Pan-Sexual | A term referring to the potential for sexual attractions or romantic love toward people of all gender identities and biological sexes. The concept of pan-sexuality deliberately rejects the gender binary and derives its origin from the transgender movement.

Persons of Color | A collective term for men and women of Asian, African, Latin, and Native American backgrounds; as opposed to the collective "White" for those of European ancestry.

Personal Identity | Our identities as individuals include our personal characteristics, history, personality, name, and other characteristics that make us unique and different from other individuals.

Prejudice | A prejudgment or preconceived opinion, feeling, or belief, usually negative, often based on stereotypes, that includes feelings such as dislike or contempt and is often enacted as discrimination or other negative behavior; OR, a set of negative personal beliefs about a social group that leads individuals to prejudge individuals from that group or the group in general, regardless of individual differences among members of that group.

Privilege | Unearned access to resources (social power) only readily available to some individuals because of their social group.

Privileged Group Member | A member of an advantaged social group privileged by birth or acquisition, i.e., Whites, men, owning class, upper-middle-class, heterosexuals, gentiles, Christians, non-disabled individuals.

Post-Racial | A theoretical term to describe an environment free from racial preference, discrimination, and prejudice.

Queer | An umbrella term that can refer to anyone who transgresses society's view of gender or sexuality. The definition indeterminacy of the word Queer, its elasticity, is one of its constituent characteristics: "A zone of possibilities."

Questioning | A term used to refer to an individual who is uncertain of their sexual orientation or identity.



Race | A social construct that artificially divides individuals into distinct groups based on characteristics such as physical appearance (particularly skin color), ancestral heritage, cultural affiliation or history, ethnic classification, and/or the social, economic, and political needs of a society at a given period of time. Scientists agree that there is no biological or genetic basis for racial categories.

Racial Equity | Racial equity is the condition that would be achieved if one's racial identity is no longer predicted, in a statistical sense, how one fares. When this term is used, the term may imply that racial equity is one part of racial justice, and thus also includes work to address the root causes of inequities, not just their manifestations. This includes the elimination of policies, practices, attitudes, and cultural messages that reinforce differential outcomes by race or fail to eliminate them.

Racial Profiling | The use of race or ethnicity as grounds for suspecting someone of having committed an offense.

Racism | Prejudiced thoughts and discriminatory actions based on a difference in race/ethnicity; usually by white/European descent groups against persons of color. Racism is racial prejudice plus power. It is the intentional or unintentional use of power to isolate, separate and exploit others. The use of power is based on a belief in superior origin, the identity of supposed racial characteristics. Racism confers certain privileges on and defends the dominant group, which in turn, sustains and perpetuates racism.

Rainbow Flag | The Rainbow Freedom Flag was designed in 1978 by Gilbert Baker to designate the great diversity of the LGBTIQ community. It has been recognized by the International Flag Makers Association as the official flag of the LGBTIQ civil rights movement.

Resilience | The ability to recover from some shock, trauma, or disturbance.

Safe Space | Refers to an environment in which everyone feels comfortable expressing themselves and participating fully, without fear of attack, ridicule, or denial of experience.

Safer Space | A supportive, non-threatening environment that encourages open-mindedness, respect, a willingness to learn from others, as well as physical and mental safety.

Saliency | The quality of a group identity in which an individual is more conscious and plays a larger role in that individual's day-to-day life; for example, a man's awareness of his "maleness" in an elevator with only women.

Scapegoating | The action of blaming an individual or group for something when there is no one person or group responsible for the problem. It targets another person or group as responsible for problems in society because of that person's group identity.

Sexism | Prejudiced thoughts and discriminatory actions based on a difference in sex/gender; usually by men against women.

Sexual Orientation | One's natural preference in sexual partners; examples include homosexuality, heterosexuality, or bisexuality. Sexual orientation is not a choice, it is determined by a complex interaction of biological, genetic, and environmental factors.

Social Identity | Involves the ways in which one characterizes oneself, the affinities one has with other people, 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.

Social Identity Development | The stages or phases that a person's group identity follows as it matures or develops.

Social Justice | A broad term for action intended to create genuine equality, fairness, and respect among peoples.

Social Oppression | This condition exists when one social group, whether knowingly or unconsciously, exploits another group for its own benefit.

Social Self-Esteem | The degree of positive/negative evaluation an individual holds about their particular situation regarding their social identities.

System of Oppression | Conscious and unconscious, non-random, and organized harassment, discrimination, exploitation, discrimination, prejudice, and other forms of unequal treatment that impact different groups.

Tolerance | Acceptance, and open-mindedness to different practices, attitudes, and cultures; does not necessarily mean agreement with the differences.

Token-ism | Hiring or seeking to have representation such as a few women and/or racial or ethnic minority persons to appear inclusive while remaining mono-cultural.

Transgender/Trans | An umbrella term for people whose gender identity differs from the sex they were assigned at birth. The term transgender is not indicative of gender expression, sexual orientation, hormonal makeup, physical anatomy, or how one is perceived in daily life.

Trans Misogyny | The negative attitudes, expressed through cultural hate, individual and state violence, and discrimination directed toward trans women and transfeminine people.

Transphobia | Fear or hatred of transgender people; transphobia is manifested in several ways, including violence, harassment, and discrimination. This phobia can exist in LGB and straight communities.

Transexual | One who identifies as a gender other than that of their biological sex.

Two Spirit | An umbrella pan-Native American term describing gender identity, gender expression, and/or sexual orientation.

Unconscious Bias (Implicit Bias) | Social stereotypes about certain groups of people that individuals form outside their own conscious awareness. Everyone holds unconscious beliefs about various social and identity groups, and these biases stem from one's tendency to organize social worlds by categorizing.

Undocumented | A foreign-born person living in the United States without legal citizenship status.

Whiteness | A broad social construction that embraces the white culture, history, ideology, racialization, expressions, and economic, experiences, epistemology, and emotions and behaviors and nonetheless reaps material, political, economic, and structural benefits for those socially deemed white.

White Fragility | Discomfort and defensiveness on the part of a white person when confronted by information about racial inequality and injustice.

White Privilege | Refers to the unquestioned and unearned set of advantages, entitlements, benefits, and choices bestowed on people solely because they are white. Generally white people who experience such privilege do so without being conscious of it.

- 1) **Interpersonal White Privilege** | Behavior between people that consciously or unconsciously reflects white superiority or entitlement.
- 2) **Cultural White Privilege** | A set of dominant cultural assumptions about what is good, normal, or appropriate that reflects Western European white world views and dismisses or demonizes other world views.
- 3) **Institutional White Privilege** | Policies, practices, and behaviors of institutions—such as schools, banks, non-profits, or the Supreme Court—that have the effect of maintaining or increasing accumulated advantages for those groups currently defined as white and maintaining or increasing disadvantages for those racial or ethnic groups not defined as white. The ability of institutions to survive and thrive even when their policies, practices and behaviors maintain, expand, or fail to redress accumulated disadvantages and/or inequitable outcomes for people of color.

White Supremacy | The idea (ideology) that white people and the ideas, thoughts, beliefs, and actions of white people are superior to People of Color and their ideas, thoughts, beliefs, and actions.

Xenophobia | Hatred or fear of foreigners/strangers or of their politics or culture.

B Training & Awareness Resources

Online Tools

- Online Racial Equity Tools: <https://www.racialequitytools.org/>

Assessment

- *Harvard Implicit Association Test*
<https://implicit.harvard.edu/implicit/selectatouchtest.html>

Videos

- *How to overcome bias? Walk boldly toward them | Vernā Myers | TEDxBeconStreet.*
https://www.ted.com/talks/verna_myers_how_to_overcome_our_biases_walk_boldly_toward_them/discussion
- *Are you biased? I am | Kristen Pressner | TEDxBasel*
https://www.youtube.com/watch?v=Bq_xYSOZrqU
- *Should you trust your first impression? | Peter Mende-Siedlecki | TEDx*
<https://ed.ted.com/lessons/should-you-trust-your-first-impression-peter-mende-siedlecki>
- *Unconscious bias: Stereotypical hiring practices | Gail Tolstoi-Miller | TEDxLincolnSquare*
<https://www.youtube.com/watch?v=QCFb4BiDDcE>
- *How Do You See Me | SoulPancake | YouTube series*
https://www.youtube.com/playlist?list=PLzvRx_johoA8ja2oM5MkABrJBHFxHXr-G
- *White Men: Time to Discover Your Cultural Blind Spots | Michael Welp | TEDxBend*
<https://www.youtube.com/watch?v=rR5zDijUrfk>
- *Cultural Humility | Juliana Mosley, Ph.D. | TEDxWestChester*
https://www.youtube.com/watch?v=Ww_ml21L7Ns
- *Intersectionality | Social Inequality | MCAT | Khan Academy*
<https://www.youtube.com/watch?v=n2kUpKP18z8>
- *Kimberlé Crenshaw Discusses 'Intersectional Feminism' | Lafayette College | YouTube*
https://www.youtube.com/watch?v=ROWquxC_Gxc

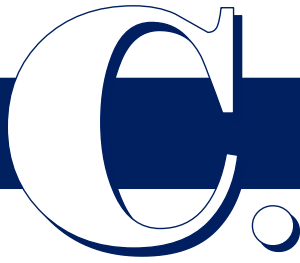
- “What is intersectionality?” | Commissioned and produced by Professor Peter Hopkins, Newcastle University | YouTube <https://www.youtube.com/watch?v=O1isIM0ytkE>
- Black Lives Matter explained: The history of a movement | Channel 4 News | YouTube <https://www.youtube.com/watch?v=YG8GjLbbvs>
- Deconstructing White Privilege with Dr. Robin DiAngelo | YouTube <https://www.youtube.com/watch?v=Dwlx3KQer54>
- “Systemic Racism Explained” | act.tv. Systemic racism affects every area of life in the U.S., https://www.youtube.com/watch?v=YrHIQIO_bdQ
- “The myth of race, debunked in 3 minutes” | VOX <https://www.youtube.com/watch?v=VnfKaffCZ7U>

Articles/Reports/Papers Resources

- “Generational Differences in the Workplace” (infographic) | Purdue Global University <https://www.purdueglobal.edu/education-partnerships/generational-workforce-differences-infographic/>
- “Leading Multiple Generations In Today's Workforce” | Forbes.com <https://www.forbes.com/sites/soulaimagourani/2019/04/25/leading-multiple-generations-in-todays-workforce/#743944454636>
- “Why We Should Embrace Generational Differences in the Workplace” | AIHR Digital <https://www.digitalhrtech.com/generational-differences-in-the-workplace/>
- “Blindspot: Hidden Biases of Good People” | Mahzarin R. Banaji and Anthony G. Greenwald | Washington Post https://www.washingtonpost.com/opinions/blindspot-hidden-biases-of-good-people-by-mahzarin-r-banaji-and-anthony-g-greenwald/2013/02/08/4c42d6b8-6a1b-11e2-ada3-d86a4806d5ee_story.html
- White Paper: “Leadership Pitfalls & Insights into Unconscious Bias” | Michael Brainard, Ph.D. <http://www.brainardstrategy.com/unconscious-bias-whitepaper/#:~:text=As%20leaders%2C%20unconscious%20bias%20impacts,of%20diversity%20and%20inclusion%20thinkers>
- “Think you’re not biased? Think again” | Science News for Students <https://www.sciencenewsforstudents.org/article/think-youre-not-biased-think-again>

- “7 Leadership Lessons Men Can Learn from Women” | Harvard Business Review <https://hbr.org/2020/04/7-leadership-lessons-men-can-learn-from-women>
- “Women in the Workplace 2019” | McKinsey & Company <https://www.mckinsey.com/featured-insights/gender-equality/women-in-the-workplace-2019>
- “Facing the Gender Gap in the Workplace” | Business News Daily <https://www.businessnewsdaily.com/4178-gender-gap-workplace.html>
- “Top 5 Issues Fueling Gender Equity in the Workplace” | AS YOU SOW <https://www.asyouow.org/blog/gender-equality-workplace-issues>
- “Advocating for LGBTQ Equality in Your Workplace” | Human Rights Campaign <https://www.hrc.org/resources/advocating-for-lgbt-equality-in-your-workplace>
- “LGBTQ Inclusion: Good for Families, Communities and the Economy” | PolicyLink <https://www.policylink.org/resources-tools/casey-equal-voice-series-LGBTQ-inclusion>
- PowerPoint: “Best Practices for Building LGBT-Inclusive Workplace” | Littler https://www.littler.com/files/Best_Practices_for_Building_a_LGBT-Inclusive_Workplace.pdf
- “What Do the Letters Mean in LGBTQIA+?” | The Active Times <https://www.theactivetimes.com/what-letters-mean-lgbtqia>
- “26 simple charts to show friends and family who aren't convinced racism is still a problem in America” | Business Insider <https://www.businessinsider.com/us-systemic-racism-in-charts-graphs-data-2020-6#the-aggregate-wealth-white-households-have-held-has-historically-far-outstripped-that-held-by-the-black-community-and-while-it-has-increased-for-white-people-since-the-1980s-its-remained-stagnant-for-black-people-8>
- “Americans See Advantages and Challenges in Country’s Growing Racial and Ethnic Diversity” | Pew Research Center <https://www.pewsocialtrends.org/2019/05/08/americans-see-advantages-and-challenges-in-countrys-growing-racial-and-ethnic-diversity/>
- “How to have more productive conversations about race in the workplace” | Quartz <https://qz.com/work/1867066/how-to-have-productive-conversations-about-race-at-the-office/>
- “Study: The Social Psychology Behind White Biases Against Black Natural Hair” | DiversityInc <https://www.diversityinc.com/study-social-psychology-behind-white-biases-black-natural-hair/>

- “Policy Matters: Poverty and Race Through a Belongingness Lens” by John A. Powell | IssueLab
<https://www.issuelab.org/resource/policymatters-poverty-and-race-through-a-belongingness-lens.html>
- “What's the difference between race and ethnicity?” | Live Science
<https://www.livescience.com/difference-between-race-ethnicity.html>
- “10 Books to Help You Foster A More Diverse and Inclusive Workplace” | Forbes.com
<https://www.forbes.com/sites/janicegassam/2019/08/25/10-books-to-help-you-foster-a-more-diverse-and-inclusive-workplace/#6942ffbc220c>
- “3 Requirements for a Diverse and Inclusive Culture” | Gallup.com
<https://www.gallup.com/workplace/242138/requirements-diverse-inclusive-culture.aspx>
- “Driving Diversity and Inclusion: The Role for Chairs and the CEOs” | Harvard Law School Forum on Corporate Governance
<https://corpgov.law.harvard.edu/2019/04/03/driving-diversity-and-inclusion-the-role-for-chairs-and-ceos/>
- “Eight Steps To Start Or Grow A Diversity And Inclusion Initiative” | Forbes.com
<https://www.forbes.com/sites/sheilacallaham/2019/08/18/eight-steps-to-start-or-grow-a-diversity-and-inclusion-initiative/#21cba9086b17>
- “Repairing the pipeline: Perspectives on diversity and inclusion in IT” | Deloitte
<https://www2.deloitte.com/us/en/insights/focus/cio-insider-business-insights/perspectives-on-gender-diversity-and-inclusion.html>
- “The diversity and inclusion revolution: Eight powerful truths” | Deloitte Review, issue 22
<https://www2.deloitte.com/us/en/insights/deloitte-review/issue-22/diversity-and-inclusion-at-work-eight-powerful-truths.html>
- “One proven way to boost software quality is to increase your QA team’s diversity” | Michael W. Cooper, Head of Quality Engineering, Transamerica
<https://techbeacon.com/app-dev-testing/one-proven-way-boost-software-quality-increase-your-qa-teams-diversity>
- White Paper: “Building an Inclusive Culture in a Diverse World” | Schneider Electric
https://www.se.com/ww/en/download/document/DI_White_Paper/
- “Why we need to end the culture of ‘Cultural Fit’” | Nonprofit AF
<https://nonprofitaf.com/2017/07/why-we-need-to-end-the-culture-of-cultural-fit/>



Implementation Plan Examples

- “Sample Diversity Plan” | Higher Logic <https://higherlogicdownload.s3.amazonaws.com/ASTC/a6c0f3de-e0b1-4198-8ab7-01cee4a55b00/UploadedImages/Sample-Diversity-Plan.pdf>
- “Sample Diversity Action Plan” | Sustainability Network <https://sustainabilitynetwork.ca/wp-content/uploads/2013/11/Sample-Diversity-Action-Plan.pdf>
- “Diversity And Inclusion: A Complete Guide For HR Professionals” | Ideal.com <https://ideal.com/diversity-and-inclusion/>
- “From Awake to Woke to Work: Building a Race Equity Culture” | Equity in the Center <https://www.equityinthecenter.org/wp-content/uploads/2019/04/Equity-in-Center-Awake-Woke-Work-2019-final-1.pdf>
- “Diversity and Inclusion Initiative: A Step-By-Step Guide” | TSNE MissionWorks <https://www.tsne.org/diversity-and-inclusion-initiative-step-step-guide>
- “Framework for Inclusion & Equity” | Grand Valley State University https://www.gvsu.edu/cms4/asset/8764E037-BDEC-7DDD-33FCF0A5048125AB/gv-inclusionbooklet-v3_for_website_3-18-2016.pdf
- “How-to-Guide: How to Develop a Diversity and Inclusion Initiative” | SHRM <https://www.shrm.org/resourcesandtools/tools-and-samples/how-to-guides/pages/how-to-develop-a-diversity-and-inclusion-initiative.aspx>
- “Using a DEI Road Map: How To Guide” | Science Council <http://sciencecouncil.org/web/wp-content/uploads/2015/12/Using-the-DEI-Roadmap-A-How-To-Guide-August-2014.pdf>
- “Diversity Report 2018 – 2019” | Axiom Law https://go.axiomlaw.com/hubfs/Downloadable%20Marketing%20Content/Diversity%20Report_08.20.pdf?hsLang=en
- “Equality Report” | Salesforce <https://www.salesforce.com/company/equality/>

D Equity Lens Worksheets

The purpose of equity lens worksheets is not merely to “fill in the blanks” but to produce a worksheet applicable to the specific practices and processes most likely to yield equitable outcomes within your organization. Eliciting feedback from staff, volunteers, board members donors, community members, stakeholders, partners and/or vendors that interact with your organization is critical to achieving an interrogative query most pertinent to your specific operations.

An organization will need to look at each of their program’s/service’s, policies, practices, and procedures (whether written or implied) to source out what is or might contribute to inequitable outcomes. The worksheets are simply to organize thoughts and document the thoroughness of your inquiry. This will take time and require a series of conversations with a variety of groups to arrive at the relevant questions to ask to uncover, expose, and root out bias and/or the potential for bias.

A few examples of worksheets follow. The intent is not to copy and answer rote questions but to question your own practices, policies, processes, and procedures and determine if the questions being asked in the worksheet examples are the best questions sufficient to your situation. It is the analysis and inquiry process that is key, NOT the format of the worksheets.

You may find that the questions in the examples are irrelevant and require you to draft your own questions. Again, the worksheets are simply a jumping off point to help tailor your own customized inquiries. It is the inquiry and analysis that is key, NOT the format of the worksheets.

Dismantling barriers to equity requires not only the capacity to think systemically, it demands strategies that move away from historic practices that sustain patterns of advantage toward the intentional implementation of equitable procedures for change.

Equity worksheets serve as a reminder that race-neutral policies will preserve the status quo as well as the unintended impact of color-blind efforts founded on good intentions. Ultimately, an organization must collectively acknowledge that a color conscious approach leads to the creation of inclusion because it commits time to racially-conscious strategies that anticipate the complex challenges to be faced.

These worksheets along with the toolkit serves as a guide to move away from conventional systems toward forward-thinking strategies that infuse organizations and with the innovation, creativity and broader perspectives that reside in diversity.

COMMUNICATIONS

When we apply equity and inclusion to all internal and external communications, we take action to ensure that historically excluded groups are heard, and everyone is informed.

1. Have we considered all possible audiences? Who has been historically excluded?
2. What specific communication strategies ensure historically excluded groups and/or internally excluded groups are heard and reached? (i.e.: working with community leaders, non-traditional news outlets, community newspapers, internal staff meetings, etc.)
3. How do the messages we are communicating foster inclusion, respect, dignity?
4. Are the messages we communicate inclusive, respectful, truthful, and equitable (both in tone and language) across all audiences?
5. Are there concepts or terms that may be culturally specific and need to be changed to make them more accessible?
6. Is the medium easily accessible and understood by the full diversity of our audience? (i.e.: plain language, voice mail, online, print, graphics, multiple languages, etc.)
7. Have we considered what populations may be missed by only using certain methods? (i.e.: email, social media) Do we use successful approaches?
8. Have we considered if there is a budget or alternative resources for translation services?
9. Do images represent the full diversity of employees? Ask...
 - Do they capture the diversity within specific communities of people?
 - Will the people portrayed in the images relate to and feel included in the way they are represented?
 - Is everyone portrayed in positive images that promote equity and break stereotypes?
 - Consider: Who is active, passive, at center, who is serving, who is being served

Are the people most impacted (internally/externally) informed meaningfully and included in discussions and decisions? If so, how?

What policies or practices (formal or implied) contribute to exclusion?

What are you already doing to promote and exercise inclusion?

Who is accountable for making changes that ensure inclusion?

How does our organization hold accountability to change practices and procedures?

Have we considered impact on excluded groups, such as:

- Specific Internal Departments/Teams/Staff
- Women
- BIPOC Groups
- Older Adults / Youth
- LGBTQIA+
- Immigrants & Refugees
- Minority Religious Group
- People who are differently-abled
- People in lower socio-economic demographics
- Who else?

DONOR ENGAGEMENT

When we welcome the diversity of perspectives of supporters, staff and community, we take action to ensure everyone benefits.

1. What approaches and outreach will help to ensure that those who need to be engaged are able to participate fully? How can we create opportunities for people least likely to be heard to ensure their perspectives and concerns are shared? (i.e.: focus groups, online surveys, anonymous feedback)
2. Is our team representative of the diversity of the population we are engaging? What steps can we take to ensure we are inclusive of diverse perspectives?
3. Which employees, groups or community groups with experience in these specific communities can help us conduct outreach? Are we compensating these outreach partners?
4. Is there a history – between the organization and communities or between communities – that we need to consider? If trauma exists, how will we address it? How will we ensure everyone is heard?
5. Is the language we use in our promotional materials and communications strategy easily understood by diverse audiences? How will we know?
6. What steps can we take to remove barriers to our presence where community gathers for full participation? (i.e.: safety measures, multiple formats, avoid religious & cultural holidays)
7. Is the environment welcoming to participants who may be reluctant to share their views? If not what can we do to change this? Does the pace, format and language of engagement accommodate participants for whom speaking up may be new?
8. Are the insights from groups who face systemic barriers and inequities reflected in reports and final documents?
9. How will we demonstrate accountability and commit to report back the findings to the full diversity of people involved in the engagement?

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RECRUITING & HIRING

When we integrate equity and inclusion into our selection and hiring practices, we take action to increase diverse skills and perspective throughout the organization, from our staff to our board and to our volunteers.

1. Do staff, board, volunteers, instructors – whether full time, part-time or temporary – reflect our values of diversity? Who is under-represented?
2. What knowledge, skills, experience, and diversity would enhance our organization’s capacity to be more relevant?
3. Do role requirements and/or selection criteria unnecessarily limit who would qualify to be considered for staff or board positions?
4. Have we considered where best to post employment opportunities to ensure that the widest diversity of people are able to access it?
5. Have we considered ways to broaden our staff/board candidate pool to historically excluded groups? Do we encourage staff, board, and community partners to help with outreach to help broaden the staff/board applicant pool from diverse groups?
6. Do our subcontractors, consultants, vendors and suppliers reflect our values of diversity?
7. How do we ensure interview panels are composed of individuals who bring diverse backgrounds and experiences relevant to the position?
8. Have we considered ways to reduce barriers in the interview process to make it more welcoming and friendly? (providing copy of interview questions)
9. Do we consider that people from specific backgrounds may present interview behaviors that don’t match our biases but still have the skillset to be top-notch staff/board candidates?
10. What checks and balances do we have in place to counter unconscious or undisclosed biases in recruiting, selecting and hiring?
11. Do we ask specific DEIA questions to ensure the values of potential staff, board, volunteer, and instructor candidates align with our DEIA values?

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WORKING WITH PEOPLE

When we treat people with care, dignity, and respect, we are taking action to create a welcoming harmonious workplace and inclusive organizational culture.

1. When we interact with staff, board, volunteers, instructors, guests, do we check our own assumption and biases? Ask...
 - Do I hold assumptions about people that get in the way of how I work with them? If so, what am I doing to counter this?
 - Do I avoid stereotypes and biases so that I can see the individual for who they really are?
 - Am I able to respect our differences and yet recognize what we have in common?
 - Do I recognize other's contributions?
 - Do I lead by example?
2. Am I paying attention to those who are not expressing their ideas?
3. How do I encourage feedback and full participation from everyone?
4. Am I raising issues in a way that encourages positive dialogue? Do I consciously make an effort to consider how my words, and/or tone of voice may be perceived? What do I do to ensure my interactions remain respectful and considerate?
5. Do I consider potential barriers in each situation, and work to minimize them (i.e.: language, gender or sexual discrimination, prejudice) If I am not sure what barriers exist, do I ask my colleagues or the people we serve?
6. Do I discourage ALL jokes, insults, and negative comments that may be offensive to people? What are the consequences for staff, board, volunteers, instructors, donors, vendors, suppliers or guests who engage in this behavior? Are consequences the same or is there a "double standard"?
7. Do I recognize and build on the strengths and assets of all individuals?
8. Are there procedures, policies, and practices in place that limit my capacity to be inclusive? Are there others who support my capacity to be inclusive? What action can I take to address this or bring awareness to the supportive policies?

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LEADING & SUPERVISING

When we become change agents for equity and inclusion in the way we lead, we take action to create a model that utilizes everyone's diverse talents and skills.

1. What steps do we take to create a respectful and inclusive environment? Ask...
 - Do I communicate clearly to staff, board, instructors and volunteers that inappropriate behavior such as offensive jokes and derogatory or negative comments are not acceptable?
 - How can I actively gather input and ideas from staff or volunteers from diverse perspectives?
 - How can I encourage staff, board, volunteers and instructors to contribute positively in creating an inclusive culture?
 - Do I lead by example?
2. Do we utilize support systems for staff, board, or volunteers who have been harassed, treated in disrespectful manner, or discriminated against by other staff, board members, volunteers or stakeholders?
3. Are there policies, procedures and/or practices, and attitudes that unintentionally prevent some people from fully engaging in programs, events or projects? (i.e.: conflicts with religious holidays or family obligations; workload distribution) What alternatives are possible?
4. Are policies and benefits equitable across all team members?
5. Is everyone associated with our organization (i.e.: staff, board, volunteers, instructors, donors, vendors, suppliers, subcontractors, consultants) aware of our commitments to equity and inclusion? How do we ensure this awareness?
6. Is equity and inclusion criteria incorporated into our staff review process and candidates being evaluated for promotions, management or instructor positions? If not, how might we include it?
7. Do direct reports have an opportunity to weigh in on their supervisor's evaluation?

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TRAINING

When we apply equity and inclusion to all stages of the onboarding and training process, we take action to create an environment where everyone is valued and can contribute.

1. Do we include equity and inclusion requirements when planning or staffing for internal and external instructors (i.e.: "able to reduce biases and work respectfully with people across diversity")
2. Do we include equity and inclusion requirement in our procurement documents when sourcing trainers/instructors?
3. Do we prioritize recruiting trainers/instructors from diverse backgrounds so they reflect the communities we serve?
4. Will the learning objectives be designed to influence participants' awareness and consideration of individuals and communities from diverse backgrounds?
5. Will participants develop competency and skills to work sensitively and effectively with individuals from diverse backgrounds?
6. Are all participants required to fully participate in training programs? Is specific outreach required to include them? Are barriers addressed. (i.e.: language, location, transportation, religious or culturally appropriate accommodations)
7. Have we integrated the diverse perspectives of people who have specific equity concerns or needs even if they are not obvious? (i.e.: LGBTQIA+, dietary, auditory, language preferences)
8. Is the program content sensitive to the experience of participants who may have experienced trauma and/or injustices? How do we vet programs for this level of sensitivity?
9. In the training/program evaluation, do we ask whether there were any barriers to participation or whether they found the instructor to be inclusive of the diversity of the participants.
10. Are there cost barriers for some and how do we balance that with our own financial health?

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- Who else?

STRATEGIC PLANNING

When we apply a vision of equity and inclusion to our planning, we take action to create an inclusive organization, programs, and services for everyone.

1. How does our strategic planning process promote equity and inclusion? Are staff, board, stakeholders involved throughout the process?
2. Do the long-term goals we are defining reflect equity and inclusion?
3. What are the current demographic trends which the organization or departmental strategic plans need to align with or address?
4. What equity issues are currently being raised by staff, board, volunteers, stakeholders in relation to our plans?
5. What are the costs of not taking demographic trends and equity issues into account? What are the benefits?
6. Do the organization and departmental strategic objectives and initiatives reflect a broad vision of equity and inclusion? How can it be strengthened?
7. What human and financial resources are required to achieve the equity and inclusion goals in our plan?
8. How do the performance measures in the organization and departmental strategic plans capture the impact on people who are under-represented and historically excluded? How do we measure whether inclusion is increasing or decreasing?
9. Does this collection of data enable us to measure benchmarks to enhance achievements of equity and inclusion?

Are the people most impacted (internally/externally) informed meaningfully and included in discussions and decisions? If so, how?

What policies or practices (formal or implied) contribute to exclusion?

What are you already doing to promote and exercise inclusion?

Who is accountable for making changes that ensure inclusion?

How does our organization hold accountability to change practices and procedures?

Have we considered impact on excluded groups, such as:

- Specific Internal Departments/Teams/Staff
- Women
- BIPOC Groups
- Older Adults / Youth
- LGBTQIA+
- Immigrants & Refugees
- Minority Religious Group
- People who are differently-abled
- People in lower socio-economic demographics
- Who else?

POLICY DEVELOPMENT

When we make policies that are equitable and accessible, we take action to ensure that everyone is included, valued, and protected in the organizational community.

1. What are the equity and inclusion concerns related to this policy issue? (i.e.: accessibility, affordability, safety, culture, gender)
2. Do we check and consider existing policies and practices that may inform how we address equity and inclusion in this new policy?
3. Have we considered and made note of equity and inclusion considerations when developing the business case for the policy?
4. Are the groups most affected by the policy consulted from the early stages of the policy development? How can we ensure they are included?
5. What background information can aid in addressing equity and inclusion?
6. What human and financial resources are required to address equity and inclusion in the implementation of this policy?
7. Are policies equitably applied across our staff and volunteers?
8. If new resources are required in the policy implementation, do we build them in from the beginning? (i.e.: partner with community groups, seek matching funds)
9. Do we communicate the policy to reach the full diversity of people affected? Are all board and staff aware of policies that impact them? How do we ensure this awareness?
10. Do we measure the extent to which the policy contributes to removing barriers or creates opportunities for groups who have been historically excluded?

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MONITORING AND EVALUATION

When we consider equity and inclusion in how we measure results, we take action to ensure that all benefit from the process and outcomes.

1. Have we considered what populations or demographics will be missed by only using certain methods? (i.e.: online surveys, general public consultations,) What other approaches might we use?
2. Are those designing and implementing the evaluation representative of the groups who will participate in the evaluation? How can we ensure their perspectives are included?
3. Do the evaluation questions allow for consideration of the experiences of a diversity of participants and stakeholders?
4. Would it be useful to include those who stopped using the programs/service and potential participants who never use it, in order to assess any unknown biases?
5. Do we hold interviews or focus groups at a location where the community is most comfortable?
6. Do we make it easier for respondents to participate by using interviews from the same population, providing transportation and/or offering an honorarium for focus groups?
7. Do we interview in the language in which the people are most comfortable or have a cultural interpreter available? (i.e.: braille, sign language)
8. When analyzing our data, did we maintain a diversity of the perspectives in the findings?
9. Have we engaged the community in such a way that they could minimize any biases and in a way that people can participate and benefit with dignity?
10. Do we report back to the people who participated in the evaluation process?

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PROFESSIONAL DEVELOPMENT

When we intentionally sharpen our awareness, understanding and knowledge base pertaining to issues of discrimination, bias, and prejudice, we strengthen our organizational capacity to pursue and achieve equity.

1. Do we ensure our staff, board, volunteers, and instructors, pursue and practice cultural awareness and proficiency? What standards have we set in place? What are the consequences for not adhering to the standards?
2. Have the staff and board agreed on a shared understanding of what is diversity, equity, inclusion and access? How is this shared understanding communicated?
3. What practices or procedures are in place to ensure new staff and board members understand and can articulate our shared definition of diversity, equity, inclusion and access?
4. Does the organization ensure that staff and board regularly participate in DEIA trainings in order to increase competency and proficiency in these areas?
5. Are the staff and board kept aware of the current tools, research and resources needed to practice equity? How is this awareness maintained?
6. Do we make DEIA training available to all staff, board, volunteers, and instructors?
7. Do we communicate our commitment to DEIA values to our external stakeholders, donors, and supporters? How do we do this?
8. Are there opportunities for staff, board, volunteers and instructors to contemplate, discuss and present feedback about what they learned in DEIA trainings?
9. Do we allocate funding for staff, board, volunteers, and instructors to participate in DEIA trainings? Is the amount allocated sufficient?
10. Do we have a professional development plan to provide ongoing training for all staff, board and instructors?

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*"Equity is the only
acceptable goal."*

~Paul Farmer~



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