

Diversity, Equity, Inclusion
Organizational Assessment & Planning Worksheet
COFIE Session, October 2014

CHOOSING YOUR TERMS

What terms have been used to frame your foundation's work on these issues?

Are those terms adequate, or are there other concepts that are important to your foundation's framing?

How clear are the definitions you have chosen, as an organization—to internal and external constituencies?

What next steps are necessary in order for your organization to be aligned on chosen terms and to embrace clear definitions for them?

CLARIFYING THE WHY

What is your foundation's mission driven rationale for the importance of diversity, equity, inclusion, and racial justice? Or, what do you think are the key components of that rationale?

How fully has your foundation created a clear, compelling mission driven rationale, with key leaders aligned and the organization engaged? What next steps are necessary to create this clarity and alignment?

INTEGRATION

How do diversity, equity, and inclusion show up in your vision, mission, values statements, strategic plans, and workplans? How should they?

What are the diversity priorities for your staff and board composition, for the profile of your grantees, for the participants in additional foundation programs?

How explicitly have you addressed inclusion in the organization's culture, policies, and practices? What initial steps can you take?

What are the equity and social justice priorities for your grantmaking and programs?

EXPLICIT GOALS AND METRICS

What goals and metrics are used to track your success in integrating diversity, equity, and inclusion?

NEXT STEPS

Who are the key internal constituents for elevating this work, further, within your organization?

What actions can you take to bring additional leadership to this work?

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