

Diversity Equity and Inclusion (DEI) Baseline Assessment Tool

This tool is designed to help organizations assess where an organization is regarding its DEI journey. Its purpose is to provide a visual representation of the results, as well as information to establish a DEI development plan.

We acknowledge that organizations are complex with varying priorities, contexts, and capacities that can leverage or limit DEI capacity building. To respond to these differences, this tool operates on a continuum rather than a ranking system. There is no expectation that any organization will fit neatly into one of the stages. In addition, organizations will be able to offer qualitative comments/insights to support their responses. The descriptions at each point are designed to serve as guides rather than fixed benchmarks.

This tool measures DEI capacity and indicators along ten different dimensions: DEI Mission and Commitment, Leadership, Policies and Procedures, Infrastructure and Capacity, Training and Development, Data and Evaluation, Decision Making, Community Engagement/Partnerships, Inclusion, and Lexicon/Discourse.

DEI Component	Not Yet Started	Just Beginning	Launched/Em erging	Developing/Ev olving	Integrated/Le ading
DEI Mission and Commitment	Does not see DEI as relevant to mission. No mention of DEI in written collaterals or website	Sees DEI as important, is thinking and talking about it but has not yet made any outward expression	Is engaged in conversations AND has drafted a DEI statement and vision.	The DEI statement/vision has been shared with board and staff, is referred to and centered in conversations; has integrated language into program level planning	DEI statement and vision are fully integrated into all levels of the organization (program planning, leadership, performance evaluations)
					
Comments:					
Leadership	Members of leadership, staff and board do not express opinions or take leadership on DEI issues	One or two members of leadership, staff or board bring up DEI during work planning or conversation	There is a point person consistently leading conversation AND action items on DEI	There is a DEI or equity “team” leading both DEI conversation and action items on leadership, staff and board teams	All levels of management are engaged in DEI work with an active role in pushing accountability for growth in DEI
					
Comments:					

Policies and Procedures	Does not have any DEI related policies (other than non-discrimination policy)	Is interested and have begun to research DEI-related policies (has not drafted anything formally yet though)	Some DEI language has been integrated into policy such as broad commitment statement, HR policy, and staff/board training requirements	Has DEI policies integrated into core organizational documents such as strategic and/or operating plans, but still not <u>operationalizing</u> those policies (shows up in day to day choices and/or decisions)	DEI is explicitly integrated into organizational plans, program reviews/audits, with clear processes for review and accountability
					
Comments:					
Training and Development	Has not done any DEI training	Some leadership and/or staff have completed a DEI training or workshop individually, but no plan for organization-level training is in place	All leadership, staff and board have engaged in at least one DEI training as a group; explicit expectations around DEI training have been communicated across the organization	Board, leadership and staff ALL engage in continued DEI training annually as well as ongoing development to deepen skills and understanding	Fosters ongoing DEI training and development among leadership, staff and board; engaged with other organizations in sector-wide or cross-sector DEI development; staff held accountable for setting and meeting DEI goals in their performance plan
Comments:					
Infrastructure and Capacity	Has not had any internal discussions about DEI work	Organization has acknowledged the need for	Individuals or an internal group has engaged in DEI	Formal committees or affinity groups are meeting	Board, leadership and staff utilize processes to

	within the organization	DEI work but no dedicated capacity (time, staff, resources) to begin it.	discussions, but do not have the capacity or support from leadership to move from discussion to action planning	regularly to discuss and integrate DEI into the organization's programming and processes	integrate DEI into organizational culture and decision-making processes to include continuous evaluation and improvement
Comments:					
Data and Evaluation	Demographic data is not collected in programmatic or operational work	Desire to collect demographic data, but not doing so yet	Collects some demographic data in programs or operations (race, gender), but does not analyze or disaggregate the data; no processes in place to utilize the data to inform DEI practices	Collects and disaggregates demographic data in programs and operations; beginning to discuss use of data to inform program or operation improvements	Consistently collects and disaggregates demographic data; data is analyzed and shared across the organization; data is used to inform program planning, strategic planning and decision making
Comments:					
Decision Making	DEI is not a factor in any organizational decision making	Expressed need and interest in using DEI to inform decision making but not sure how; may see it as an add-on that would take too much time/resources	Aspects of DEI (race, gender, socio-economic status, geographic region) are used to inform decisions in an ad-hoc manner; can often depend on who is making the decision, competing priorities, etc.	A consistent tool has is used to apply a DEI lens to decision-making, the tool informs policies, practices, strategy and resource allocations; leadership and staff understanding this expectation	The organization systematically use tools to incorporate DEI into organizational policies and practices, resource allocation as well as strategic planning and annual

				and are trained to use the tool	operating processes
Comments:					
Community Engagement/Partnerships	Is not interested in building partnership with communities impacted by the sector and organization; may also not be aware of why this is connected to organizational mission	Is interested in and values partnership with communities, but does not currently have relationships in the community and/or does not know how to begin	Has begun to build partnership(s) with communities but is in very early stages with no plan or norms for the partnership(s) such as memorandum of understanding or partnership plan	Has an established approach and plan to build trust and partnership with diverse communities; actively engaged in a process to deepen partnership agreements and goals	Community partnerships are active, with leaders from community expressing that the relationship is equitable and mutually beneficial; agreed upon accountability systems have been established and honored
Comments:					
Inclusion	No explicit efforts are made to create an inclusive work environment for diverse leadership, staff and board; no or minimal understanding of inclusion	Understand what inclusion is, and values the idea of being an inclusive organization but has not taken any action yet; may also rely on those from underrepresented groups to communicate their needs	There is acknowledgment and empathy that some staff have disparate experiences however, staff are still held to standards and expectations centered in dominant culture. There may also have been discomfort, silencing or conflict when staff name or question these expectations	The voice of staff from multiple identities is acknowledged, valued and explicitly integrated into aspects of the organizational culture and processes (posting inclusive behaviors, frequent and explicit requests for feedback from leadership); staff report feeling valued	Active and ongoing development of inclusive organizational culture and operations; processes and work products reflect the voice and contributions of diverse staff and community; accountability systems in place to monitor growth in this area

Comments:					
Lexicon and Discourse	DEI terms are not part of organizational documents or used in everyday discussions in the organization; no understanding of structural or systemic oppression (<i>refers to terms such as dominant culture, inclusion, white privilege, systemic racism</i>)	Expressed interest and desire to understand and use DEI language but unsure or unable to take action or utilize terms in work products or conversations	Some individuals use DEI terms in everyday discussion and/or work documents, but it is done sporadically and without systems context or understanding; use of terms may have also resulted in conflict or resistance	Leadership, staff and board share an understanding of the systems that drive bias and disparities, and the impact of individual culture on bias, leadership and decision making; DEI terms are used in discussions and organizational documents	Active and ongoing development of DEI systems-level understanding; consistent evaluation and identification of harmful expressions of dominant culture in organizational expectations and culture; systems in place to address DEI concerns
Comments:					