Equity & Inclusion Lens Guide

Nonprofit Association of Oregon has received generous permission from the City of Ottawa, Canada and the City for All Women Initiative (CAWI) to adapt its Equity & Inclusion Lens Handbook and related toolkits as a guide for our internal and programming interactions. NAO's Equity and Inclusion Lens Guide is based on the 2018 version. To access the original source material, please visit:
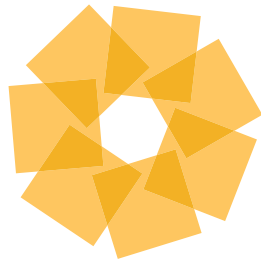
http://www.cawi-ivtf.org/publications/equity-and-inclusion-lens-handbook-2018

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THE NONPROFIT ASSOCIATION OF OREGON

Connect. Improve. Advance.

A Message From NAO

The Nonprofit Association of Oregon's mission is to build the collective voice, leadership, and capacity of nonprofits to enrich the lives of all Oregonians. We believe the nonprofit sector strengthens the fabric of our democracy and our communities by creating many public benefits. We believe that nonprofits have the ability to help our society to address inequities and to create innovative solutions to community issues.

As an organization meant to create public benefit, we recognize that our communities are diverse and so are the needs and aspirations of the people we serve. Incorporating an Equity and Inclusion Lens into how we plan and deliver programs and services and how we support nonprofit organizations, not only helps us remain relevant, meaningful and effective but ensures that we are doing so in a way that thoughtfully engages and includes individuals and communities who have been historically excluded.

This lens was adapted with the generous permission from the City of Ottawa and the City for All Women Initiative from their *2018 Equity and Inclusion Lens Handbook* and related tools and resources. NAO requested permission to adapt this tool with the intention of sharing it with our members as a resource. We are just applying this lens within our own organization. Through refining and piloting this lens in our work, we commit to:

- Take positive steps to remove systemic barriers and promote inclusion;
- Achieve improved satisfaction of our work and services;
- Create a more positive and respectful work environment; and
- Generate better solutions by incorporating diverse perspectives.

We hope that you will find NAO's Equity & Inclusion Lens Guide a useful resource and incorporate it in your daily work and reflect it in your goals and outcomes. Thank you for your commitment to a thriving and equitable nonprofit sector!

Sincerely,

Brad Russell
Board President

Nancy Arriaga Ramirez
Past President

Jim White
Executive Director
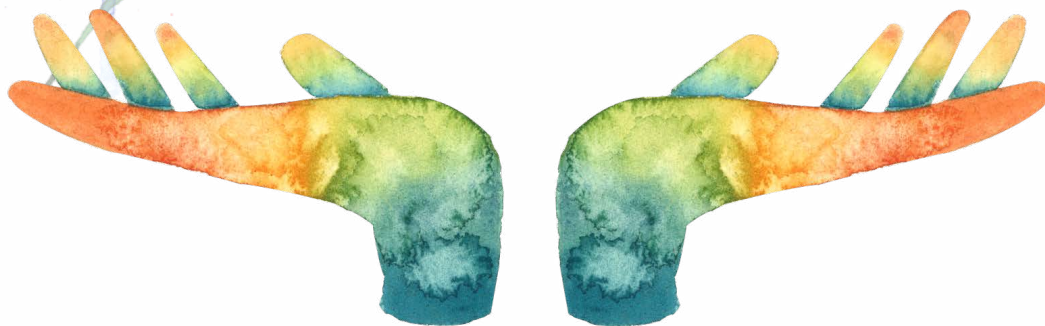
NAO's Equity Statement

As the state membership organization, the Nonprofit Association of Oregon (NAO) is committed to building a more just and equitable Oregon. We recognize the history of oppression that has resulted in ongoing disparities for some communities, as well as the limitations of a nonprofit framework to address them. Yet, we have a powerful network of organizations and change agents with an opportunity before us to create positive systemic change. We believe that nonprofits that prioritize engaging diverse perspectives and evolve to be inclusive, behave equitably and have profound impacts on society.

For the above reasons, NAO is committed to transforming each aspect of our organization by confronting our own biases and operationalizing our values. We know that intention alone will not change things. To this work, we bring the successes and mistakes of our own continuing efforts in the direction towards equity on behalf of our members and all nonprofits. The mission and vision we hold for enriching the lives of all Oregonians, move us to directly challenge ourselves and to deconstruct frameworks of oppression while building opportunities for learning, change and accountability. We know:

This work is urgent, and we will always be learning.

We will make mistakes and own our responsibility for corrective action.

Our efforts will be tireless, and we will not stop.

NAO is committed to our own equity journey, the diversity of our membership and the broader nonprofit community as change agents that contribute to an inclusive and equitable Oregon that champions our rich diversity.

Approved by the Board of Directors on July 20, 2018

Why an Equity & Inclusion Lens?

An Equity and Inclusion Lens is like a pair of glasses. It helps you see things from a new perspective. It helps you be more effective in your everyday work by getting a clearer focus and a more complete view. In turn, the full inclusion and participation of community members and employees contributes to a vibrant society where everyone benefits.

An Equity and Inclusion Lens can help to:

- Strengthen everyone's awareness of and ability to incorporate difference.
- Create teams that are relevant to and representative of community.
- Create energizing and innovative work environments.
- Collectively address systemic barriers and inequities.

> *An Equity Lens is something you use daily; it's essential to ensure we are asking ourselves the questions that will make us think about being equitable and inclusive in every aspect of our work and interactions.*

Who is the Lens for?

This Lens is for <u>everyone</u> doing the work of NAO and for everyone we work with.

- Nonprofit leaders, staff, board and volunteers.
- Community partners, consultants, funders and businesses that support nonprofits.
- Government organizations that partner with us and with nonprofits.

Using This Guide

The NAO Equity & Inclusion Lens Guide is an *interactive tool* that will help you learn about equity and inclusion and how to apply it to your work. Change takes place in different ways and is ongoing. We are all learning. It is a lifelong process.

When we consider our own diversity, check our assumptions, ask about inclusion, and apply our insights to our work, we can create change. The end result is that we become a change agent and take action.

Step 1: Consider Your Diversity

Recognizing diversity within ourselves and others can help us understand how multiple factors influence the way we provide services, design policies and programs, or interact with staff and community members or stakeholders.

Step 2: Check Assumptions

When we question our own ideas and biases, we can open up to new ways of understanding. Keep in mind that each of us could identify with more than one group, and that individual personalities make each person unique.

Step 3: Ask About Inclusion

By always asking some intentional questions, we can thread equity and inclusion throughout our work.

Step 4: Apply to Your Work

To help us apply equity and inclusion to a specific area of work, we can ask some practical questions and learn from examples of how others have applied the lens.

Step 5: Be a Change Agent – Take Action

When we become a change agent and take action, we commit ourselves to using the information we learn in this work. It is not a one-time action. Being a change agent is a lifelong learning process of asking questions so we can apply (and re-apply) insights to action.
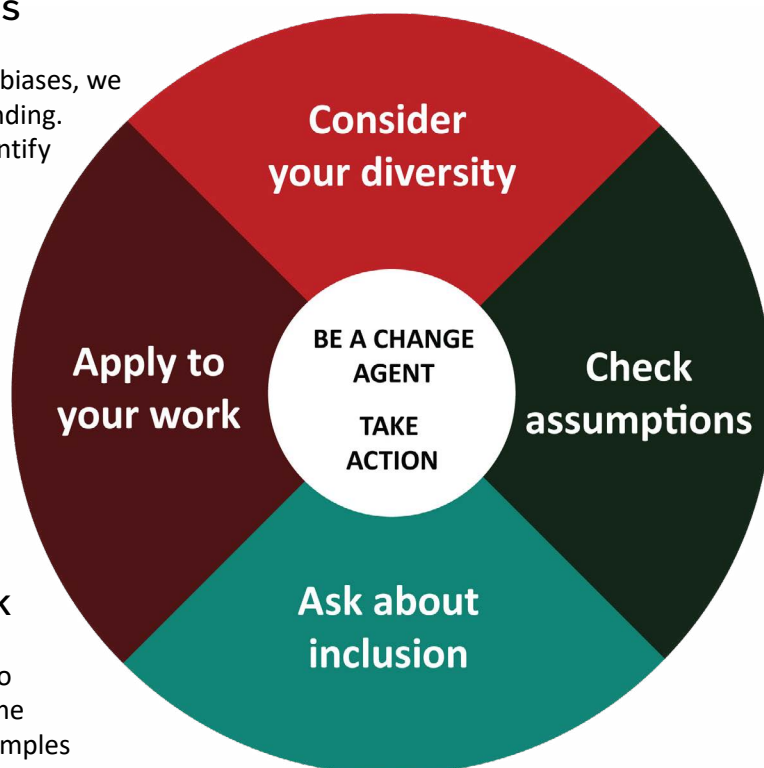
Terms to Get Started

Diversity
A wide range of qualities and attributes within a person, group, or community. When we celebrate diversity, communities and workplaces become richer, drawing upon the variety of experiences, perspectives, and skills that people can contribute.

Assumptions
Something we presuppose or take for granted without questioning it. We accept these beliefs to be true and use them to interpret the world around us.

Stereotypes
Making assumptions about an entire group of people. We generalize all people in a group to be the same, without considering individual differences. We often base stereotypes on misconceptions or incomplete information.

Bias
Showing prejudice in favor of or against a person or group compared with another, usually in a way considered to be unfair. We all have both conscious and unconscious biases that shade our thinking and interactions.

Inclusion
Acknowledging and valuing people's differences so as to enrich or shift social planning, decision making, and quality of life for everyone. In an inclusive society, we all have a sense of belonging, acceptance, and recognition as valued and contributing members of society.

Privilege
The experience of unearned freedoms, rights, benefits, advantages, access, and/or opportunities afforded to members of a particular dominant group in society or in a specific context.

Change Agent
A person who assumes leadership by working with others to create and influence change in the organization or the wider community. This often grows out of the self-awareness of inequities or privileges we have experienced or seen. Action is taken individually or collectively to create conditions that enable everyone to have equal access to resources and benefits.

What is Equity?

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.
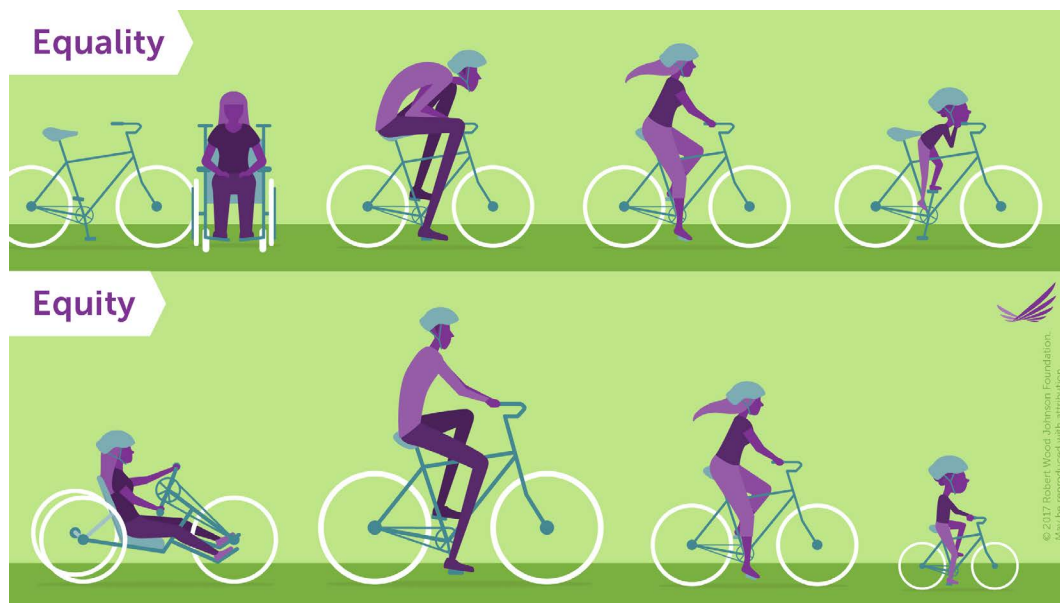
You have probably seen an image or series of images like this to help explain the difference between equality and equity, and to visualize what it would look like if there were no systemic barriers. While the visual metaphor may be imperfect, it provides a compelling way to understand equity and to begin a dialogue about these important concepts in our social groups and organizations. The infographic above is available through the Robert Wood Johnson Foundation (www.rwjf.org) as part of their Visualizing Health Equity: One Size Does Not Fit All #PromoteHealthEquity project.

? **What obstacles to equity are being maintained through your workplace culture, policies, practices and service delivery?**

Systemic Barriers
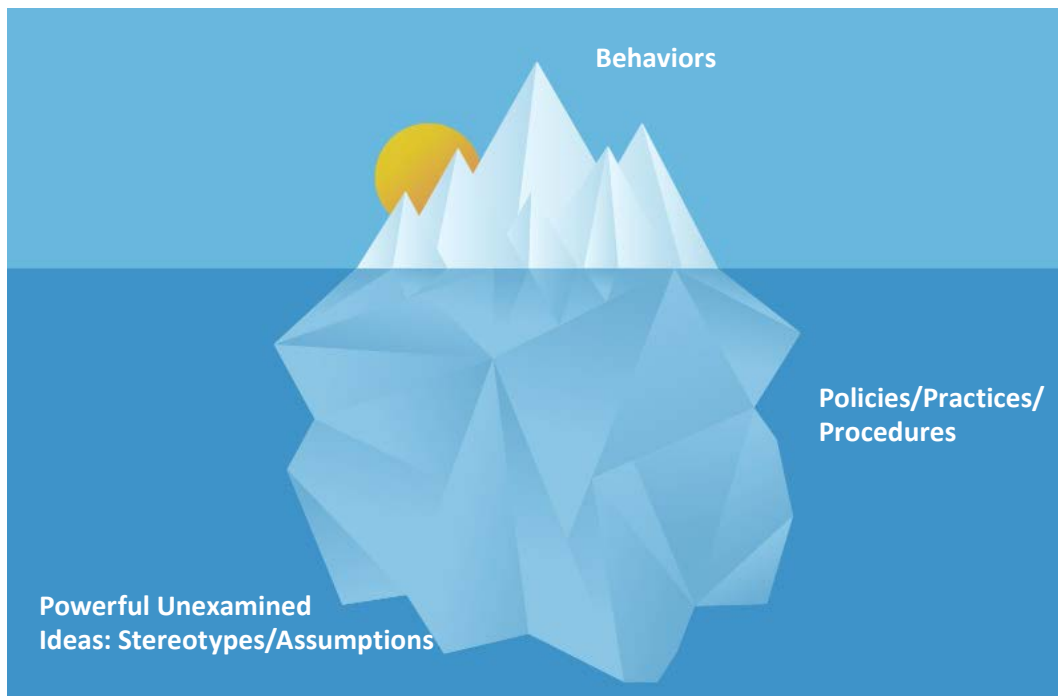
When we see people treating each other unfairly, we may think that just by addressing the behavior the problem is addressed. However, making the problem about individuals' behavior alone does not address the context in which the behavior is operating. We need to look beyond the surface to see what else is going on, because like an iceberg, 90% of what is happening is under water and out of our view. That is, defined behavior expectations are critical to change but we need to look at the structural problem to identify built-in mechanisms that support current behaviors in order to create new paths (policies, processes, practices) that will sustain change in a system.

? What are the systemic barriers experienced by people in your workplace or by people you serve?

Step 1: Consider Your Diversity

As a consequence of systemic barriers and inequities, we all have experienced exclusion in some areas of our life, but inclusion in others. Each of us has multiple factors at play in our lives. Who we are could contain a variety of life experiences, multiple social factors, and crossovers with many groups. It is this intersection or crossover of identities of who we are that affects how we experience the world around us.

This is called **intersectionality.**

This is made visible on the *Diversity Wheel* on the following page.

- THE **first circle** represents your **LIFE EXPERIENCES.**

- THE **second circle** represents the **SOCIAL FACTORS** that influence your life experiences: racial or ethnic identify, sexual orientation, ancestry, age, education, social class, gender identity, religion or spirituality, length of time in community, geographic location, place of origin, income, immigration status, marital or family status, language, and other factors.

- THE **third circle** represents the **ORGANIZATIONAL FACTORS** that might add a layer of how you experience your workplace: your position as a board member, leader, manager, supervisor, staff, or volunteer. Your occupation and profession, your lengths of service, whether you are full-time, part-time, on contract, or a volunteer.

- THE **outermost circle** represents the **"-isms" or overarching systems of power** that indirectly and directly impact your life such as: racism, heterosexism, sexism, classism, ethnocentrism, transphobia, ageism, homophobia, ableism, and any other forms of discrimination that aim to maintain separation among group members.

When we reflect on our own experiences, we can go to the next step to ask:

To what extent does this relate to the degree to which we will experience inclusion or exclusion (privilege or marginalization) in a given content? Sometimes we experience both.

Take a few moments to identify areas in your life where you have had advantages or disadvantages. In some areas of your life, you may find it has been both an advantage and a disadvantage at different times of your life.

- Underline advantages
- Circle disadvantages
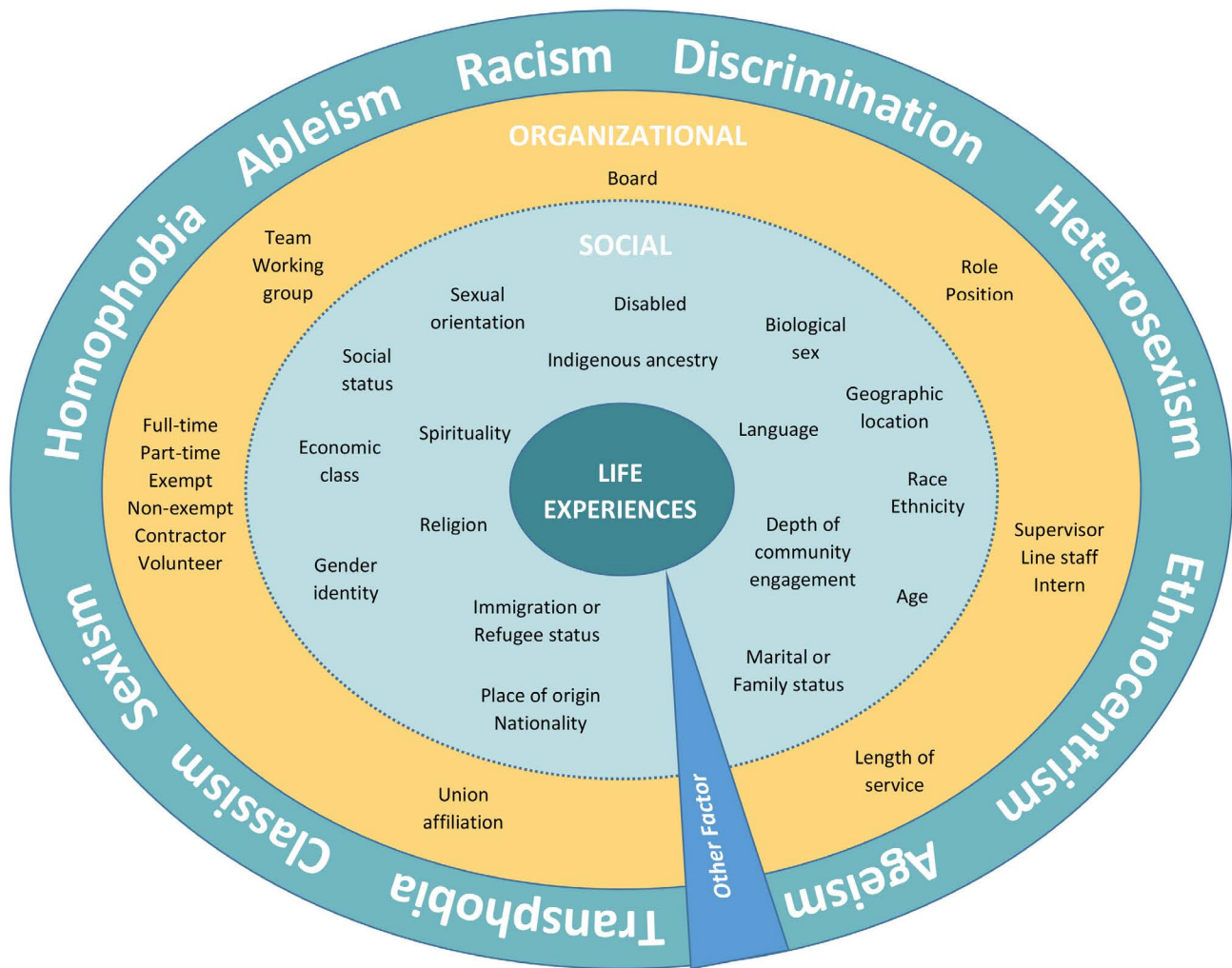
How can you use your experience to understand and become an agent of change to shift exclusionary practices in your work and workplace?

Step 2: Check Assumptions

Considering a situation from the perspective of people who are or who have been excluded is a key step in promoting equity and inclusion. It is an ongoing learning process for everyone.

Check assumptions; Be curious. Stay curious!

? **What are the assumptions taking place here?**
Does this happen in our workplace?
Does this happen in the services we provide?

Illustration by: Vecteezy

Historically Excluded Groups*

There are specific groups or identities who have been historically excluded in an ablest, white, male-dominated, heterosexual society that favors urbanism. It is important to remember that there is diversity within each of these groups. All groups are not at risk of exclusion in every context. You may identify other people who have been historically excluded in a given context or in the work you are doing. This list is not intended to be all-encompassing. The way a group of people choose to identify themselves can and will expand beyond the groups described below. Each of us could identify with more than one group. It is this intersection of who we are that affects how we experience our workplaces and the communities and geographic regions where we live.

Native and Indigenous people

People Living in Poverty

People of Color

People with Disabilities

LGBT2SQIA+ people**

Immigrants & Refugees

Minority Religious Groups

Older Adults

Women

Youth

Other groups

*Note: NAO is committed to working with our staff, board and stakeholder nonprofits representing each of these communities to understand self-determined definitions of each group and the intersectionality that further compounds exclusion, that is, being a member of multiple excluded groups, living in rural environments, etc.

**Note: Lesbian, Gay, Bisexual, Transgender/Transsexual, Two Spirited, Queer/Questioning, Intersex, Asexual, + other forms of sexual expression.

Step 3: Ask About Inclusion

By always asking these questions below, we can thread equity and inclusion in all the work we do. We can apply them to a given moment, decision, or to a larger planning process.

? **Are the people most impacted and informed meaningfully included in discussions and decisions?**
What policies or practices contribute to the exclusion?
Who is accountable for making changes that ensure inclusion?

Illustration by: Vecteezy

Step 4: Apply to Your Work

When diversity, equity, and inclusion are reflected throughout the organization, we benefit from a diversity of insights and are better prepared to address the needs of the populations we serve. From strategic planning to managing human resources to direct service, equity and inclusion matters.

After asking yourself these questions about inclusion:

> **?** **Are the people most impacted and informed meaningfully included in discussions and decisions?**
> **What policies or practices contribute to the exclusion?**
> **Who is accountable for making changes that ensure inclusion?**

Apply these answers and the detailed equity and inclusion lens question sets in your work (see Appendix - pages 16-29). Select the area or areas of work that best relate to the work you are doing now. *Keep in mind, this includes both internal and external work.*

- Communications
- Engaging Community, Staff and Board
- Gathering Information and Research
- Leading and Supervising
- Monitoring and Evaluation
- Planning
- Policy Development
- Recruiting and Hiring
- Strategic Planning
- Training
- Working with People
- Public Policy

Illustration by: Vecteezy

Step 5: Be a Change Agent — Take Action

It is not enough to say that I did not intend to be hurtful; it is the actual impact that matters regardless of intentions.

When I am a change agent or take action…

- I listen.
- I am aware of my own advantages and disadvantages and how I can use them to make a difference.
- I check my assumptions to unlearn biases and stereotypes.
- I stand beside and walk with others.
- I speak up against hurtful comments or insulting action, rather than wait for others to point out.
- I take steps to make the workplace and services inclusive, safe, and welcoming.
- I help others to understand discrimination and exclusion.
- I avoid the trap of "knowing what is good" for someone else.
- I share power and promote the leadership of others.
- I realize that being an agent of change requires ongoing learning.
- I listen some more.

I am an agent of change when I take the initiative to join with others in creating change in the organization and ensure that our programs are equitable and inclusive of the wider community.

Illustration by: Viktoria Kurpas

Appendix - Applying to Your Work

Equity & Inclusion Lens Worksheet

Are the people most impacted and informed meaningfully included in discussions and decisions?

_____

_____

_____

_____

What policies or practices contribute to the exclusion?

_____

_____

_____

_____

What are you already doing to promote inclusion?

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Who is accountable for making changes that ensure inclusion?

_____

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_____

How does our organization hold accountability to change practices?

_____

_____

_____

_____

Historically Excluded Groups

Native & Indigenous people

People Living in Poverty

People of Color

People with Disabilities

LGBT2SQIA+ people

Immigrants & Refugees

Older Adults

Minority Religious Groups

Women

Youth

Who Else?

COMMUNICATIONS

When we apply equity and inclusion to all 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 are heard and reached? (e.g., working with community leaders, direct outreach, bulletin boards, community newspapers, social media).

3. How do the messages we are communicating foster inclusion, respect, and equity?

4. Are the messages we communicate inclusive, respectful, truthful, and equitable across all audiences?

5. Are there concepts or terms that may be culturally specific and need to be changed to make them more accessible?

> **Ask About Inclusion**
>
> Are the people most impacted and informed meaningfully included in discussions and decisions?
>
> What policies or practices contribute to the exclusion?
>
> Who is accountable for making changes that ensure inclusion?

6. Is the medium easily accessible and understood by the full diversity of our audience? (e.g. plain language, accessible formats, graphics, multiple languages, both online and print, phone messaging and voicemail).

7. Have we considered what populations will be missed by only using certain methods? (e.g. online, email or social media communications) 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 and communities? 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 and passive, who is at the center, and who is serving and being served.

ENGAGING COMMUNITY, STAFF & BOARD

When we welcome the diversity of perspectives of 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 fully participate? How can we create opportunities for people least likely to be heard to ensure they share their specific concerns? E.g. use of multiple techniques such as focus groups and online surveys, types of questions asked, simultaneous interpretation, sign language, 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 a diversity of perspectives?

3. Which employees, groups or community groups with experience in these specific communities can help us conduct outreach? How are we compensating these outreach partners?

4. Is there a history – between the organization and community, or between communities – that you need to consider? If that 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?

6. What steps can we take to remove barriers to our presence where community gathers for full participation? (e.g., dependent care, transportation, safety, language, accessible location, time, multiple formats, avoid religious and cultural holidays, culturally appropriate).

7. Is the environment welcoming to participants who may be reluctant to share their views? If not, what can we do to change this? (e.g., pair up a new participant with an experienced one to help those new to the process feel encouraged to participate). Does the pace, format and language of the engagement accommodate everyone including participants who are least likely to speak up and for whom the information may be new?

8. Are the insights from groups who face systemic barriers and inequities reflected in the report and final product?

9. How will we demonstrate accountability and commit to report back the findings to the full diversity of people who were involved in the engagement activity?

Ask About Inclusion

Are the people most impacted and informed meaningfully included in discussions and decisions?

What policies or practices contribute to the exclusion?

Who is accountable for making changes that ensure inclusion?

GATHERING INFORMATION & RESEARCH

When we consider diversity in conducting environmental scans, needs assessments or collecting data, we take action to be inclusive of everyone.

1. Will our data gathering plan identify specific areas where we may unintentionally limit equity and inclusion? (e.g., safety, accessibility, affordability, cultural specificity, family responsibilities, access to decision-making, racial profiling).

2. What current statistics or demographic data would help us understand our role in creating and our intention to remove systemic barriers and inequities in relation to the issue in question?

3. Will the data we gather capture the diversity of the population? (e.g., broken down to make differences visible or "disaggregated."

4. When using gender neutral language (people, head of household, the homeless, sole-support parent, immigrants), are we also distinguishing differences between women and men and gender nonconforming people in that specific group? (e.g. female heads of household versus male heads of household).

5. Do the research questions help us identify who may be excluded and what is needed to ensure they will benefit the groups we intend?

6. Are we making assumptions that we need to verify or unpack? (e.g. all parents in a program will be heterosexual or gender conforming).

7. How might we consult with and compensate the people most affected by this issue (including staff) to ensure the reliability of the data, approach, and findings? (e.g., ask community leaders about the cultural appropriateness of the data or approach).

8. Does our final report include the findings on specific equity and inclusion concerns and recommendations we identified?

9. How will we report back the findings and next steps to the people who were involved in the research?

10. Are we following our own privacy policies in the collection and dissemination of data and information?

Ask About Inclusion

Are the people most impacted and informed meaningfully included in discussions and decisions?

What policies or practices contribute to the exclusion?

Who is accountable for making changes that ensure inclusion?

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 and volunteers that inappropriate behavior such as offensive jokes and 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 to contribute positively in creating an inclusive workplace?
   - Do I lead by example?

2. Do we utilize support systems for employees who have been harassed, treated in a disrespectful manner, or discriminated against by co-workers, supervisors, or stakeholders?

> ## Ask About Inclusion
>
> Are the people most impacted and informed meaningfully included in discussions and decisions?
>
> What policies or practices contribute to the exclusion?
>
> Who is accountable for making changes that ensure inclusion?

3. Are there policies, procedures and/or practices, and attitudes that unintentionally prevent some people from fully engaging in our work? (e.g., schedule conflicts with religious holidays or family responsibilities; workload distribution) What alternatives are possible?

4. Are policies and benefits equitable across all team members?

5. Are we aware of our commitments to equity and inclusion and do we ensure that staff is equally informed?

6. Is equity and inclusion incorporated into the criteria for evaluating candidates for promotions or management positions? If not, how might we include it? Do we project opportunities?

7. What opportunities could we create to enable people from marginalized groups to bring new perspectives to our team and acquire experience? (And move into higher-level positions? E.g. internships, job shadowing, students). What biases prevent us from creating these opportunities?

8. Are equity and inclusion incorporated into our staff performance review process?

9. Do direct reports have an opportunity to weigh in on their supervisor's evaluation?

MONITORING & 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 will be missed by only using certain methods? (e.g., 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 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 population is most comfortable?

6. Do we make it easier for respondents to participate by using interviewers from the same population, providing transportation and childcare, 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. spoken language, 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?

Ask About Inclusion

Are the people most impacted and informed meaningfully included in discussions and decisions?

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PLANNING
Services, Projects, Programs & Events

When we consider the range of equity and inclusion issues,
we take action to eliminate barriers so that everyone can benefit.

1. Do we budget adequately?

2. Do the expected outcomes of the service, project, program, or event reflect the equity and inclusion goals?

3. How will the service or program contribute to more equitable access to resources and benefits in the wider community?

4. Have the primary groups been consulted? (See Engaging Community, Staff & Board).

5. How is the proposed service, project, program, or event designed to ensure that a full diversity of people can participate and benefit with dignity? (i.e., accessibility for mobility devices, visual and hearing impairments, child or dependent care, transportation, safety concerns, language).

6. Does the time of the event or hours of the service consider potential demands on people's time? (i.e., religious and cultural holidays, harvest time, family responsibilities).

7. Have we considered and made note of equity and inclusion considerations in our business plans and project management plans?

8. Are the long-term needs of people from historically marginalized groups considered in our long-term planning?

9. Are there good equity and inclusion practices in other organizations, departments, or community organizations that can inform the implementation?

10. What human and financial resources are required to address equity and inclusion in the implementation of this service, project, program, or event?

Ask About Inclusion

Are the people most impacted and informed meaningfully included in discussions and decisions?

What policies or practices contribute to the exclusion?

Who is accountable for making changes that ensure inclusion?

POLICY DEVELOPMENT

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

1. What are the equity and inclusion concerns related to this policy issue? (e.g., accessibility, affordability, safety, culture, gender identity).

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? (See Engaging Community and Staff).

5. What background information can aid in addressing equity and inclusion? (See Gathering Information Research).

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? (e.g., partner with community groups, collaborate across branches, and seek matching funds).

9. Do we communicate the policy to reach the full diversity of people affected? (See Communications). Are all board and staff aware of policies that impact them?

10. Do we measure the extent to which the policy contributes to removing barriers or creates opportunities for people who have been historically excluded? (See Monitoring and Evaluation).

Ask About Inclusion

Are the people most impacted and informed meaningfully included in discussions and decisions?

What policies or practices contribute to the exclusion?

Who is accountable for making changes that ensure inclusion?

RECRUITING & HIRING
Staff & Volunteers

When we integrate equity and inclusion in our hiring practices and policies,
we take action to increase diverse skills and perspectives in the workplace.

1. Do staff and volunteers in our work area reflect the diversity of the community we serve? Who is under-represented?

2. What knowledge, skills, experience, and diversity would enhance our team's capacity to be more relevant?

3. Do job requirements and selection criteria unnecessarily limit who would qualify?

4. Have we considered where best to post this employment opportunity to ensure that the widest diversity of people are able to access it? Do we encourage staff, board, and community partners to help with outreach to help broaden the applicant pool from diverse groups?

5. How do we ensure interview panels are composed of individuals who bring diverse backgrounds and experiences relevant to the position?

6. Have we considered ways to reduce barriers in the interview process to make it more welcoming and friendly (i.e., physically accessible, provide a copy of the questions?)

7. Do we consider that people from specific backgrounds may present interview behaviors that don't match our biases and still have the skills to do the job?

8. Do we adequately compensate a language differential if the job requires a knowledge of a specific language or culture?

9. What checks and balances do we have in place to counter unconscious or undisclosed biases in hiring?

Ask About Inclusion

Are the people most impacted and informed meaningfully included in discussions and decisions?

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STRATEGIC PLANNING

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

1. How does our strategic planning process promote equity and inclusion? Are staff, board, and stakeholders involved throughout the process?

2. Do the long-term goals you 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 stakeholders or employees 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 this 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 the collection of data enable us to measure benchmarks to enhance achievements of equity and inclusion?

Ask About Inclusion

Are the people most impacted and informed meaningfully included in discussions and decisions?

What policies or practices contribute to the exclusion?

Who is accountable for making changes that ensure inclusion?

TRAINING
Staff & Volunteers

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

1. Do we include equity and inclusion requirements when planning or staffing for internal and external trainers? (i.e., able to reduce biases and work respectfully with people across diversity).

2. Do we include equity and inclusion requirements in our procurement documents when sourcing trainers?

3. Do we prioritize recruiting trainers from diverse backgrounds so they reflect the population 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 the training? Is specific outreach required to include them? Are barriers addressed? (e.g., safety, language, accessible location, time, avoid religious cultural holidays, culturally appropriate, accommodations).

7. Have we integrated the diverse perspectives of people who have specific equity concerns or needs, even if they may not be obvious? (LGBTQIAA+ identities, dietary, auditory, language needs or preferences, accommodations).

8. Is the content sensitive to the experience of participants who may experience systemic barriers and/or injustices?

9. Does the content include the perspectives of participants, stakeholders and/or staff who will be accessing the service?

10. In the evaluation of the training, do we ask whether there were any barriers to participation or whether they found the facilitator to be inclusive of the diversity of participants?

11. Are there cost barriers for some communities and how do we balance those with our own financial health?

Ask About Inclusion

Are the people most impacted and informed meaningfully included in discussions and decisions?

What policies or practices contribute to the exclusion?

Who is accountable for making changes that ensure inclusion?

WORKING WITH PEOPLE

When we treat people with respect, we are taking action to create
a welcoming workplace and quality service.

1. When we interact with people do we check our own assumptions and biases? Ask...

   • Do I hold assumptions about people that get in the way of how I work with them?
   • 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 their contributions?
   • Do I lead by example?

2. Are we paying attention to those who are not expressing their ideas?

3. How do we encourage feedback and full participation from everyone present?

4. Are we raising issues in a way that encourages dialogue?

5. Do we consider potential barriers in each situation, and work to minimize them? (e.g., language, prejudice, sexual or racial discrimination).

6. If we are not sure what barriers may exist, do we ask our colleagues or the people we serve?

7. Do we discourage jokes, insults, and negative comments that are offensive to people?

8. Do we recognize and build on the strengths and assets of all individuals?

9. Are there procedures, policies, and practices in place that limit our capacity to be inclusive? Are there others who support our capacity to be inclusive?

10. What action can we take to address this or to bring awareness to the supportive policies?

Ask About Inclusion

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PUBLIC POLICY

When we engage in public policy and advocacy efforts, we take action to ensure that everyone is included and all voices are heard in the nonprofit sector.

1. Who does the issue affect and to what degree? Are historically marginalized groups aware and involved in the advocacy effort?

2. Would our involvement help advance equity and inclusion, reducing disparities? What measured difference could our advocacy make?

3. Would our involvement advance our mission and draw on our expertise, positioning, and knowledge and forward our values? Do we have a unique contribution to add?

4. From whom do we need feedback? How will we solicit that feedback ensuring an approach aligned with our equity and inclusion principles? How will we disseminate/communicate our stance to the most affected populations?

5. Does the policy in question affect the issue or populations we are prioritizing to serve in a significan way?

6. Do we have the capacity to be effective advocates on this issue?

7. Who else is engaged and who is missing from the effort? Who is leading efforts? Would engagement create conflicts with people from historically under-represented groups?

8. What opportunities for new partnerships can come from engagement?

9. How will involvement with the issue impact the organization's brand and ability to raise funds? Are we ready to take a stand with our funders if they disagree with the approaches and positions we are taking?

Ask About Inclusion

Are the people most impacted and informed meaningfully included in discussions and decisions?

What policies or practices contribute to the exclusion?

Who is accountable for making changes that ensure inclusion?

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