

Diversity, Equity, and Inclusion (DEI) Self-Assessments

Conducting a Self-Assessment

Before crafting a Diversity, Equity, and Inclusion (DEI) plan or policy, nonprofits might first conduct an organizational self-assessment. Self-assessments should include staff, volunteers, and stakeholders at varying levels of the organization; should focus on specific strengths and areas of growth; and should be conducted in an open, judgment-free environment.

By conducting a self-assessment, nonprofits can better understand what level of Diversity, Equity, and Inclusion the organization as a whole – and its leaders, staff, and volunteers – are exhibiting in:

- The mission, values, and goals of the organization
- Organizational policies, procedures, administration, and staffing
- Building workplace culture
- Program and/or service delivery
- Outreach, fundraising, and advocacy efforts
- Partnership building and maintenance

Sample DEI Self-Assessments

An organization's leadership should review available assessments carefully to determine which one(s) are the best fit for your organization and its needs. The Standards for Excellence Institute's sample assessment tools look at an organization's Diversity, Equity, and Inclusion in terms of its strategic factors, accessibility, and policies and procedures. They provide a straightforward approach to reviewing current activity in these areas. An organization's leadership should review the assessments carefully to determine which one or which ones are the best fit for your organization and its needs. It is expected that the sample assessments in Attachments B, C, and D will provide a sample or basis for your organization to develop its own assessment.

Attachment B

Sample Self-Assessment for Nonprofit Organizations

Diversity, Equity, and Inclusion

The self-assessment in Attachment B is the most comprehensive of the samples in this resource packet. It is intended for individuals who have a strong grasp of all aspects of the organization and intimate knowledge of the day-to-day work of the nonprofit. For some organizations, Attachment B will be most appropriate for all staff members to complete. For others, this assessment may be most appropriate for senior leadership or team leaders.



**Organizational Diversity, Equity and Inclusion (DEI)
Self-Assessment Tool**

This tool is designed to help your organization better understand the status and identify action steps for increased the diversity, equity, and inclusion (DEI) within your organization. The assessment can be completed as a group exercise or individually, with responses aggregated for review and analysis. The focus of your responses should be on the **organization**.

The DEI self-assessment is organized into six key areas that will help your organization identify:

- Current strengths
- Areas for improvement
- Priorities for action
- Potential partnerships
- Resources to obtain or share

Depending on its mission, programs, and stakeholders, each organization will define DEI in its own way. For purposes of this assessment, be sure to consider culture in a broad sense, with race or ethnicity as central and interconnected with other aspects of culture that may create a very different dynamic (such as history, geographic background, communication style, gender roles, value systems).

Please rate the following statements by checking the response that most closely matches your status.

Mission, Strategy and Evaluation						
	Strongly Agree	Neutral	Agree	Strongly Disagree	Don't Know	N/A
A high-level commitment to Diversity, Equity and Inclusion (DEI) is important to our organization achieving its mission with greater impact.						
We have created a group or taskforce to help us think about how we might advance diversity, equity and inclusion						

	Strongly Agree	Neutral	Agree	Strongly Disagree	Don't Know	N/A
Our organizational mission, vision and/or values demonstrate a commitment to DEI						
We have DEI goals for our organization in our strategic plan						
We have data on the demographic makeup of our workforce and community(ies) we serve						
We have data on the demographic makeup of community(ies) we serve						
Program participants are treated with respect and cultural differences are valued.						
Speakers for our events and people featured in our materials represent different cultural and linguistic backgrounds and are inclusive of people with disabilities.						
Research sponsored by our organization is inclusive and respectful of non-Western thought and traditional knowledge reflecting the value of cultural ways of knowing.						
We are sensitive to how we utilize data when we represent our program participants or members of the community.						
We maintain data on the demographics of the people we serve.						
We maintain data on our staff.						
We maintain data on our volunteers.						

We analyze demographics data and make improvements and outcomes.						
LEADERSHIP: Board, Staff & Volunteers						
	Strongly Agree	Neutral	Agree	Strongly Disagree	Don't Know	N/A
Our leadership sets the example in the DEI work beginning with the board and executive leadership						
We currently employ a set of DEI best practices at our organization						
We provide training on DEI best practices for our board, staff and volunteers						
Our board and staff are held accountable for the organization's established DEI practices						
We have conducted an organization-wide assessment of our DEI work including policies, practices and procedures						
Our Board includes:						
a. People with disabilities						
b. People with different racial backgrounds						
c. Gender Balance						
d. Diversity of age groups						
e. Representative of the people we serve						
Legal Compliance & Ethics						
	Strongly Agree	Neutral	Agree	Strongly Disagree	Don't Know	N/A
We have developed a DEI policy for our organization						
We implement our DEI policy effectively						
We provide accommodations when needed for people with disabilities in our office and programs.						

Our current hiring practices effectively incorporate DEI best practices						
Finance & Operations						
	Strongly Agree	Neutral	Agree	Strongly Disagree	Don't Know	N/A
We hire consultants and vendors that reflect our commitment to DEI (how we contract, retain and pay)						
We review our compensation for all staff to ensure equitable salaries						
Our expense reimbursement practices and policies are designed in a way that is comfortable for individuals from all income levels.						
Our technology and cell phone usage policies acknowledge different levels of income and internet access for staff.						
Resource Development						
	Strongly Agree	Neutral	Agree	Strongly Disagree	Don't Know	N/A
We treat our partners equitably in regard to decision making and distribution of resources.						
We engage a diverse pool of donors.						
Our fundraising materials are reflective of diverse donors and program participants						
Our fundraising committee has diverse leadership and participation.						
Public Awareness, Engagement & Advocacy						
	Strongly Agree	Neutral	Agree	Strongly Disagree	Don't Know	N/A
Citizens of the community can access our services regardless of race, gender, ethnicity or disability.						

	Strongly Agree	Neutral	Agree	Strongly Disagree	Don't Know	N/A
We look for partners who will work with us to improve our DEI efforts in the community.						
We are sensitive to our messaging on the web, email, flyers, invitations and events.						
We are diligent to engage the public in communities serve diverse constituencies.						
Our partnerships and engagement grow out of intentional relationship building with the community and others.						
Our offices are clean and welcoming, ADA ¹ compliant and fully accessible to people with disabilities.						
Our programs and events are accessible to people with disabilities.						
Our offices are accessible by public transportation (if applicable).						
Our website is compliant with accessibility criteria.						

*ADA (*American Disabilities Act*)