ORGANIZATIONAL "BEST IN CLASS" INDICATORS FOR RACIAL EQUITY

Racial equity is everyone's work. It's urgent, everyday, lifelong work. After our racial equity trainings, we encourage every participant to identify what they specifically can do within their sphere of influence and work responsibilities, and start doing it. Organization-wide, however, advancing racial equity requires plans with timelines for the extensive work that typically is entailed. This tool is intended to help organizations devise an overall plan for becoming an accountable, equity-driven operation.

HOW TO USE THE TOOL:

1. Ask managers (large organizations) or all staff (small organizations) to complete the tool by indicating by each item the extent to which the item describes your organization, using the rating system below. (Variation: Managers in large organizations may want to complete the tool first with their specific staff, and then bring those results as input for the all-manager discussion.)

2. Hold a discussion among those who complete the tool to arrive at a single group rating for each item. Discuss any areas where initial ratings vary. If agreement cannot be reached, it may be useful, then, to opt for the lower rating.

3. Use the Summary Sheet following the tool to devise an overall plan for becoming a fully race-informed/equity-committed organization.

4. NOTE: You can adapt this set of indicators to the specifics of your organization, deleting features that do not apply and adding any that are relevant to the specifics of what you do.

HOW TO RATE YOUR ORGANIZATION:

For each of the bulleted items, please rate in the space to the left which of the following phrases best describes your organization:

1. *Don't know the status of this item or N/A to our work*

2. *Not currently doing this*

3. *Have just started doing this*

4. *Still have work to do to make it a regular part of our work*

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5. *Has become a regular part of our work*

6. *Is "hard-wired" into organizational policy*

THE RATING TOOL:

A. Has the organization made an expressed commitment to racial equity? (2 indicators)	
1.	**Vision and mission statements** that include an expressed commitment to racial equity
2.	Incorporation of equity lens into **strategic plan** with performance measures

B. Has the organization authorized an intentional focus on racial equity in its organizational policies? (6 indicators)	
1.	Policy for **board diversity**
2.	Policy for **staff diversity** (e.g., recruitment, hiring, retention, benefits)
3.	Policy for **vendor diversity**
4.	Policy for **investment advisor diversity** (if applicable)
5.	Policy for **asset investment** to support DEI/do no harm (if applicable)
6.	**Programmatic** policy that expects *all partners* to address racial equity

C. Has the organization implemented racial equity practices in its operations? (11 indicators)	
1.	Active **inclusion of members of color on the board** (e.g., key committee assignments, capitalizing on member strengths and networks)
2.	Efforts to create a **diverse pipeline of potential board members**
3.	Active **inclusion of members of color on the staff** (e.g., key assignments, capitalizing on staff strengths and networks)
4.	Efforts to create a **diverse pipeline of potential staff members**
5.	Support for **internal affinity groups focused on racial equity** (e.g., meeting time and space, incorporation of views into organizational decision making)
6.	Active **inclusion of members of color on the investment advisory team** (if applicable) (e.g., key responsibilities, capitalizing on member strengths and networks)
7.	**Diversification of donors**
8.	Active **inclusion of vendors of color** (e.g., quicker reimbursement schedule for less-capitalized vendors)
9.	Efforts that **expand the pipeline for greater diversity among investment advisors** (if applicable) **and vendors**

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	10. Systematic processes for board, staff, advisors, vendors to become **racial equity-informed and competent** (e.g., orientations, training)
	11. **Payment processes** that recognize that different organizations/businesses are differently situated financially

D. Has the organization implemented DEI practices in programmatic areas? (6 indicators)

	1. Programming that systematically **accesses the perspectives** of diverse constituent groups (e.g., annual consultative sessions with diverse groups)
	2. Programming that comprehends **the ways in which racial inequities are produced and maintained** (e.g., utilizes backmapping regularly)
	3. Programming that incorporates **partners' ability to advance racial equity** into partnership decisions
	4. Programming **that appreciates the ways in which various potential partners are differentially situated** because of the legacy of discrimination (e.g., invests in historically undercapitalized organizations that have deep reach and respect in diverse communities)
	5. Organizational **advocacy/use of civic capital** to advance racially equitable mission-relevant outcomes
	6. **Systematic collection, disaggregation, and publication of data** on results, with a dedicated focus on closing racial gaps

E. Does the organization utilize accountability mechanisms to monitor racial equity? (12 indicators)

	1. **Systematic collection, disaggregation, and publication of data** on board, staff, advisor, vendor diversity
	2. **Analysis of above data** to understand how to close gaps where disparities appear
	3. **Systematic application of a racial equity impact analysis** to all key operational decisions
	4. **Systematic application of a racial equity impact analysis** to all key programmatic decisions
	5. **Systematic application of a racial equity impact analysis** (or similar tool) to organizational communications.
	6. **Routine assessment of communications and products** for appropriate messaging
	7. Mechanisms for **senior management accountability** for racial equity performance
	8. Mechanisms for **staff accountability** for racial equity performance
	9. **Senior staffing position** dedicated specifically to racial equity (particularly relevant in larger organizations)
	10. Mechanisms for **investment advisor** (if applicable) **and vendor accountability** for racial equity performance
	11. Mechanisms for **partner accountability** for racial equity performance
	12. Incorporation of commitment, policy, procedures, performance expectations into **new staff/board/vendor/partner orientation**

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NEXT: The Summary Sheet BELOW can be used to create an overall plan for embedding racial equity across organizational work.

SUMMARY SHEET FOR BEST IN CLASS INDICATORS

INSTRUCTIONS:

After each action step, indicate by when it will be taken and who will be responsible for leading the action. Revisit the overall plan you develop in Action Step 7 on a regular basis to record achievements and track accountability.

Action Step	Date for Achievement	Accountable Person(s)
1.Administer the tool in your unit/ organization		(Managers)
2.Determine level of agreement around assessments		(Managers)
3.Enumerate and acknowledge what you've already accomplished (5,6 scores)		(Managers)

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4.Identify what's being done regularly that needs to be hardwired (5 scores)	(This can easily be done at the time the group determines its summary ratings.)	
5.Identify what's being done episodically that can become routine (3,4 scores)		
6.Identify areas where work needs to start (2 scores)		
7.Develop an overall plan and sequence for the identified steps above, with timelines		(Managers)
8.Identify how everyone will stay informed about what's happening		(Managers)
(List other actions as needed)		

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