

Charities Review Council's

# Diversity, Equity & Inclusion Toolkit

## Project Champion Guide



The DEI Toolkit is brought to you by Charities Review Council, with support from Blue Cross and Blue Shield of Minnesota, Curtis L. Carlson Family Foundation, Target, Wells Fargo Foundation, Youthprise, Medica, Cargill, Imagine Deliver, Sida Ly-Xiong Consulting, Alto Consulting, and hundreds of Charities Review Council's nonprofit partners

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## **Additional Resources**

A complete list of Survey Questions, a Glossary of Terms, and a list of References are available for download on your Project Champion Dashboard.

## **Questions?**

You can direct your DEI Toolkit questions to [toolkit@smartgivers.org](mailto:toolkit@smartgivers.org).

# Welcome, Project Champion!

You are a trusted leader—one that is ready to help your organization implement Charities Review Council’s Diversity, Equity & Inclusion (DEI) Toolkit. **Think of yourself as an internal consultant with the job of:**

- facilitating your organization’s successful completion of the assessment,
- guiding your organization’s people through understanding results, and
- setting goals for how your organization will act on what you learned.

The DEI Toolkit will do most of the heavy lifting online, but you will manage the pace of this process for your organization, help your organization understand its results, and set goals to keep propelling your team forward.

This Project Champion Guide will walk you through the steps of the assessment process, with additional instructions, tips, and optional activities to use with your organization along the way.

**Ready to get started? Let’s go!**

# Diversity, Equity & Inclusion Toolkit: An Overview

The Diversity, Equity & Inclusion (DEI) Toolkit is for organizations that want to build a more effective and reflective organization from the inside-out. The DEI Toolkit is an affordable and accessible self-administered assessment tool with learning resources, guided reporting, and goal-setting all built-in.

The DEI Toolkit is designed to assess and strengthen three important areas of any organization or system:

- **People**, which reflects an organization's **diversity**;
- **Processes**, which demonstrates an organization's culture of **inclusion**; and
- **Power**, the structures that show how an organization makes decisions that lead to greater **equity**.

Organizations should use this assessment to understand their own internal diversity as compared to the community they serve; to clarify roles and responsibilities toward creating and maintaining equity and inclusion; and to set organizational priorities to enhance diversity, equity and inclusion.

**Don't worry. There's no grade at the end—that's not the point.**

Instead, your only goal as an organization is to work towards greater self-awareness and constant improvement—with the end goal of building a better future for everyone.

# The Project Champion Checklist

Pages 6 –18 of this Project Champion Guide will walk you through the steps listed in this checklist.

## Before the Assessment

- Prepare your Organization's Leadership
- OPTIONAL: Recruit an Executive Advocate
- OPTIONAL: Facilitation Guide: Diversity, Equity & Inclusion in Your Context
- Gather Your List of Survey Respondents
- Communicate the DEI Toolkit's Priority to Key Partners

## During the Assessment

- Set Up Your Survey
- Distribute Links to Your Survey
- Check Progress: Track Your Survey Responses
- OPTIONAL: Personalize Reminder Email Template: Give Respondents a Nudge

## Review the Results

- Review Assessment Results
- Share Results with Leadership
- Leadership and/or Project Champion Host Results Conversation
- Record Notes & Feedback

## Determine Next Steps

- Set 3 Goals
- OPTIONAL: Use Goal Setting Matrix to Prioritize Goals
- Save Your Goals Online

# Prepare Your Organization's Leadership

A prepared organization starts with prepared leadership. For that reason, you will be successful when leadership demonstrates internal support for participating in the DEI Toolkit from the top-down. The way to prepare leadership (and in turn for leadership to prepare staff) depends almost entirely on your organization. You know your organization best—support your leaders in creative ways that match leaders' needs and styles.

## OPTIONAL: Designate an Executive Advocate

One way to ensure progress and support for this work is to designate what we call an **'Executive Advocate'**—someone who will be your partner in making this work a priority. The Executive Advocate should be a leader who peers and subordinates respect. This person should be trusted by colleagues representing diverse backgrounds and also enjoy a proven track record in the workplace.

Once you've identified a potential Executive Advocate, set a short meeting to introduce them to the DEI Toolkit and invite them to serve in this role. Tell that person why you chose them!

**TIP:** If you'd like to give your Executive Advocate access to the administration of the DEI Toolkit online, assign them as an additional **Project Champion** or **Results Analyst**.

When your chosen Executive Advocate agrees to help, kick off the work together by talking through the following questions in partnership. You can record your answers here:

- **Why is assessing and understanding our organization’s diversity, equity, and inclusion an important step in moving our work forward as an organization?**
- **How can we clearly and transparently communicate why we are assessing diversity, equity, and inclusion at our organization and what we will do with the data?**
- **How can we communicate this work as a priority to staff and other formal and informal leaders?**
- **What barriers might we anticipate as we move through this process? How can we overcome those barriers together?**
- **How might we build a brave and safe space for our organization’s board, staff, and community to take the survey and take action around our results?**

Use these answers to inform communications and customize next steps.

## Need to get everyone on the same page?

Facilitate a conversation with your leadership to understand your unique context.

Use our Facilitation Guide to help guide your conversation.

### FACILITATION GUIDE



#### Diversity, Equity & Inclusion In Your Context

##### ARE WE PROACTIVE OR REACTIVE?



Are we approaching this Toolkit and other Diversity, Equity & Inclusion efforts from a position of strength or one of challenge? Has a particular event moved this work up on our priority list? How risk-ready are we? Do we tend to lead change or follow change?

##### ARE WE HETEROGENOUS OR HOMOGENOUS?



Do we have a dominant culture? What is our racial diversity like? How successful have we been at retaining talent of color or people from other traditionally disinvested communities? How might we handle conflicts that arise as a result of our Diversity, Equity & Inclusion efforts? How will we protect and support diverse stakeholders as we move through this effort?

##### ARE WE ASSET RICH OR CONSTRAINED?



What is our history in committing resources to Diversity, Equity & Inclusion efforts? What is our ability to commit resources to these efforts? Are we in a position to dedicate human hours and financial resources towards supporting personal growth and organizational development around Diversity, Equity & Inclusion?

*Every organization is unique. Leading a facilitated conversation around these three areas with your group's key leaders will help you understand your Diversity, Equity & Inclusion landscape and communicate about distinct learning priorities in an authentic way. It will also help align expectations for what actions could emerge as next steps.*



# Gather Your List of Survey Respondents

## How Many Survey Respondents Do We Need?

How many survey participants you decide to engage is a function of your organization's size, but most organizations will survey between 40 and 200 people. The DEI Toolkit does not limit you to a specific participant number but does require a minimum of 12 responses before you can see the results and 6 responses for each group (i.e. Board, Staff, Participants) before the results are broken down by group.

## Who Should We Survey?

We recommend your organization survey the full Board of Directors (or other governance equivalent) and all paid and unpaid staff members as a **minimum** threshold for participation.

However, the DEI Toolkit is designed for your organization to do much more than just survey those closest to you. In fact, we think you'll learn a lot from the perspectives of your partners, collaborators, donors, volunteers, clients, and others. In addition to board and staff, consider also inviting folks from the following groups to respond to the survey assessment:

- Committee Members
- Consultants & Contractors
- Volunteers
- Vendors
- Collaborators & Partners
- Donors
- Funders
- Interns
- Clients
- The Community You Serve

# Communicate with Key Partners

Hosting conversations with staff (or among leadership) is a great start to having a successful assessment experience. Next, your organization should communicate more broadly to let folks know you're about to ask them to share their experience of diversity, equity, and inclusion as it relates to your organization. Not only will sharing a note in advance help folks feel informed, but they will also know what to expect when the survey arrives in their inboxes.

In more formal institutions, the President or CEO often serves the role of communicating strategic priorities. In some work cultures it would be completely acceptable for the Project Champion or the Executive Advocate to be the one reaching out to let people know that a survey is about to land in their inbox. Who sends this communication is completely up to you.

## Sample Email to Key Partners

We've created a sample email for you to customize to fit your organization's specific needs.

**Subject Line:** Learning About Our Diversity, Equity & Inclusion

Dear Close Friends of [Organization Name],

I'm reaching out to let you know that our organization will soon deploy Charities Review Council's Diversity, Equity & Inclusion Toolkit to learn more about how our people, processes and decision-making structures reflect the community we serve. This is an important priority to us because [share a reason that makes sense for your organization].

**To that end, you will soon receive an email that includes a link to a survey about our organization.** We will be sending it to [share the groups you will be sending it to (e.g. board, staff, volunteers and collaborators)] in order to capture as many perspectives as we can.

Your unique perspective matters to us. While participating in the survey is not mandatory, we hope you will feel welcome to share your full experience of our organization. The survey is anonymous, and no identifying characteristics will be linked to your answers.

**We hope to have all surveys completed by [insert date], so please keep an eye out for the survey email [insert timing of survey distribution] and fill it out as soon as you are able.**

In the meantime, to learn more about Charities Review Council's Diversity, Equity and Inclusion Toolkit, follow this link: <http://smartgivers.org/nonprofits/diversity-equity-inclusion-toolkit/>.

With gratitude,

[Sender Name]

# What Survey Respondents Can Expect

We make the assessment as easy as possible for your survey respondents. Once you setup and distribute the assessment online, your respondents can expect the following:

- To receive a unique link to the survey that they can access from any computer or mobile device. **They should save this link until they have completed the survey.** This is their access point to the survey.
- Their responses save automatically, and they can take the survey all at once or in pieces at their own pace.
- It will take them 20–30 minutes to get through the survey from start to finish.
- If they don't complete the whole survey right away, you can generate friendly reminders through our system so you don't miss out on their valuable answers.
- If survey respondents choose not to complete a survey, their link will expire at the end of your survey timeframe.

## Distribute Your Survey

Once you have your list of respondents and their email addresses, you can set your survey timeframe from the **“Survey Setup”** page within the DEI Toolkit. When you are ready to distribute the survey, go to the **“Manage Respondents”** page in the DEI Toolkit and select your survey. There are then two ways you can send out your survey:

1. You can input each of the email addresses one at a time. The DEI Toolkit will send an automated email with a survey registration link to each address you enter.
2. **Recommended**, especially for larger lists of email addresses: Copy the survey registration link provided in the DEI Toolkit (see image below) and send it to your constituents in a custom email message. (**Note: Make sure to BCC the recipients, send the message via mail merge, or use a mass email platform** so your recipients don't all see each other's email addresses!)

**Invitations**

If you plan on sending out your own invitations for survey participation to responders, be sure to include the link below in your communication so they can register. Once they have registered, they will be sent additional information on how to begin taking the survey.

<https://deitoolkit.smartgivers.org/surveys/surveyregistration.aspx?osid=46574486-2464-4133-8675-072909389446>

If you would like to send a single invitation to an individual to participate in the selected survey, enter their email address below and select the *Send Invitation* button. We will send them an email with the link to register.

Email Address:

**Send Invitation**

## If your respondents are slow to click submit, don't worry.

You can trigger an email reminder in the DEI Toolkit. On your **"Survey Setup"** page, you'll have the option to decide when survey respondents get reminders and how long they have to submit their responses. If respondents don't want to participate, or if they don't submit the survey within the designated timeframe, their survey link will expire after the submission deadline.

**Reminders**

If you would like to send email reminders to respondents that have not yet submitted the selected survey, select the *Send Reminders* button below.

**Send Reminders**

Even with automated reminders, you might find that a more personal nudge from leadership is helpful. Below, you'll find a sample email that you can customize and share inviting participants to complete their survey.

**TIP:** Sending a final customized email reminder is a perfect job for your organization's Executive Advocate!

## Sample Email Reminder

**Subject Line:** Action Requested: Please Complete Your DEI Toolkit Assessment Survey

Dear Close Friends of [Organization Name],

**I'm reaching out as a final reminder to complete the Diversity, Equity & Inclusion Toolkit Survey we sent you on [insert date].** We sent this assessment to all of our valued partners including [list types of groups you surveyed—board, staff, volunteers, partners, funders, etc.].

Your unique perspective matters to us. While participating in the survey is not mandatory, we hope you will feel welcome to share your full experience of our organization so we can learn and grow. The survey is anonymous, and no identifying characteristics will be linked to your answers.

**We hope to have all surveys completed by [insert date], so please complete it at your earliest convenience as that date is quickly approaching.** To complete your survey, access the original email sent to you from the Diversity, Equity & Inclusion Toolkit and click the unique link—if you already started your survey, the answers you recorded are saved there.

Thanks for your consideration and partnership,

[Sender Name]

# Analyze Your Results

Once more than 12 respondents have submitted their surveys (you won't be able to see results until at least 12 people have taken the survey—this ensures their privacy), the DEI Toolkit will generate a customized report.

## Your customized report enables you to:

- Compare your organization's demographic representation to the demographics of the community your organization's work serves.
- Identify which processes and practices have the highest or lowest average scores or biggest differences in scores when compared by board, staff, program participants, or partners.
- Discuss the amount of involvement board, staff, program participants, and partners have in making decisions and influencing outcomes at your organization.

View your results on the **"View Results"** page of the DEI Toolkit. You can also download a PDF of the results by clicking **"Download Results"**.

# Understand & Discuss Your Results

As you and your organization use the DEI Toolkit's report to work through the answers it uncovers, reflect upon the following questions:

- What surprised you?
- Did you notice any trends?
- Which of these questions seemed more applicable to us as we think about advancing diversity, equity, and inclusion at our organization?
- Who do we work *for* and who do we work *with*?
- Is there a balance across the organization's levels and areas?
- When and how do we engage each other?
- How well do we manage conflict and tension?
- Do we intentionally develop and support people in their roles?
- Who knows? Who acts? Who decides?

Being intentional in your communication throughout the assessment will also help set expectations for next steps.

**TIP:** While reviewing the results, people may wish to add context, stories, and examples to enrich the collected responses. As the Project Champion and Executive Advocate, you'll want to think through how you can create a safe space for all participants to share their thoughts and priorities as freely as possible.

# Set Organizational Goals

Most organizations will learn something valuable in all three areas of the assessment: **People**, **Processes**, and **Power**. Based on survey responses and notes from group discussions, identify organizational goals that can and should be addressed.

**TIP:** We recommend brainstorming at least 1 goal for each area of the assessment (People, Processes, and Power) as a team—that's a minimum of 3 organizational goals in total.

As you facilitate goal setting, keep in mind current and expected levels of involvement from each group (board, staff, program participants, and partners). Make sure that each group is appropriately welcomed in giving input.

## **In setting your goals, make sure you ask and answer the following questions:**

- What is our timeline for this goal?
- How will we know we've achieved it?
- What happens once we meet this goal?
- Who will be responsible for keeping us on track to meeting this goal?

## **Remind yourselves of your organizational context as you brainstorm goals:**

- Which voices within our organization should we be listening to, lifting up, and making space for as we do this part of the work? How will we actively lift, listen, and make space?
- Which pressing issues, if any, must resolve as a result of this learning?
- What can (and can't) we achieve right now? Why or why not?
- How can we include these goals in our work plans so that we can actively work toward them?

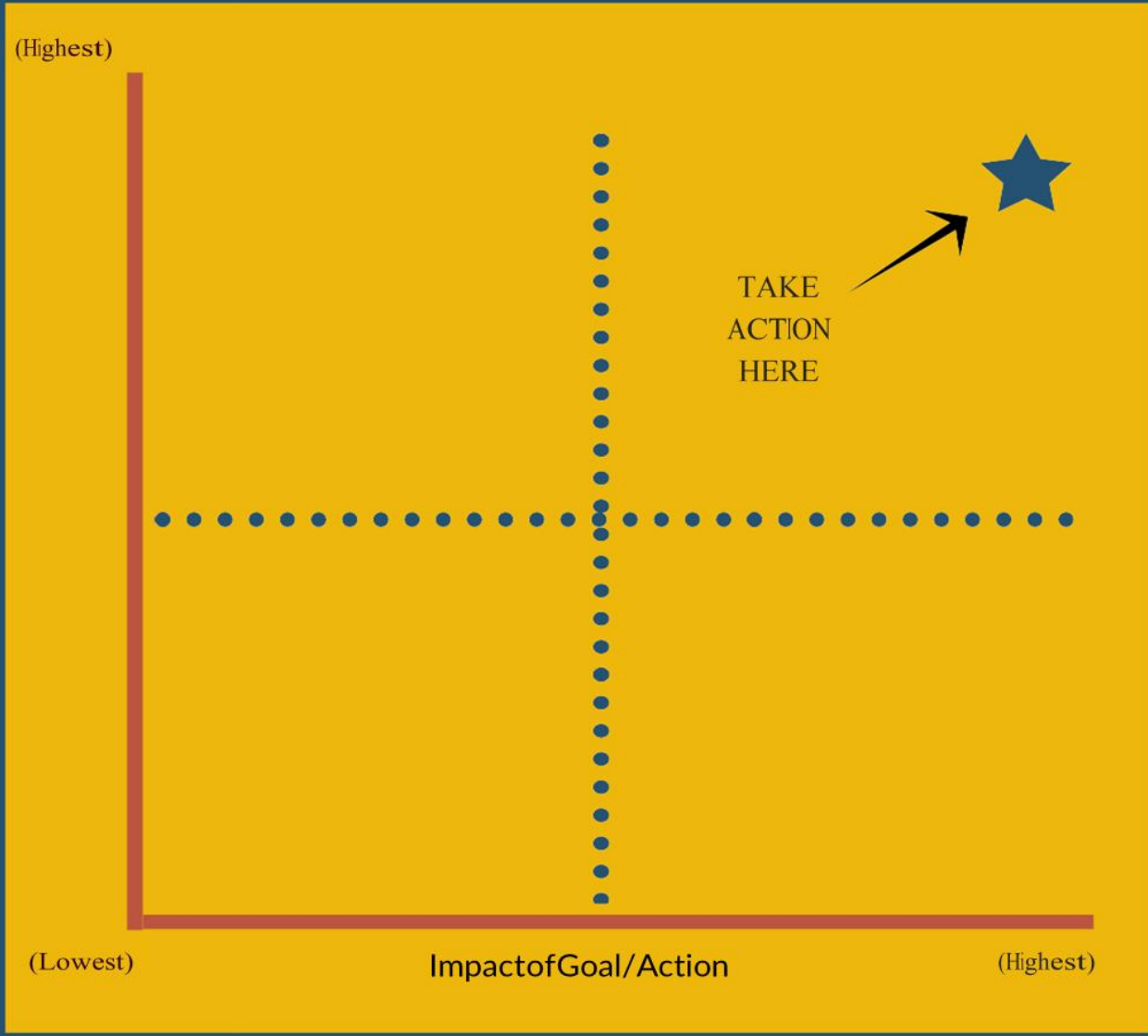
Use the Action Planning Matrix on the following page to chart your Top 3 goals (1 goal for People, 1 for Processes, and 1 for Power). It will help you gain consensus and be transparent about priorities with your group.



# GOALSETTING: MAP YOUR PRIORITIES



*Diversity, Equity & Inclusion Toolkit: Action Planning*



*Every organization is unique. Once you've viewed and talked about results with your group, brainstorm at least 3 goals for each area: People, Processes and Power. Then, map your goals on this matrix to determine your priorities as a group.*

# Record Your Top 3 Goals

Once you've prioritized your goals, go to the **"Setting Goals"** page in the DEI Toolkit to enter your goals and action steps. You can be as detailed as is helpful for you and your organization. You can save your goals online in the DEI Toolkit and/or print your goals to distribute to the team.

# Plan for Future Assessments

In order to track progress toward goals, we recommend administering the DEI Toolkit survey assessment annually. Set a future date now for a kick-off planning meeting next year. Your future self will thank you!