

Organizational Assessment

Purpose

In our collective workplaces and organizations, we often state the fundamental principles of respect and equality for all. Core values of any organization usually list 'diversity', 'respect' and 'inclusion' within statements of mission and purpose. However, values are much more than words, and to truly embed these values into the structure and life of any organization requires honest examination and evaluation.

To assist an organization, and the individuals within an organization, in the progressive journey towards diversity and inclusivity, this self-assessment tool is meant to facilitate reflective conversations around "how we are doing" and "what we could be doing". It is meant to springboard assessment conversations toward meaningful and continuous action. It is meant to inspire mindfulness and responsiveness. It is not meant to feel competitive, in that high scores are the only objective. Additionally, a high score does not mean that equity and inclusion work is finished. This tool is not an exhaustive checklist and it will constantly evolve and change as the field of equity, diversity and inclusion develops over time and our learning journeys progress.

Directions

Evaluate agency behaviors in the following areas:

- Foundation: how does your agency promote diversity and inclusion when creating a positive customer experience
- Leadership: how are you, as leaders, setting the example for how front-line employees provide service to a diverse community
- Service Delivery: how does your agency promote input from diverse populations
- Communication: how does your agency make information available to diverse community groups
- Performance Improvement: how does management incorporate diversity when analyzing ways to improve service

Rate your agency using the following scale:

- 3 – Substantial actions have been taken and there is good evidence
- 2 – Actions have started or are in progress with some evidence
- 1 – Action is intended and conversations or planning has begun
- 0 – No action, conversations, or planning has taken place

1) ORGANIZATIONAL FOUNDATION

INDICATORS	EVIDENCE	ACTIONS PLANNED	SCORE
a) Diversity and inclusion are embedded within the mission and strategy, and are key values.			
b) All levels of the organization (e.g. Board of Directors, leadership, staff and volunteers) demonstrate that diversity and inclusion are aligned with the mission and vision.			
c) All levels of the organization (e.g. Board of Directors, leadership, staff and volunteers) reflect the diverse community.			
d) Organizational policies and strategic planning have included input from stakeholders and is communicated to stakeholders.			
e) Outcomes in implementing inclusion practices are promoted, measured, analyzed and reported on regularly for the purpose of improvement and transparency.			
f) Organizational culture provides a positive experience and welcoming, inclusive environment for both employees and customers.			

2) LEADERSHIP

INDICATORS	EVIDENCE	ACTIONS PLANNED	SCORE
a) Senior leaders are role models in their discussions and actions in diversity and inclusion practices.			
b) Leaders support and are actively involved in equity and diversity networks in the community.			
c) Leaders encourage inclusion ideas recommended by employees, volunteers, persons served, and stakeholders.			
d) Leaders respond to challenging discussion issues about equity.			
e) Leaders ensure that policies, including policies and practices of inclusion and equity, are communicated staff and community being served.			
f) Leaders are equipped with or provided training on the inclusive leadership skills needed for diverse work teams.			

3) SERVICE DELIVERY

INDICATORS	EVIDENCE	ACTIONS PLANNED	SCORE
a) Facilities are accessible and allow all users to have full access to services.			
b) Accessible customer services policies and practices allow people to be served with independence, dignity, integration and equality of opportunity.			
c) Community consultation and stakeholder input is encouraged and analyzed for equity practices within current services and proposed services.			
d) Passenger input mechanisms such as surveys or ratings/measures of services are used to establish needs and satisfaction levels of diverse group service users.			
e) Practices are in place to review the implications for diverse group service users or prospective users, in order to increase, decrease, or reallocate resources.			

f) Written procedures are in place to monitor complaints, comments or suggestions regarding service delivery.			
g) Contracts or partnerships with external organizations or suppliers include requirements to deliver services equitably and without discrimination, and systematic checks ensure that there are no discriminatory practices.			

4) COMMUNICATION

INDICATORS	EVIDENCE	ACTIONS PLANNED	SCORE
a) Current community demographic data is made available throughout the organization.			
b) The commitment to diversity and inclusionary practices is actively endorsed regularly to the public and to stakeholders through all forms of communication.			
c) Mechanisms have been established to ensure and enhance communications available in languages, based on relevant demographic information.			
d) Outreach and public events positively reflect diversity.			
e) Information, publications, and visual or written portrayals of individuals or groups are inclusive, written in plain language and portray positive, inclusive images.			
f) Demographic data is collected for the purposes of improving services in all areas of the community.			

5) PERFORMANCE IMPROVEMENT

INDICATORS	EVIDENCE	ACTIONS PLANNED	SCORE
a) Leadership develops a performance management framework, such as a Diversity and Inclusion Improvement Plan, and regularly reviews, tracks and updates it for the purpose of advancing equity objectives.			
b) There is an Accessibility Plan, which identifies barriers that may prevent populations or individuals from accessing services, and lists actions for the reduction/elimination of barriers.			
c) Equity, diversity and inclusion work is embedded in staff performance reviews.			
d) Changes in service schedules or delivery models are evaluated to ensure nondiscrimination.			

SUMMARY - How is the organization performing across all areas of responsibility?

AREAS FOR SELF-ASSESSMENT	SCORE	NOTES OR ACTIONS PLANNED
1) Organizational Foundation		
2) Leadership		
3) Service Delivery		
4) Communication		
5) Performance Improvement		

FURTHER IMPROVEMENT - Some areas may require further attention and a developed action plan.

Additional resources can assist in moving the organization forward towards practical solutions to better serve individuals and diverse communities.

The template below is an example of tracking improvement goals and measures.

GOALS	MEASURES OF SUCCESS	PERSON(S) RESPONSIBLE	TIMELINE