



DIVERSITY EQUITY INCLUSION **TOOLKIT**

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PROJECT CHAMPION USER GUIDE

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





WELCOME PROJECT CHAMPION!

If you are reading this, you are a trusted leader— one that is ready to help your organization implement a first-of-its-kind Diversity, Equity & Inclusion Toolkit assessment. The Toolkit is designed to be an automated do-it-yourself application to help your organization assess and understand how it can improve the way it communicates and supports its employees and customers.

You are about to oversee moving your organization through this process. Think of yourself as an internal consultant, with the job of facilitating your organization's successful completion of the assessment, guiding your peers through understanding results, and setting goals for how your organization will act on what you learned.

We'll do most of the heavy lifting online, and you'll come in for being an advocate for this process and its results. We will manage the pace of this process for your organization, helping you every step along the way. This is the first step in propelling your organization forward.

This Project Champion Guidebook will help you walk through the steps of the assessment process, with easy to read instructions and optional activities to use with your organization along the way.



Ready to get started? Let's go!



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Diversity, equity, and inclusion are benchmarks of an organization’s health, capacity to lead and commitment to internal employees and external customers. Diversity, equity, and inclusion are benchmarks of an organization’s health, capacity to lead and commitment to internal employees and external customers.



A SHORT TOOLKIT OVERVIEW

The Diversity, Equity & Inclusion Toolkit is a unique, guided assessment designed for non-profit and for-profit organizations that wish to build a more effective and inclusive organization from the inside-out. We work with companies in all stages of growth to help them understand how their organizational ecosystem measures up to itself in terms of its people, processes, and power.

Reflective of its answers, our approach gives you actionable feedback and dialog to start to create meaningful change. In fact, your only goal as an organization is to work towards greater self-awareness and constant improvement.

This Toolkit has three distinct parts and is intended to assess three important components of an organization or system: people, processes, and power.

A full list of the Diversity, Equity & Inclusion Toolkit's assessment questions can be found at the back of this User Guide and are available for download on the Project Champion Dashboard.

WHAT YOUR ORGANIZATION CAN EXPECT

Every organization or business has something to learn from this Toolkit. We know how an organization reflects the employees it hires and the customers it serves is never ‘one size fits all.’ Instead, knowing your organization, what it looks like, and how it operates best - and then reflecting that in an authentic and trustworthy way - is what matters to being effective and accountable.

Your organization might never have had a formal conversation about diversity or equity before. On the other hand, people from traditionally disinvested communities might already be leading the way from within your organization. You might even be focused on building racial equity or economic justice full-time as part of your mission. That’s great – but you’ll still learn something, we promise!

No matter where your organization is in its journey, the Diversity, Equity & Inclusion Toolkit can give you important information about the people you engage and the ones you serve; about your formal processes and also about your informal work culture; it will even give you insight into how decisions get made and how power gets shared.

If you are confident that you are already leading the way - the Diversity, Equity & Inclusion Toolkit will help you tell that story of strength and demonstrate your competitive advantage.

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 receive a unique link to the survey that they can access from any computer or mobile device. 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 your organization’s survey from start to finish. If they don’t complete the whole thing right away, you can generate friendly reminders through our system so you don’t miss out on their valuable answers if they get diverted and forget to come back. If survey respondents choose not to complete a survey, their link will expire at the end of your survey timeframe.



PROJECT CHAMPION

Step-by-step Checklist

Pages 7-15 of the Project Champion Guidebook will walk you through the steps listed in the checklist below. Set timeline goals in the margins. Check items off as you complete the tasks to make sure it all gets done.

Before Assessment

- Leaders Are Ready
- Recruit an Executive Advocate (Optional)
- Leaders Share This Priority with Participants
- Facilitate Conversation: Understanding Your Context (Optional)
- Compile List of Survey Respondents

During Assessment

- Set Up Your Survey
- Distribute Links to Your Survey
- Check Progress: Track Your Project Champion Dashboard Daily
- Personalize Reminder Email Template: Give Respondents a Nudge (Optional)

Analyze & Understand 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 with Your Group
- Use Goal Setting Matrix to Prioritize Goals (Optional)
- Save Your Goals Online

PREPARE YOUR ORGANIZATION' S LEADERSHIP

A prepared organization starts with prepared leadership. As a generality, an organization is only as ready for Diversity, Equity & Inclusion work if its leaders are. For that reason, you will be successful when leadership demonstrates internal support for participating in the 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. Feel free to support your leaders in creative ways that match leaders' needs and styles.

Build Support: 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 leader-partner in making this work a priority during in-person Diversity, Equity & Inclusion Toolkit related activities. This role involves a much 'lighter lift' in terms of time than the Project Champion role does, but it is one that can help leverage influence from within your organization.

Ideally, the Executive Advocate should be a leader who is both trusted by colleagues representing diverse backgrounds, and also enjoys a proven track record in the workplace. Both peers and subordinates will respect this person.

*Small organizations: No staff to spare?
Invite the whole staff or board to serve
the role of Executive Advocate!*



Set a short meeting with your chosen Executive Advocate, introduce them to the Toolkit and invite them to serve this role. Tell that person why you chose them!

When your chosen Executive Advocate agrees to help, kick off the work together by talking through the following questions in partnership:

- Why is assessing and understanding our organization's diversity, equity and inclusion profile an important step in moving our work forward as an organization?
- How can we communicate this 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 to take the survey and act 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 on the next page.



FACILITATION GUIDE

Diversity, Equity & Inclusion In Your Context



Are we proactive or reactive?

Are we approaching this Toolkit and other Diversity, Equity, and Inclusion efforts from a position of strength or one of challenge? Has a particular event moved this work up 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 dominate 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, and 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, and 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, and 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, and 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 RESPONDENTS

Your internal leadership is ready. You've set your communications plan in motion. The next step is to gather your list of respondents.

How Many Survey Respondents Do We Need?

How many survey participants you decide to engage is a function of your organization's size, many organizations survey more than 5,000 people.

The Diversity, Equity & Inclusion Toolkit does not limit you to a specific participant number. You will learn the most from your data if you have at least 12 respondents, with 6 members of each participant group responding (your results won't show up until you've surveyed at least 12 people to protect participant privacy), but we recommend you get as much of your organization involved as you can.

Who Are Our Survey Respondents?

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 Diversity, Equity & Inclusion 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, consultants, donors, vendors, clients, customers, and others.

In addition to board and staff, consider inviting folks from the following stakeholder groups to also respond to the survey assessment:

- Employees
- Consultants
- Partners
- Clients
- Customers
- Vendors



COMMUNICATE THE TOOLKIT'S PRIORITY TO PARTICIPANTS

Hosting a small group conversation with staff (or among leadership) is a great start to having a successful assessment experience.

Next, your organization should communicate a bit more broadly to let folks know that you're about to ask them to share their experience about Diversity, Equity & Inclusion as it relates to your organization.

Often, 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' you designated earlier 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.

Sharing a 'preview' with staff and other important participants about why your organization is embarking on the Diversity, Equity & Inclusion Toolkit ahead of time is important – and demonstrates transparency and openness. That way folks will feel informed and on board. Your people will know what to expect when surveys arrive in their email inboxes.



EMAIL FOR COMMUNICATING WITH PARTICIPANTS

We thought you might be wondering what to share with folks in your network ahead of time. We've created a sample email below for you to customize to fit your organization's specific needs.

Email Subject: Learning About Our Diversity, Equity & Inclusion

Dear Team Members / Partners,

I'm reaching out to let you know that our organization will soon deploy our Diversity, Equity & Inclusion Toolkit initiative to learn more about how our people, processes and decision-making structures reflect both those on our team and the customers we serve.

To that end, you will soon receive an email that includes a link to a survey about our organization/company. We will be sending it to [share the participants you will be sending it to (e.g. board, staff, customers, and vendors)] 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 our new Diversity, Equity and Inclusion Toolkit, follow this link: <https://deitoolkit.com>.

With gratitude,
[Sender Name]

DISTRIBUTE YOUR SURVEY

Once you have your list of respondents and their email addresses (make sure you save all the emails in one place), you can set your survey timeframe and distribute unique survey links to each participant from the Survey Setup page on the Project Champion Dashboard.

Sending out your surveys is super easy. No need to create and track individual emails. We do the heavy lifting for you.

Just go to your survey on the Dashboard and input the email addresses you've gathered. An email with a link will be sent to your participants from your organization's Diversity, Equity & Inclusion Toolkit account. Rest assured: their information is fully protected using HIPAA compliant encryption from survey start to finish.

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

You can trigger an email reminder in the Diversity, Equity & Inclusion Toolkit system. 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.

Even with automated reminders, you might find that a more personal nudge from leadership is helpful.

Customize and share the template email on the following page so you and your leadership can invite participants to finish up their surveys. Hint: sending a final customized email reminder is a perfect job for your organization's Executive Advocate!

Learn more about designating an Executive Advocate on Page 7 of this guide.



EMAIL REMINDING PARTICIPANTS TO FINISH UP

Here is a handy email reminder template for your organization to customize and send to your list of respondents.

Email Subject: Action Requested: Please Complete Your DEI Toolkit Assessment Survey

Dear Team Members / Partners,

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 participants including [list types of participants you surveyed – board, staff, customers, vendors, 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 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 if you haven't already. 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,
[Sender Name]

ANALYZE 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 right to privacy), the Diversity, Equity & Inclusion Toolkit will generate a customized report that is tailored to your participants' responses.

View and print your results on the 'Results' page of the Project Champion Dashboard.

Your customized report enables you to:

- Compare your organization's demographic representation by board, staff, program participants and partners.
- 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 of Directors, staff, program participants and partners have in making decisions and influencing outcomes.

UNDERSTAND & DISCUSS YOUR RESULTS

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

- Who do we work for and with?
- Is there a balance across the organization's levels and areas?
- When do we engage each other?
- How well do we manage conflict and tension?
- Do we intentionally develop and support people in their roles?
- How inclusive are we to those with different beliefs, backgrounds and perspectives?

In this type of assessment, it is important to keep in mind that the results can deepen understanding as well as knowledge.

Hint: Start with reflection about any results that surprised you or that may signal new trends. Which of the questions seemed more applicable to you as you think about advancing diversity, equity and inclusion in your organization? Which questions have you not asked yourself in a while?

Some groups may wish to do this with their own group first and then in a discussion with the other participants – other groups may not wish to participate in this phase of the work. Give people opportunities for sharing and reaction that are appropriate for their roles. For best results, - and to be aware of intra-group power dynamics - customize your conversation with each group.

Likely, respondents have had some previous communication and relationship with your organization. Put these findings in context. Consider how respondents may have informed your work/organization before this assessment and whether that is reflected here. Where might you expect to see previous input reflected in this assessment?

Being intentional in your communication throughout the assessment will also help set expectations for next steps. People may wish to add context, stories and examples to enrich the collected responses, and as Project Champion, 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 given your unique context.

SET ORGANIZATIONAL GOALS

Think about the organization you are a part of and are working to strengthen, engage, and create. Is this organization well represented in your people, processes, and power dynamics? Authentic leadership incorporates group wisdom and priorities. How can you enhance roles within and with your organization?

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

We recommend brainstorming ***at least*** 3 goals for each area of the assessment (People, Processes & Power) as a team – that’s a minimum of 9 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, etc). 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:

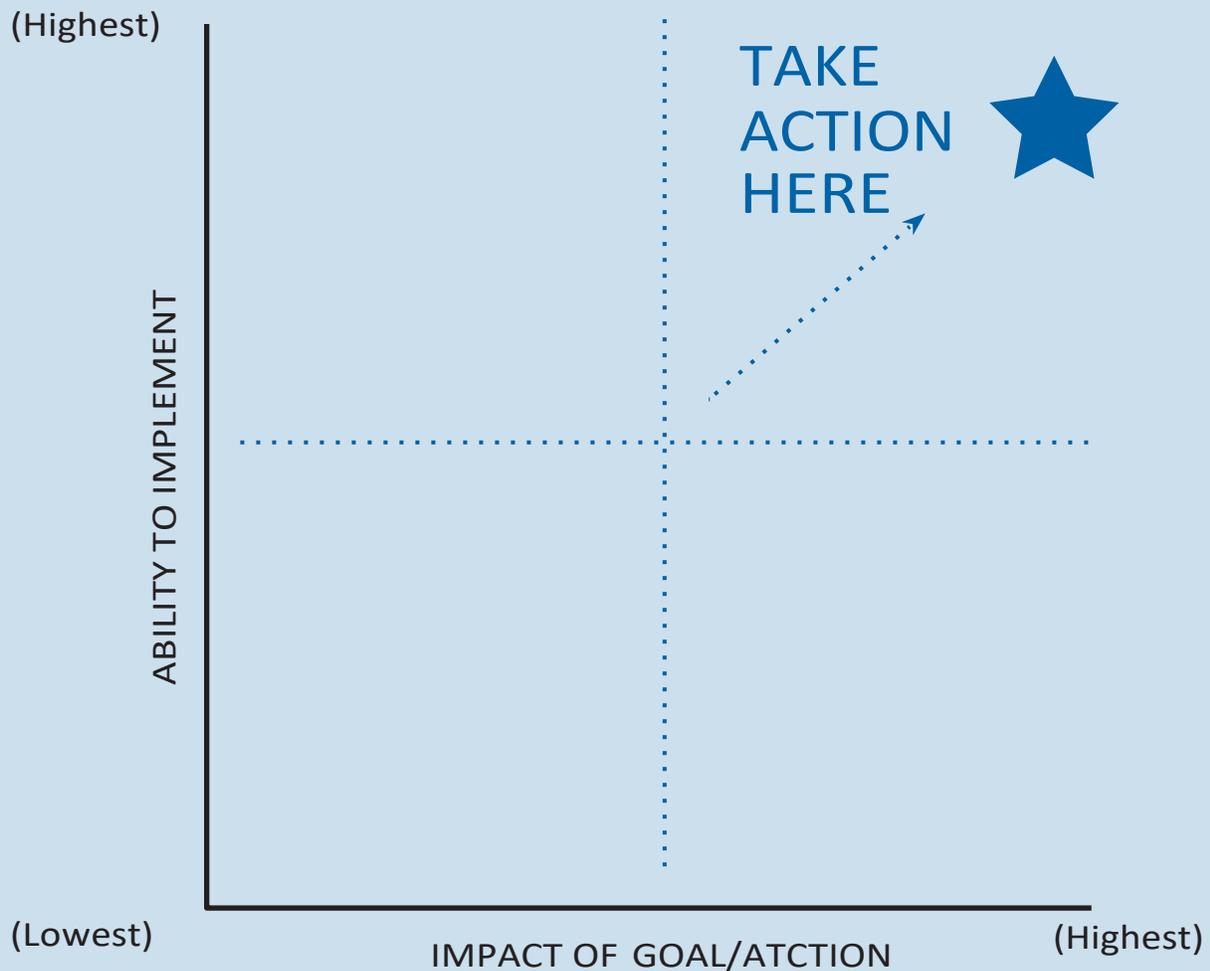
- Which voices within our organization should we be listening to, lifting up and making space for as we do this part of the work? How will we actively lift, listen and make space?
- Which pressing issues, if any, must resolve as a result of this learning?
- What can (and can’t) we achieve right now?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

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



GOAL SETTING

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 Goals page on the Project Champion dashboard. With your team, record your goal around each of the areas of the Diversity, Equity & Inclusion Toolkit assessment. Submit your goals, saving them for your organization to revisit later. The Diversity Equity & Inclusion Toolkit will format, brand and store the goals your organization sets. You can save and print them to keep with your data report for continued tracking and conversation.

People Goal:

Process Goal:

Power Goal:

Administer the Diversity, Equity & Inclusion Toolkit assessment again ANNUALLY. Repeat it with some or all participant groups for continuous improvement and greater accountability.



DEI TOOLKIT SURVEY QUESTIONS

SECTION	QUESTION
People–Who We Are	If you have ever had previous roles within this company, please check all that apply.
People- Who We Are	Check all racial or ethnic categories that apply to you:
People- Who We Are	What best describes your gender?
People- Who We Are	Is your gender identity the same as the sex you were assigned at birth?
People- Who We Are	How old are you?
People- Who We Are	What was your total household income last year?
People- Who We Are	What is your religious preference, if any?
People- Who We Are	Do you require any accommodations in order to fulfill your job responsibilities?
People- Who We Are	How well does your company strive to be inclusive to all types of people to work in your company?
People- Who We Are	Is your commute time a challenge?
People- Who We Serve	How well does your company support members of the LGBTQ+ community?
People- Who We Serve	What, if any, religious preference does your organization have either formally or informally?
People- Who We Serve	Does your company serve customers who require accommodations in order to enjoy or benefit from your products/services?
Processes	What racial or ethnic groups, if any, has your organization identified as priorities for your products and services?
Processes	How well does your company solicit ideas and priorities from multiple perspectives?
Processes	How well does your company collect feedback to improve its decision-making processes?
Processes	How well does your company communicate and collaborate with its vendors and partners?
Processes	How well does your company share information between departments and teams?
Processes	How well does your company value feedback from its employees?
Processes	How well does your company communicate feedback from its employees?
Processes	How well does your company value feedback from its customers?
Processes	How well does your company communicate feedback from its customers?
Processes	How well does your company take-action based on customer feedback?
Processes	How well does your company support your personal and professional development (e.g. training, advancement, promotion) opportunities?
Processes	How well does your company take-action on feedback from its team members?
Processes	How well does your company support, contribute or strengthen outside community efforts?
Processes	How well does your company encourage team members to take time for oneself during the day?
Power	How well does senior leadership build trust with team members?
Power	How well does senior leadership value and act upon feedback and ideas from team members?
Power	How well does the company encourage team members to be involved in the day-to-day decision-making?
Power	How well do team members build trust with each other within the company?
Power	How well does the company encourage team members to provide their ideas and opinions?
Power	How well does the company build trust with its vendors and partners?
Engagement: People	At this moment, how do you feel about working here?
Engagement: Process	At this moment, how do you feel about how well your supervisors listen to you?
Engagement: People	Today, how do you feel about how your work is valued by the company?
Engagement: People	At this moment, do you feel that your work is meaningful?
Engagement: People	At this moment, how do you feel about the quality and strength of your friendships and other personal relationships?
Engagement: Power	Today, how do you feel about your ability to safely express your ideas and opinions in the workplace?
Engagement: Process	At this moment, how do you feel about your career opportunities with the company?
Engagement: Process	What is your strongest feeling about how well your company communicates and keeps team members informed of objectives and progress?
Engagement: Power	What is your strongest feeling about how well your company includes team members in developing strategy?
Engagement: People	What is your strongest feeling about how well the company encourages team members to practice self-care throughout the day?
Other: People	How are you feeling today?