Equity* Planning Process Diagram

{Organizations Will Continuously Move Through This Process}

Conduct Equity Assessment of Current Practices

Establish an Understanding of Equity & Inclusion Principles Among Board and Staff

Continuously Evaluate Effectiveness and Adapt Strategies

Engage Affected Populations and Stakeholders

Implement the Equity Action Plan

Identity Strategies within an Equity Action Plan

Analyze Disaggregated Data & Conduct Systems Analysis of Root Causes of Inequities

*While this tool uses a racial equity framework, other equity frames can be added and/or substituted in the wording of the questions depending on your organization's context (e.g., rural, low-wealth, sexual orientation, gender identity/expression, immigration status, age, ability status, languages spoken, etc.)

Equity* Assessment Tool

Directions: For each question, choose one of the following:
- **Red Light**: Our organization hasn't started work in this area yet
- **Yellow Light**: Plans exist to use in planning and implementation
- **Blue Light**: This is in place and we have some evidence of its use
- **Green Light**: This is part of our routine, and we model it for others

	Red Light	Yellow Light	Blue Light	Green Light
POWER - *the ability to influence and inform decisions, independently of others*				
1) Has your organization made a public commitment to equity and incorporated equity into your mission and/or values statements?				
2) Does the organization have people of color (POC) as board members and director level staff?				
3) Does the organization ensure that a pipeline of POC leaders are on track to become decision-makers within your organization?				
4) Does the organization have authentic and accountable relationships with POC individuals and organizations within the region that provide input into your programs?				
5) Does the organization raise adequate resources for its Racial Equity work?				
6) Are benchmarks around racial equity incorporated into the annual evaluation for the Executive Director? All employees? Board?				
PROGRAM - *the services delivered in conjunction with organizational mission*				
1) Does the organization analyze the comprehensive needs of people of color within your geographic area, including meeting with leaders from communities of color, as a part of programming assessment, planning, and implementation?				
2) Does your organization visibly post materials in languages other than English?				
3) Does the organization set goals for Racial Equity across program areas that seek to name and address racial disparities and harms?				
4) Does the organization advocate and support the inclusion of Racial Equity issues when working in collaborations?				
5) Does your organization allocate resources for engagement and outreach in communities of color?				
6) Do you have metrics, benchmarks, and indicators for measuring the organization's success in Racial Equity?				
POLICIES - *the regulations and guidelines adopted to govern an organization*				
1) Does your organization have a written racial equity plan with clear actions, timelines, people responsible for each action, indicators of progress, etc.?				

Question				
2) Does the organization have anti-discrimination policies that explicitly prohibit harassment of POC members and stakeholders of the organization?				
3) Does the organization use affirmative action in hiring processes?				
4) Does the organization have benchmarks around leadership development and retention of people of color?				
5) Do you periodically assess the disproportionate impact of organizational policies on staff and/or constituents of color?				
PEOPLE - *the individuals in relationship with an organization*				
1) Do your staff and board reflect the full spectrum of POC communities within the region?				
2) Are white people supported and evaluated in deepening knowledge and building skills around issues of privilege and equity work either within or outside the organization?				
3) Does your organizational leadership have values-based relationships with POC leaders in the region that work towards building long term alliances?				
4) Are people of color on staff supported in identifying and participating in leadership development opportunities?				
5) Are staff, board, and leadership provided organizational space, time, resources, and structure to discuss and respond to issues of Racial Equity within and outside your organization?				
CULTURE - *the practices, traditions, and behaviors that shape an environment*				
1) Are the full identities of all people (race, ethnicity, sexual orientation, gender identity and expression, immigration status, ability status, age, languages spoken, family formation, etc.) recognized, respected, and taken into consideration in the development of organizational culture?				
2) Are the staff and board trained in interrupting racism at organizational events and within the organization?				
3) When the organization plans activities and events do you consistently consider basic needs like childcare, interpretation, food, proximity to transit lines, or time of day?				
4) Is white culture not treated as the norm or default? Are people of color not expected to assimilate into the existing organizational culture?				
5) Do staff consistently apply a Racial Equity lens and understanding of power and privilege in every day program design, client interaction, and problem-solving?				
6) Do you consistently communicate to your members, leaders, donors, and allies the Racial Equity values and work that you do?				

Total the number of items you checked in each column:
- **Red Light**: Equity-Absent Approach   _____
- **Yellow Light**: Diversity-Only Approach   _____
- **Blue Light**: Equity-Tentative Approach   _____
- **Green Light**: Equity-Focused Approach   _____

Your organization's current Equity Approach is the category that had the highest total score.

Continuum for Equity-Focused Work

Equity-Absent   **Diversity-Only**   **Equity-Tentative**   **Equity-Focused**

Organizational Strengths (based on the results of the tool):

Your Organization's Opportunities for Growth:

Action Steps That You as A Leader of Your Organization Will Take in the Next 12 Months (sample Equity Action Plan Template attached):

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