

Chautauqua County IDEA Working Group

Organizational Racial Equity Self-Assessment Survey

Purpose & Background

This self-assessment survey was created by the Steering Committee of the *Chautauqua County Inclusion, Diversity, Equity and Accessibility (IDEA) Coalition*. The purpose of this survey is to serve as a tool to assist our member organizations to

- Conduct a self-assessment via this survey to help them get a holistic overview of their current IDEA efforts with a specific focus on racial equity, and
- Serve as an internal assessment tool designed to help promote dialogue and action planning within the organization

We encourage you to identify a small group of individuals within your organization who might be able to weigh-in on your IDEA and racial equity efforts. The questions in the survey might help you generate dialogue within the organization to understand areas where you are making progress and identify areas that might need more attention and resources.

We will note that we see broad Inclusion, Diversity, Equity and Accessibility (IDEA) work as intrinsically linked to the success of racial equity efforts. However, this survey has a much stronger focus on racial equity because broad IDEA work alone might not lead to racial equity outcomes.

What is the end goal of using this self-assessment survey?

Using this tool is entirely optional and is only provided to you as a tool to generate conversation and subsequent plans to **develop 2-5 IDEA or racial equity goals that your organization would like to set for the next 12-18 months**. The steering committee will be inviting organizations to share these short-term goals with the coalition members in early Spring, 2022. Once we have collected these goals, the steering committee will seek avenues to provide shared resources, trainings, etc. We will also bring organizations together with similar goals so that we can support each other and learn from best practices.

Please note that we will not be asking organizations to share their completed survey results with others. It is simply meant for your organization's internal use.

Organization of the survey

The survey is divided into the six following focus areas, followed by an overall overview of the current IDEA and racial equity work assessment of your organization:

- Organizational commitment to racial equity work
- Racial Diversity within the organization
- Staff Preparedness and Education
- Policies and Procedures
- Community & Patrons (as applicable to your organization)
- Investments in IDEA Infrastructure (note: broader than racial equity work)

Note: If a particular section or question is not quite applicable to the mission of your organization, then please adapt or modify it in ways that would make sense for your organization.

Scoring

- Each question should be scored on the following scale:
 - 5=Strongly Agree
 - 4=Agree
 - 3=Neutral
 - 2=Disagree
 - 1=Strongly Agree
- If you are unsure about an answer, try to reach consensus with those around the table
- If a question is not applicable to your organization, you can strike it from your self-assessment, and do not include this in calculating the percentage for this section.

Percentage Score Interpretation for each section of the survey

- **80-100%:** Your organization is significantly focused in this area; Consider how to do more advanced work in this area OR invest energy/resources in other areas while continuing your work in this area
- **60-79%:** Your organization is doing some work in this area; Consider specific strategies to enhance your work in this area
- **40-59%:** Your organization would benefit from developing stronger and clearer goals and strategies in this area; consider engaging with other coalition partners for ideas and resources
- **Below 39%:** There is significant room for growth in this area; consider engaging a consultant or other strategies to establish goals and strategies in this area.

Questions, Comments, Suggestions?

- If you have questions, comments or suggestions on how to improve this survey tool, please reach out to Amit Taneja, Senior Vice President and Chief Inclusion, Diversity, Equity and Accessibility (IDEA) Officer at Chautauqua Institution, at ataneja@chq.org.
- NOTE: If you are part of an organization that is not affiliated with the Chautauqua County IDEA Coalition, you are more than welcome to use this survey with appropriate credit. You may not, however, reproduce, alter, post, sell, copy or share this survey without formal written consent. For more information, please email ataneja@chq.org

A. Organizational commitment to racial equity work

	Rating Scale
1. The organization has a publicly stated commitment to racial equity that is congruent with its mission, vision and/or values.	1 2 3 4 5
2. The organization has racial equity plans (either as a standalone public document, or incorporated in its strategic goals)	1 2 3 4 5
1. The board of directors/trustees has articulated its commitment to racial equity and holds leadership accountable by receiving periodic plans, assessments and DEI updates	1 2 3 4 5
2. The organization periodically communicates its values and progress on ongoing work around racial justice and equity to its staff, patrons and the larger community it serves	1 2 3 4 5
3. The organization, via its actions, is widely known as committed to racial equity in its work	1 2 3 4 5
Please total your responses for this section	
Percentage performance (Total/25)	

Reflection Notes:

- What are areas of strength or growth in this section?
- What goals or strategies might enhance work in this section?
- What resources do you need to realize these goals and strategies? Who (person, committee, group, etc.) can shepherd this work within your organization?

B. Racial Diversity within the organization

	Rating Scale
1. The organization's board is racially diverse and reflective of the community we serve	1 2 3 4 5
2. Increasing board diversity is an articulated goal along with plans to recruit more diverse board members	1 2 3 4 5
3. The organization's senior leadership is racially diverse and reflective of the community we serve	1 2 3 4 5
4. Increasing the diversity of the senior leadership is an articulated goal along with plans to recruit more diverse senior leaders	1 2 3 4 5
5. The organization's staff are racially diverse and reflective of the community we serve	1 2 3 4 5
6. Increasing staff diversity is an articulated goal along with plans to recruit more diverse staff members	1 2 3 4 5
7. Retention, succession and career progression plans are in place to retain high performing employees, including employees of color	1 2 3 4 5
8. The organization's volunteers are racially diverse and reflective of the community we serve	1 2 3 4 5
9. Increasing racial diversity of our volunteers is an articulated goal along with plans to recruit more diverse volunteers	1 2 3 4 5
Please total your responses for this section	
Percentage performance (Total/45)	

Reflection Notes:

- What are areas of strength or growth in this section?
- What goals or strategies might enhance work in this section?
- What resources do you need to realize these goals and strategies? Who (person, committee, group, etc.) can shepherd this work within your organization?

C. Staff Preparedness and Education

	Rating Scale
1. Staff at all levels of the organization are culturally competent in working with racially diverse staff members and serving racially diverse patrons	1 2 3 4 5
2. The organization regularly engages in training and education to enhance the racial cultural competence of our staff members, board, and volunteers	1 2 3 4 5
3. The orientation and onboarding process for new staff specifically covers organizational values, cultural competence and DEI strategic priorities	1 2 3 4 5
4. All staff, including people of color, feel a sense of belonging and inclusion at the organization	1 2 3 4 5
5. All staff see racial equity work as part of their own work and of the larger goals of the organization	1 2 3 4 5
Please total your responses for this section	
Percentage performance (Total/25)	

Reflection Notes:

- What are areas of strength or growth in this section?
- What goals or strategies might enhance work in this section?
- What resources do you need to realize these goals and strategies? Who (person, committee, group, etc.) can shepherd this work within your organization?

D. Policies and Procedures

	Rating Scale
1. Hiring procedures specifically include intentional recruitment of applicants of color along with measures to mitigate implicit bias	1 2 3 4 5
2. The organization has explicit <u>policies</u> against discrimination and all employees are periodically reminded of these policies	1 2 3 4 5
3. Clear <u>procedures</u> are in place to investigate & address harassment & unlawful discrimination (including racial discrimination)	1 2 3 4 5
4. Employees are able to report concerns, including harassment and discrimination claims, without fear of retaliation	1 2 3 4 5
5. All policies of the organization are periodically reviewed with an eye towards equity	1 2 3 4 5
Please total your responses for this section	
Percentage performance (Total/25)	

Reflection Notes:

- What are areas of strength or growth in this section?
- What goals or strategies might enhance work in this section?
- What resources do you need to realize these goals and strategies? Who (person, committee, group, etc.) can shepherd this work within your organization?

E. Community & Patrons (as applicable to your organization)

	Rating Scale
1. All patrons, including people of color, feel a sense of belonging and inclusion at the organization	1 2 3 4 5
2. The organization engages with community partners, including communities of color, to seek input and feedback on strategic priorities and initiatives	1 2 3 4 5
3. The organization collects and analyzes demographic data, including race, to assess its impact and outreach to communities of color	1 2 3 4 5
4. The organization has worked with other organizations to advance racial equity in the community	1 2 3 4 5
5. Community demographics data, including race, are central to program planning and service delivery	1 2 3 4 5
6. Increasing the racial diversity of our patrons is an articulated goal along with plans to do so	1 2 3 4 5
7. The organization has a written policy and procedures to consider vendor diversity, including businesses owned by women and people of color	1 2 3 4 5
Please total your responses for this section	
Percentage performance (Total/35)	

Reflection Notes:

- What are areas of strength or growth in this section?
- What goals or strategies might enhance work in this section?
- What resources do you need to realize these goals and strategies? Who (person, committee, group, etc.) can shepherd this work within your organization?

F. Investments in IDEA Infrastructure (note: broader than racial equity work)

	Rating Scale				
1. There is one or more senior leaders (decision making authority + budgetary resources) whose position description includes IDEA work	1	2	3	4	5
2. There are clearly articulated IDEA goals or strategic priorities and these are widely and publicly shared with staff, board and patrons	1	2	3	4	5
3. IDEA work has been incorporated into the written job descriptions of the majority of employees (so that IDEA work is not the sole responsibility of a limited number of staff)	1	2	3	4	5
4. Employees are evaluated on their IDEA efforts during their annual performance evaluation, and such evaluation impacts their merit raises (if applicable)	1	2	3	4	5
5. The organization assesses and widely shares progress on IDEA goals with staff, board and volunteers	1	2	3	4	5
6. The organization has set aside appropriate budgetary resources to meet IDEA goals	1	2	3	4	5
Please total your responses for this section					
Percentage performance (Total/30)					

Reflection Notes:

- What are areas of strength or growth in this section?
- What goals or strategies might enhance work in this section?
- What resources do you need to realize these goals and strategies? Who (person, committee, group, etc.) can shepherd this work within your organization?

Overall IDEA and Racial Equity Outlook

Please place an “X” in the “Percentage Performance” for each of the previous six sections to get a bird’s-eye view of the overall IDEA state of your organization:

	Below 40%	40- 59%	60- 79%	80- 100%
Organizational commitment to racial equity work				
Racial Diversity within the organization				
Staff Preparedness and Education				
Policies and Procedures				
Community & Patrons (as applicable to your organization)				
Investments in IDEA Infrastructure (note: broader than racial equity work)				

Given the responses above, please take some time to reflect on the following questions:

- What are the overall IDEA areas of strength and growth for your organization?
- How does your broader IDEA work emphasize and support racial equity work?
- What are the areas where you are best positioned to make advances?
- Which 2-5 specific IDEA and/or racial equity goals can your organization reasonably set and achieve in the coming 12-18 months? How will you share these goals with others?
- What resources do you need to realize these goals and strategies?
- Who (person, committee, group, etc.) can shepherd this work within your organization?
- How will you measure success (or not) in these goal areas? How will you provide updates on this work?