

## CHECKLIST TO REVIEW INCLUSIVITY ACROSS THE ORGANIZATION

### Organizational Diversity, Inclusion & Equity – A Self-Assessment Tool

Please rank the status of each of the following items on a scale of 0 to 3, according to the ratings shown below:

0 - Not yet started    1 - Beginning phase    2 - Well under-way    3 - Fully Developed (including monitoring/review procedures)    N/A - Not Applicable / Don't know

Where appropriate, please add your comments to explain or illustrate your rating.

Standards	Measures	STATUS	COMMENTS/EVIDENCE
<b>A. GOVERNANCE</b>			
<b>1. POLICIES, GUIDELINES AND PRACTICES</b>			
<b>Vision:</b> <i>The organization's commitment to creating an environment free of systemic and individual barriers to inclusion and equity is incorporated into the policies, guidelines and practices of the organization.</i>			
<b>1.1</b> The organization's commitment to diversity and inclusion is known and understood by all Board members, management, staff, volunteers, members and organizational affiliates.	1. The Board has made public their commitment to diversity, inclusion and equity.		
	2. Opportunities for the involvement of diverse segments of the population, as well as all members of the organization (Board, staff, volunteers) have been clearly defined in the development of organizational policies and strategies.		
<b>1.2</b> Anti-discrimination and workplace harassment policies are in place, including principles and objectives of diversity,	1. The organization has incorporated the principles of diversity, inclusion and equity into its statement of values.		

Standards	Measures	STATUS	COMMENTS/EVIDENCE
inclusion and equity in the areas of governance, programs, services and human resources management.	2. The organization allocates appropriate resources (staffing, time, financial) to the development and review of policies relating to diversity, inclusion and equity.		
1.3 Principles of diversity, inclusion and equity are embedded in all organizational policies and practices.	1. The organization has addressed issues of diversity and inclusion in its strategic plan.		
	2. The organization has assessed its existing policies, guidelines and practices to determine if they are congruent with the principles of diversity and inclusion.		
1.4 Mechanisms are established to monitor and measure progress towards achieving organizational change to reduce barriers to inclusion and equity.	1. The Board has explored the possibility of systemic barriers to inclusion existing in their governance and Board policies and practices.		
	2. The Board has formulated an action plan to eliminate barriers to inclusion.		
	3. The Board has put a monitoring procedure in place with respect to progress made in the areas of diversity, inclusion and equity.		
<p><b>LEADERSHIP</b></p> <p><b>Vision:</b> <i>The organization's leaders' commitment to diversity, inclusion and equity is known within the organization and in the community and is reflected in the decision-making structures and processes of the organization.</i></p>			
2.1 The Board and management provide informed leadership in the	1. The Board has clearly outlined its expectations for management on the implementation of diversity, inclusion and equity policies.		

<b>Standards</b>	<b>Measures</b>	<b>STATUS</b>	<b>COMMENTS/EVIDENCE</b>
implementation of anti-discrimination and workplace harassment policies.	2. The Board has clearly outlined its expectations for management on the implementation of workplace discrimination/harassment policies.		
	3. The Board has developed clear guidelines to follow if the policies are breached.		
	4. The Board and management have committed resources for the effective implementation of diversity, inclusion, equity and workplace discrimination/harassment policies and programs.		

**INCLUSIVENESS OF PROCESS**

**Vision:** *The decision-making process is inclusive and reflects community needs and expectations.*

<p><b>3.1</b> Information concerning governance structure and opportunities to serve are effectively communicated to members of diverse communities within the service area.</p>	<p>1. The organization has developed a communications strategy to inform diverse populations of its activities and invite them to participate.</p>		
	<p>2. The organization has developed a comprehensive list of community and ethnic media.</p>		
	<p>3. The organization has developed a comprehensive list of community, regional and provincial groups and organizations that deal directly with diverse and/or marginalized populations.</p>		
	<p>4. The organization has developed a comprehensive list of other points of access for reaching diverse communities (i.e. places of worship, community centers, social clubs etc.).</p>		
	<p>5. The organization has compiled and updated provincial and regional profiles including demographics and social, economic, health and environmental issues.</p>		
<p><b>3.2</b> Partnerships between community organizations and the organization are in place, reflect the diversity of the population, and are functioning well.</p>	<p>1. The organization has developed an effective and inclusive formal and informal working relationship with diverse community groups and organizations.</p>		
	<p>3. The organization has developed a two-way consultation mechanism with diverse communities.</p>		
	<p>4. Partnerships are actively sought with organizations representing diverse populations.</p>		
	<p>5. Partnership agreements include a process for conflict resolution.</p>		

<p><b>3.3</b> Members of diverse communities are equitably represented in the different levels of the organization, i.e. Board, committees and management.</p> <p><b>3.3</b> (Cont'd) Members of diverse communities are equitably represented in the different levels of the organization, i.e. Board, committees and management.</p>	1.	The organization has explored the possibility of systemic barriers in the recruitment, selection and retention processes for Board, committees and senior management. (i.e. advertising outlets, criteria for selection, interview process, time/ financial requirements for participation)		
	2.	The Board has explored the possibility of barriers existing in the way it and its committees function. (e.g. time and location of meetings, accessibility of building, availability of child/ elder care, meeting style)		
	3.	Orientation and training are provided to members as needed to increase their ability to participate effectively.		
	4.	Time is set aside in meetings for each member to express their perspective and concerns.		
	5.	Ground rules have been determined which state how group members are to relate to one another.		
	6.	Terms of reference for committees include a process for conflict resolution.		
	7.	The organization has developed a plan to eliminate barriers and to enhance participation in the Board and committees.		
<p><b>3.4</b> Effective mechanisms are in place to handle complaints about incidence of discrimination from organizational affiliates, volunteers and community groups.</p>	1.	The organization has developed a mechanism for effectively handling complaints of incidences of discrimination from organizational partners, affiliates, volunteers and community groups.		

	<p>2. The organization has developed a strategy to ensure that the Board, management, staff, organizational affiliates, volunteers and community groups are aware of their right to access the complaints procedure to address any incidence of discrimination.</p>		
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<b>B. PROGRAMS &amp; SERVICES</b>			
<b>1. SERVICE PLANNING</b>			
<b>Vision:</b> <i>Services are barrier-free and appropriate to the needs of diverse communities.</i>			
<p><b>1.1</b> Participation of diverse communities in the needs identification and planning of organizational programs and services is supported and encouraged.</p>	<p>1. Key members of diverse communities have been invited to participate in the planning of the organization's programs and services.</p>		
	<p>2. The organization has obtained information about the needs and interests of these diverse communities.</p>		
<b>2. SERVICE DELIVERY</b>			
<b>Vision:</b> <i>Programs and services are responsive to the values, norms and needs of diverse communities.</i>			
<p><b>2.1</b> Programs and services are adapted to take into account and accommodate the values, norms and issues of diverse communities.</p>	<p>1. Staff adapt programs and services to respond to identified needs and issues; e.g.:</p> <ul style="list-style-type: none"> <li>- Meals/childcare/transportation</li> <li>- Respect for faith/spiritual practices</li> <li>- Meeting times, locations and structures</li> <li>- Services respond to expressed issues and needs</li> </ul>		

<b>2.2</b> Appropriate linguistic resources are provided to ensure equitable utilization of organizational programs and services by the diverse communities.	1. The various linguistic groups have been identified within its service area.		
	2. The organization has developed an action plan with members of diverse communities to eliminate language barriers to accessing programs and services.		

**3. OUTREACH**

**Vision:** *Diverse communities in the service area know of the organization's programs and services.*

<p><b>3.1</b> Effective, equitable and appropriate strategies are utilized to communicate programs and services with diverse communities within the service area.</p>	<p>1. An outreach strategy has been developed and appropriate resources allocated to reach the various communities in an equitable manner.</p>		
	<p>2. A communication strategy has been developed to provide information to various communities within the service area, including:</p> <ul style="list-style-type: none"> <li>- Targeted media (TV, audio/radio, print)</li> <li>- Community newspapers</li> <li>- Key informants</li> <li>- Community leaders</li> </ul>		
	<p>3. The organization has established a two-way communication mechanism with diverse communities in its service area.</p>		

**C. HUMAN RESOURCES**

**1. STAFF RECRUITMENT / RETENTION / PROMOTION**

**Vision:** *All levels of staff reflect the diversity found in the province.*

<p><b>1.1</b> Staff, organizational affiliates and volunteers are reflective of the</p>	<p>1. The organization has explored the possibility of barriers in the recruitment, hiring, promotion and retention of diverse staff, organizational affiliates and volunteers.</p>		
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diverse communities in the broader community.	2. Paid and volunteer opportunities have been advertised in non- mainstream media. (i.e. target media, community newspapers, newsletters of professional associations and community organizations).		
	3. The organization has consulted with members of diverse communities regarding the development of the recruitment process.		
	4. The organization has reviewed the interview process for biases, such as: diversity among the interviewers and bias-free questions.		
	5. Mentoring and conflict resolution systems have been put into place to ensure the retention of diverse staff, organizational affiliates and volunteers.		
<b>2. BOARD / STAFF / VOLUNTEER TRAINING</b>			
<b>Vision:</b> <i>All staff and volunteers are knowledgeable about how social, political, economic and cultural differences affect the ability of diverse groups to fully participate in their communities, and are skilled in working with diverse members of the community.</i>			
<b>2.1</b> All staff, Board members and volunteers are given opportunities to participate in diversity, inclusion and equity knowledge and skill development programs.	1. The knowledge and skills of its Board, management, staff and volunteers have been assessed in the areas of diversity, inclusion and equity.		
	2. The organization has developed a diversity, inclusion and equity education program, attended by all staff, Board members and volunteers.		
	3. The organization has involved members of diverse communities in the planning, delivery and evaluation of the diversity, inclusion and equity education program.		
	4. The organization keeps its resources current for staff, professionals and volunteers to update their knowledge and skills on appropriate service delivery to diverse communities.		

**3. PERFORMANCE APPRAISALS**

**Vision:** *Improved staff, Board and volunteer performance promotes an environment free of all forms of discrimination, workplace harassment and barriers to inclusion and equity.*

<b>3.1</b> Evaluation of management, staff and volunteers includes adherence to discrimination and workplace harassment prevention policies.	1. The organization has developed clear guidelines for staff to provide cross-cultural services within an inclusive framework.		
	2. Indicators of diversity and inclusion are included in the performance appraisal of staff.		
	3. Consideration is given to volunteers' contributions to promoting diversity, inclusion and equity during volunteer appraisals.		
	4. Indicators of diversity and inclusion are included in the performance appraisal of the Board of directors' functions.		

**D. EVALUATION AND MONITORING**

**Vision:** *The organization's programs and services are responsive to the needs of diverse communities.*

<b>1.1</b> An evaluation plan is in place to monitor the accessibility, appropriateness and effectiveness of programs and services.	1. The organization has consulted with diverse communities in the development of an evaluation plan.		
	2. The organization has established an evaluation process to monitor the accessibility, appropriateness and effectiveness of programs and services to diverse communities.		

**Additional Comments**

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