

# ADVANCING DIVERSITY, EQUITY, & INCLUSION IN YOUR ORGANIZATION

By assessing your organization's strengths and weaknesses in regard to diversity, equity, and inclusion, your organization can improve its service delivery, participant and customer experiences, and employee satisfaction to become an organization that celebrates and serves all.

An Organizational  
Self-Assessment Tool  
by City of Pearland's  
DEI Task Force



## Introduction

This Diversity, Equity, and Inclusion (DEI) Organizational Self-Assessment Tool (OSAT) was designed to assist organizations in evaluating the status of their DEI work. This assessment tool is a great starting point for initiating discussions about diversity, equity, and inclusion within organizations. It can help identify areas where organizations are successfully integrating DEI and areas that could be improved. When completed fully and honestly, the OSAT can help set a strategy for action in bringing diversity, equity, and inclusion into an organization.

## Who Should Complete This Assessment?

Any person with knowledge of an organization can answer the questions. When completing the assessment, it's important to remember that the focus is on the entire organization and how all parts of the organization are working to integrate DEI. If the assessment taker is part of a large organization with departments that are more autonomous, the OSAT can be filled out with that smaller department in mind. For example, an employee from the City of Pearland can fill out the assessment with the whole City government in mind, or they can narrow the focus to just the Parks & Recreation Department. It can also be beneficial to have multiple people from different levels of the same organization complete the OSAT. Individual results can be anonymous but can be compared to get an organization's average score.

While the OSAT is a great tool for getting an organization started with DEI work, it can also be used by organizations with established DEI programs to establish a benchmark score. By retaking the OSAT yearly or every six months, an organization can ensure that progress is consistently being made toward their DEI goals.

## How to Use the Tool

The OSAT is organized into four different sections, each focusing on a different aspect of an organization. In each section, the assessment taker will rate the extent to which their organization complies with questions being asked by using a concrete indicator scale from 1 to 5. If a question does not apply to an organization, it should be rated as "Not Applicable" and this score should be kept out of the calculation of the assessment score. In addition to the numbered rating scale, a secondary indicator identifies specific categories of diversity, equity, and inclusion (Gender, Race, LGBTQ+, Disability) that are often areas of focus. Presence of these in an organization should be indicated with a Yes or No method.

The self-assessment process will be most beneficial when ratings are made with careful and honest review of the organization's current practices. Each question of the assessment provides a space to note examples of evidence used by the assessment taker to make a decision about the rating. Once all questions have been rated, the overall organizational score can be calculated.

The final section of the OSAT is an action planning guide. It prompts the organization to analyze and review the score and ratings of the completed assessment and identify several areas to prioritize for action.

## Section 1: General Organizational Interest

**Objective:** The organization identifies diversity, equity, and inclusion as a priority and has expressed interest in furthering and improving itself in regard to DEI.

### Section Scoring Scale:

No action taken <b>1</b>	Minimal action taken <b>2</b>	Partial action taken <b>3</b>	Substantial action taken <b>4</b>	Full action taken <b>5</b>	Not Applicable <b>N/A</b>
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Assessment Questions	Supporting Evidence Notes	Specific Areas of Action				Score
		Gender	Race	LGBTQ+	Disability	
<b>General Organizational Interest</b>		Y/N	Y/N	Y/N	Y/N	
My organization has a policy, mission statement, or strategic plan that includes an expressed commitment to diversity, equity, and inclusion.						
I am aware of other members of my organization that have expressed interest in diversity, equity, and inclusion within our organization.						
My organization has identified staff or committees to work on actions related to diversity, equity, and inclusion.						
My organization regularly evaluated its diversity, equity, and inclusion work.						

## Section 2: Organization Culture

**Objective:** The organization demonstrates a strong commitment to diversity, equity, and inclusion by ensuring its organizational culture and environment are welcoming and inclusive.

### Section Scoring Scale:

No action taken	Minimal action taken	Partial action taken	Substantial action taken	Full action taken	Not Applicable
<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>N/A</b>

Assessment Questions	Supporting Evidence Notes	Specific Areas of Action				Score
		Gender	Race	LGBTQ+	Disability	
<b>Organization Culture</b>		Y/N	Y/N	Y/N	Y/N	
My organization’s leaders actively promote diversity, equity, and inclusion (e.g., leadership communicates about diversity, equity, and inclusion, management supports staff in setting and achieving diversity, equity, and inclusion goals).						
My organization provides an inclusive and welcoming environment for diverse groups (e.g., decor, posters, signage reflect the diverse employee and client populations).						
My organization ensures that our communication methods are both accessible to and inclusive of diverse groups (includes written materials and websites – e.g., translated into different languages, written in braille, includes images and wording that represents diverse employees and audiences).						
My organization recognizes and celebrates diverse cultures and religious/spiritual affiliations (e.g., dietary requirements, holidays and celebrations, prayer accommodations).						

## Section 3: Employee Education & Training

**Objective:** The organization recognizes the value of diversity, equity, and inclusion education/training and provides employees with opportunities to develop knowledge and skills to recognize DEI areas of need and to work effectively within a diverse and inclusive environment.

### Section Scoring Scale:

No action taken <b>1</b>	Minimal action taken <b>2</b>	Partial action taken <b>3</b>	Substantial action taken <b>4</b>	Full action taken <b>5</b>	Not Applicable <b>N/A</b>
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Assessment Questions	Supporting Evidence Notes	Specific Areas of Action				Score
		Gender	Race	LGBTQ+	Disability	
<b>Employee Education &amp; Training</b>		Y/N	Y/N	Y/N	Y/N	
My organization provides and requires all staff, from all levels, to complete or participate in educational training related to diversity, equity, and inclusion.						
My organization provides resources (e.g., articles, webinars, websites, workshops) to staff that encourage learning about diversity, equity, and inclusion issues.						
My organization evaluates the progress of its diversity, equity, and inclusion trainings and resources through employee assessments.						

## Section 4: Community Building

**Objective:** The organization is committed to cooperatively creating community change by supporting the development of partnerships, networks, and advocacy to advance diversity, equity, and inclusion work within its community.

**Section Scoring Scale:**

No action taken <b>1</b>	Minimal action taken <b>2</b>	Partial action taken <b>3</b>	Substantial action taken <b>4</b>	Full action taken <b>5</b>	Not Applicable <b>N/A</b>
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Assessment Questions	Supporting Evidence Notes	Specific Areas of Action				Score
		Gender	Race	LGBTQ+	Disability	
<b>Community Building</b>		Y/N	Y/N	Y/N	Y/N	
My organization engages in advocacy related to diversity, equity, and inclusion (e.g., advocacy for policy and system changes that support diversity, equity, and inclusion in the organization).						
My organization develops meaningful partnerships with outside groups to advance diversity, equity, and inclusion within the organization and community.						
My organization participated in advisory committees, networks, coalitions, and task forces focused on enhancing diversity, equity, and inclusion within our region or field.						

## Section 5: Service Planning & Development

**Objective:** The organization incorporates diversity, equity, and inclusion principles into planning and developing services.

**Section Scoring Scale:**

No action taken	Minimal action taken	Partial action taken	Substantial action taken	Full action taken	Not Applicable
1	2	3	4	5	N/A

Assessment Questions	Supporting Evidence Notes	Specific Areas of Action				Score
		Gender	Race	LGBTQ+	Disability	
<b>Service Planning &amp; Development</b>		Y/N	Y/N	Y/N	Y/N	
My organization utilizes community demographic information to inform service planning and development.						
My organization uses and/or conducts research and needs assessments to identify diversity, equity, and inclusion-related needs and gaps in services.						
My organization has a method for identifying service barriers within our community/audience and reducing those barriers through diversity, equity, and inclusion to create access to services.						
My organization collects participant information that can be used to drive diversity, equity, and inclusion planning (e.g., cultural, gender, and race identification, languages used in the home, special accommodations needed).						
My organization has a financial assistance program available for those that qualify and need it and the program is easily accessible for those searching for it.						
My organization has an accessibility and/or service accommodation policy for those with reasonable needs and information on requesting those services is easily available.						

My organization provides education/training to staff on how to provide service that is respectful of participants' values, beliefs, identity/expression, and knowledge.						
My organization provides communication supports for service provision (e.g., supports for hearing, visual, cognitive, and speech impairments).						
My organization ensures participant education and communication materials are accessible to, and inclusive of diverse groups (e.g., materials are written in plain language, materials are offered in multiple languages).						
My organization has an outreach strategy to ensure service provision reaches diverse and marginalized communities (e.g., satellite sites in hard to serve areas).						
My organization evaluates services to ensure that service delivery is inclusive and equitable (e.g., participant satisfaction surveys, assess if quality of service provision is high across participant populations).						



## Overall Organization Assessment Score with Action Planning

This section of the OSAT will assist you in understanding how well your organization is performing with regards to diversity, equity, and inclusion across the five measured sections. It helps identify areas where your organization is successfully taking action in diversity, equity, and inclusion, as well as areas where it may need to improve. Along with the Average Assessment Score, which shows the average rating for each section out of the five indicator levels, it also allows you to see if the organization has any specific areas within DEI that are being met more than others.

The Action Plan section will prompt you and your organization to identify some defined steps needed to take action and make advancements in diversity, equity, and inclusion.

### Interpretation of Assessment Scores:

**Substantial**  
work is needed to  
improve our DEI  
status  
**1**

**Moderate**  
work is needed to  
improve our DEI  
status  
**2**

**Some**  
work is needed to  
improve our DEI  
status  
**3**

**Minimal**  
work is needed to  
improve our DEI  
status  
**4**

**Our organization has  
met all areas  
covered in this  
assessment**  
**5**

SECTIONS	TOTAL ASSESSMENT SCORE (Sum of scores)	SPECIFIC AREA SCORES (Number of each "Yes" answer)				AVERAGE ASSESSMENT SCORE (Total Score/# of applicable indicators = Avg. Score out of 5)
		Gender	Race	LGBTQ+	Disability	
1. General Organizational Interest						_____ / _____ = of 5
2. Organization Culture						_____ / _____ = of 5
3. Employee Education & Training						_____ / _____ = of 5
4. Community Building						_____ / _____ = of 5
5. Service Planning & Development						_____ / _____ = of 5
	<b>TOTAL SPECIFIC AREA SCORES</b>	=	=	=	=	

## Creating an Action Plan

Create an action plan that outlines attainable steps to advance diversity, equity, and inclusion in your organization over the next year in each of your chosen sections.

The action plan that you create should clearly identify your focus areas so that concrete actions can be taken in that particular area. Set quarterly goals to keep your organization accountable and on track to make improvements. After you have completed the action plan for the first year, your organization can either select additional sections to work on based on the OSAT, or it can retake the OSAT to identify new areas of success and areas needing improvement based on the new DEI work that has been completed.

**NOTE:** DEI work is never really finished. As the world changes, new issues are brought to light and changes in your community can drive barriers and needs in different ways. Success in DEI means continued work to improve your programs, services, and policies to make your organization the most diverse, the most equitable, and the most inclusive that it can be. Because it can feel hard to make progress and never reach an end point, it is important to identify what your organization's strengths are and how those strengths have grown since the beginning of the organization's DEI journey. Re-evaluating your organization every year can help show the scale of changes and improvements that it has made.

Based on the assessment scores of your organization, **identify 2-3 sections where your organization needs improvement** with regards to diversity, equity, and inclusion.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

Go back and look through the Assessment Questions in those sections and choose the specific areas that you would like to focus your efforts on. You may also identify your own areas of focus. It is important that the areas you select for improvement are the most important to your organization and will have the greatest impact on its diversity, equity, and inclusion journey at this point in time.

### **Sample questions to consider and answer for each improvement when developing your Action Plan:**

1. How will this action advance diversity, equity, and inclusion at the organization?
2. What is the timeline for taking this action?
3. Who will take the lead on ensuring this action is developed and implemented?
4. Which organization leaders/stakeholders will need to be involved to make this action happen?
5. What resources are needed to make this action happen?
6. How will you measure whether this action leads to improvement?

## Resources

- City of Pearland's DEI Strategic Plan
- Diversity & Inclusion Charter of Peel - <http://www.dicharter.rdrpeel.org/wp-content/uploads/2016/02/DEI-Organizational-SAT-Jan-8-Booklet-Final-Copy.pdf>
- D5's Self-Assessment for DEI - <http://www.d5coalition.org/wp-content/uploads/2014/02/DEI-Self-Assessment-10.28.13.pdf>

## Contact

For questions or discussions about how to utilize this OSAT or how to work on developing or improving your DEI goals, please reach out to the author.

August Vandiver  
Outdoor Recreation Specialist  
City of Pearland Parks and Recreation  
[avandiver@pearlandtx.gov](mailto:avandiver@pearlandtx.gov)  
281-652-1984  
[Linkedin.com/in/augustvandiver/](https://www.linkedin.com/in/augustvandiver/)