

Diversity, Equity, and Inclusion (DEI) Organizational Assessment Tools: *A Resource Guide*

June 2021

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Diversity, Equity, and Inclusion (DEI) Organizational Assessment Tools: A Resource Guide

Overview

This is a point-in-time snapshot of instruments from the rapidly evolving field of Diversity, Equity, and Inclusion (DEI) created in 2021. This resource guide provides:

- a list of assessments by organization type;
- an overview of the benefits  and limitations  of each assessment, to assist in selection; and
- direct links and references to encourage further reading.

Content was drawn primarily from searching the grey literature in January 2021. Instruments were chosen based on potential utility for the Institute for Economic and Racial Equity's (IERE) evaluation of the [HEAL Winchendon](#) initiative, a [Moving Massachusetts Upstream](#) (MassUP) project, recency (the majority were created in the last 10 years), and reflection of a diversity of disciplines, domains, and sectors.

Purpose

This resource guide is designed to assist organizations and coalitions in a change process to identify, define, and achieve goals related to diversity, equity, inclusion, and racial justice. It is appropriate for a wide range of organizations from across the health and healthcare, human and social service, education (K-12), and non-profit sectors.

Because of the continual evolution of the DEI field as well as the variation of terms used historically in different disciplines, instruments may refer to cultural and linguistic competence, cultural effectiveness, equity, DEI, and/or justice.

Organizational assessments provide a benchmark to inform quality improvement efforts, recognizing that change is an adaptive process that takes time. All of the instruments included in this list outline a set of dimensions through which DEI is assessed, with specific indicators to reflect the extent to which DEI is put into practice. They are designed for assessment at the organizational level, *not* the individual level. For individual assessment resources, see Georgetown University's National Center for Cultural Competence.*

The project described here was supported by an Investment Award from the Commonwealth of Massachusetts Health Policy Commission (HPC). The contents of this resource guide are the sole responsibility of the authors and do not necessarily represent the views of the HPC.

* <https://nccc.georgetown.edu/assessments/>

How to Use Organizational Assessments

Assessment instruments are intended for organizations that are ready to assess and reflect on their status and progress towards DEI goals. Organizations and coalitions that conduct their own processes of exploration and interrogation can benefit from assessments as one of many tools. Assessments should be used as a basis for dialogue, and as part of a strategic change process.

The Georgetown University National Center for Cultural Competence lists the following Guiding Principles of Self-Assessment for organizations and individuals:[†]

- “Self-assessment is a strengths-based model”;
- “A safe and non-judgmental environment is essential to the self-assessment process”;
- “Self-assessment ensures the meaningful involvement of consumers, community stakeholders and key constituency groups”;
- “The results of self-assessment are used to enhance and build capacity”;
- “Diverse dissemination strategies are essential to the self-assessment process.”

Organizations can use these tools to facilitate ongoing dialogue and organizational change. Assessment results can be used to pinpoint areas for further exploration or to conduct ongoing monitoring. It is highly valuable to have multiple people in an organization share different perspectives; this provides an opportunity and space to reflect on and debrief people’s opinions. Results can provide valuable insight into areas of strength and areas of opportunity for growth. An assessment tool provides the foundation for important discussion and action. By using assessment tools, organizations can then set strategic DEI priorities.

Equity Impact Assessments (EIA) or Equity Impact Review (EIR) Tools

It is important to differentiate organizational assessments from instruments called **Equity Impact Assessments (EIA)** or **Equity Impact Review (EIR) Tools**, which outline processes to be employed when conceiving new projects and policies. Because these are also important tools for promoting equity, a few are included in the final section of this resource guide. According to Race Forward,

A Racial Equity Impact Assessment (REIA) is a systematic examination of how different racial and ethnic groups will likely be affected by a proposed action or decision. REIAs are used to minimize unanticipated adverse consequences in a variety of contexts, including the analysis of proposed policies, institutional practices, programs, plans and budgetary decisions. The REIA can be a vital tool for preventing institutional racism and for identifying new options to remedy long-standing inequities.[‡]

Why This Resource Guide, and Why Now

This resource guide was compiled by Trinidad Tellez, MD, Principal, [\[Health\] Equity Strategies, LLC](#) for the [Institute for Economic and Racial Equity](#) at Brandeis. IERE is the evaluation partner for the [HEAL Winchendon initiative](#), a [Moving Massachusetts Upstream \(MassUP\)](#) grantee. Jessica Santos, PhD, Principal Investigator, and Danielle Chun, Project Director, provided input, shared an early version of this tool with HEAL Winchendon partners, and utilized it to inform one aspect of IERE’s evaluation. While developed to support the efforts of HEAL Winchendon, the resource guide is also designed to serve as a public resource.

[†] <https://nccc.georgetown.edu/assessments/principles.php>

[‡] <https://www.raceforward.org/practice/tools/racial-equity-impact-assessment-toolkit>

Resource Guide

General - p. 1-4

- 1** Institutional Assessment Quiz
JustPartners, Inc. (JPI), of Baltimore, MD
- 2** Race Matters: Organizational Self-Assessment
Annie E. Casey Foundation
- 3** Internal Scan: 2020 Racial Equity and Inclusion Capacity Survey
Living Cities
- 4** Culturally Effective Organizations Framework Organizational Assessment
New Hampshire Equity Collective, Culturally Effective Organizations Work Group
- 5** Washington Race Equity & Justice Initiative (REJI) Organizational Assessment
JustLead Washington
- 6** Inclusive Dubuque's Self-Assessment for Diversity, Equity and Inclusion (DEI)
Inclusive Dubuque
- 7** Equity Organizational Self-Assessment
ABLE Change, Michigan State University
- 8** Racial Justice Assessment Tool
Western States Center
- 9** Working Principles for Health Justice & Racial Equity Organizational Self-Assessment
The Praxis Project
- 10** Diversity, Equity, and Inclusion Spectrum Tool
Meyer Memorial Trust

Child- & Youth-Serving Organizations - p. 5-6

- 11** Tool for Organizational Self-Assessment Related to Racial Equity
Eliminating Disparities in Child & Youth Success Collaborative
- 12** Cultural and Linguistic Competence Family Organization Assessment Instrument
Georgetown University National Center for Cultural Competence
- 13** CLC Assessment Tool: Based on the National Standards for Culturally and Linguistically Appropriate Services in Health and Health Care (CLAS Standards)
Lauren Acevedo, Covian Consulting for SAMHSA & TA-Network

Disability Organizations - p. 7

- 14** The Cultural and Linguistic Competence Assessment for Disability Organizations (CLCADO)
Georgetown University National Center for Cultural Competence

Educational Organizations - K-12 - p. 8

- 15** Equity Audit from the Mid-Atlantic Equity Consortium (MAEC)
- 16** Building For Equity School Self-Assessment Tool
Center for Collaborative Education

Workforce Development Organizations - p. 9

- 17** Workforce Development Racial Equity Readiness Assessment Tool
Race Forward & Center for Social Inclusion (CSI)

City Government - p. 10

- 18** Austin Equity Assessment Tool
City of Austin Equity Office
- 19** Portland Racial Equity Roadmap Assessment
City of Portland, OR, Office of Equity and Human Rights

Local Health Departments - p. 11

- 20** Local Health Department Organizational Self-Assessment for Addressing Health Inequities
Bay Area Regional Health Inequities Initiative (BARHII)

Healthcare Providers - p. 11-12



- 21** Cultural and Linguistic Competence Policy Assessment
Georgetown University National Center for Cultural Competence
- 22** HRET HIIN Health Equity Organizational Assessment (HEOA)
Health Research and Educational Trust
- 23** Inclusion Scorecard for Population Health (ISPH)
Impact4Health

Food Security Organizations - p. 13

- 24** Racial Equity Chapter (10) of the Self-Assessment Workbook for the Hunger Free Communities Network
Alliance to End Hunger



1 Institutional Assessment Quiz¹ 2009 *JustPartners, Inc. (JPI), of Baltimore, MD*

Pages 31-34 of the Annie E. Casey Foundation's RESPECT's "Advancing the Mission: Tools for Equity, Diversity and Inclusion Toolkit" (2009). The Institutional Assessment Quiz tool helps identify where an organization is on a four-point learning continuum and provides a quick benchmark.

-  Very simple instrument with 28 items on one page in four domains which are checked to see what "place" the organization is in. It is part of a toolkit that tells the RESPECT story, "a journey that we feel has lessons for the field of philanthropy and other organizations that are committed to addressing these issues."¹
-  Slightly tailored to funders. Limited as really just assessing seven questions.

2 Race Matters: Organizational Self-Assessment² January 2006 *Annie E. Casey Foundation*

Straightforward two-page tool with nine questions related to Staff Competencies and 10 questions on Organizational Operations to yield a Racial Equity Score and recommended Next Steps.

-  Simple-to-use instrument.
-  Original instrument has tiny font with mixed-directions layout; there is a [larger font version available](#).³

¹ <https://www.aecf.org/resources/advancing-the-mission-tools-for-equity-diversity-and-inclusion/>

² <https://www.aecf.org/resources/race-matters-organizational-self-assessment/>

³ <https://www.culturalyork.org/wp-content/uploads/Organizational-Self-Assessment.pdf>

3 [Internal Scan: 2020 Racial Equity and Inclusion Capacity Survey](#)⁴ 2020

[Living Cities](#)

This is the fourth annual survey of staff “to track our organizational progress toward building our competencies and advancing racial equity at Living Cities.”⁴ “The questions . . . are adapted from [GARE’s Employee Survey for Local Governments](#), [D5 initiative’s Field Survey](#), Vanessa Daniels’ piece “[More is Required of Us](#),” as well as best practices from the field.”⁵

- + Straightforward 29 questions. Recommend fielding every two years. The survey allows the following learning from staff:
 - Understand “where we need to invest in staff training to increase competency around racial equity”;
 - “Understand our collective awareness on racial equity and how it impacts our work”; and
 - “Understand collective awareness of Living Cities’ efforts around racial equity”⁴
- ~ Tailored to Living Cities but adaptable. Does not cover all domains of an organizational assessment, but offers a robust assessment of race equity components.
 - “Download this document” yields the 2020 Internal Scan Findings Report.
 - “Download Document Assets” yields the 2020 Living Cities Employee Survey on REI Capacity.

4 [Culturally Effective Organizations Framework Organizational Assessment](#)⁶ 2018, rev. 2021

[New Hampshire Equity Collective, Culturally Effective Organizations Work Group](#)

This assessment is based on the Culturally Effective Organizations Framework, developed by the Institute for Economic and Racial Equity (formerly the Institute on Assets and Social Policy),⁷ which outlines seven elements that, if operationalized, assure organizations have capacity to provide high quality care, programs, and services to all.

- + 40 items are organized around the seven framework elements: Leadership; Policies and Procedures; Data Collection and Analysis; Community Engagement; Language and Communication Access; Staff Cultural Competence; Workforce Diversity and Inclusion. This assessment helps highlight any disconnect between items that are institutionalized in written plans or policy and evidence of action of the statement being operationalized or implemented within the organization.
- ~ The Culturally Effective Organizations Framework is foundational; it is necessary but insufficient to get to equity/justice. A good starting point for organizations that provide care, programs, or services to people from the health or healthcare, human or social services, education, and/or other domains.

⁴ <https://www.livingcities.org/resources/372-internal-scan-2020-racial-equity-and-inclusion-competency-survey-results>

⁵ <https://www.livingcities.org/resources/344-survey-assessing-our-staff-s-racial-equity-inclusion-competency>

⁶ <http://equitynh.org/wp-content/uploads/2021/06/Culturally-Effective-Organizations-Framework-ORGANIZATIONAL-ASSESSMENT-1.pdf>

⁷ <http://heller.brandeis.edu/iere/pdfs/jobs/culturally-effective.pdf>

5 [Washington Race Equity & Justice Initiative \(REJI\) Organizational Assessment](#)⁸ June 2018 *JustLead Washington*

Organizational Assessment Tool is on pages 22-24 (instructions on page 21). The tool is part of a 120-page comprehensive and very current [Organizational Race Equity Toolkit](#).⁸

- + The Organizational Assessment Tool can be used by organizations in any sector. There are 31 items in five domains: Securing an organizational commitment to race equity work; Creating more equitable organizational culture; Recruiting, hiring, and retaining a diverse workforce; Developing accountability to and partnership with communities of color; Applying an anti-racism lens to programs, advocacy, and decision-making.
- ~ The toolkit is primarily meant for advocates working within the civil, criminal, and juvenile justice systems and their partners, although many sections will be beneficial to people from different kinds of organizations.

6 [Inclusive Dubuque's Self-Assessment for Diversity, Equity and Inclusion \(DEI\)](#)⁹ 2016 *Inclusive Dubuque*

"Inclusive Dubuque is a local network of leaders from faith, labor, education, business, nonprofit and government dedicated to advancing justice and social equity in our community" that prioritized Equity Education. Inclusive Dubuque's Peer-Learning Council developed [this assessment](#).⁹

- + 24 items in four sections: Expressed commitment to DEI; Authorization of DEI in organizational policy; Implementation of DEI practices in operations; Use of accountability mechanisms to monitor DEI. This assessment explicitly includes attention to gender, race, sexual orientation, and ability dimensions of diversity and encourages inclusion of other dimensions.
- ~ Does not cover all domains of an organizational assessment; however, it is straightforward and focuses on multiple identities.

7 [Equity Organizational Self-Assessment](#)¹⁰ *ABLE Change, Michigan State University (now hosted at System exChange)*

Helpful tool that centers youth, produced by the ABLe Change initiative at Michigan State University Department of Psychology.

- + 38 items with good descriptors in five sections: Strategic Focus on Equity; Procedural Equity; Influence Equity; Access Equity; Quality Equity.
- ~ ABLe Change weblinks are no longer active. However, limited information is available on the System exChange site.¹¹

⁸ https://justleadwa.org/wp-content/uploads/2019/08/REJI-Organizational-Toolkit_Full-1.pdf

⁹ <http://inclusivedbq.org/self-assessment-diversity-equity-inclusion/>

¹⁰ http://systemexchange.org/application/files/2315/4327/2119/ABLE_EquityOrganizationalSelf-Assessment_F.pdf

¹¹ <https://systemexchange.org>



8

Racial Justice Assessment Tool¹² 2015Western States Center

Very accessible tool centers racial justice by explicitly interrogating power and the roles of people of color and white people.



25 items in five sections: Program, Power, Policies, People, Culture.



May be better for organizations that are beyond addressing the foundational elements of serving clients (e.g., language and communication access, etc.).

9

Working Principles for Health Justice & Racial Equity Organizational Self-Assessment¹³ 2020The Praxis Project

This very accessible tool centers impacted communities and references the Praxis Project's Working Principles for Health Justice & Racial Equity. Not a healthcare-focused tool. The tool furthers the Praxis Project's aims "to improve justice and equity through partnerships to build community power," and the belief that "organized communities are critical partners in the struggle to create just and equitable communities."¹³



24 items around the five principles: Act With Care; Inclusivity; Authentic Community Collaboration; Sustainable Solutions; Commitment to Transformation. "The Praxis Project can partner with your organization in administering and facilitating the self-assessment process" for a fee, in which they "collect your programs' responses anonymously and provide you with aggregate results." They also can provide more tailored support.¹³



May be better for organizations that are beyond addressing the foundational elements of serving clients (e.g., language and communication access, etc.).

10

Diversity, Equity, and Inclusion Spectrum Tool¹⁴Meyer Memorial Trust

This tool was developed by Meyer Memorial Trust, an equity based foundation, "to help organizations assess where they are on their DEI journey and to identify potential areas for future work. It is also intended to provide shared language to help Meyer staff and nonprofits talk together about what DEI currently looks like in an applicant's organization and opportunities for growth."¹⁴



This straightforward tool assesses the organizational change progress on a scale from "not yet started" to "exemplary/leading." It includes 12 domains: DEI vision, commitment, leadership, policies, infrastructure, and training. It is easy to understand and use because it includes descriptive examples of how to tell where the organization is for each domain along a spectrum. The tool effectively portrays DEI work as a process that occurs along a continuum of change and minimizes value judgment.



This tool works best when organizations engage a range of staff members and leaders to assess progress along the different domains, and engage in dialogue to reconcile differences of opinion. This reflection process, however, is part of the work and can accelerate change.

¹² [https://www.njcn.org/uploads/digital-library/AssessingOurOrganizations_RacialJustice%20\(1\)%20\(1\).pdf](https://www.njcn.org/uploads/digital-library/AssessingOurOrganizations_RacialJustice%20(1)%20(1).pdf)

¹³ <https://www.thepraxisproject.org/resource/2020/principles-self-assessment>

¹⁴ <https://mmt.org/news/understanding-meyers-dei-spectrum-tool>

Child- & Youth-Serving Organizations & More

+ Benefits ~ Limitations

11 [Tool for Organizational Self-Assessment Related to Racial Equity](#)¹⁵ 2014

From the *Eliminating Disparities in Child & Youth Success Collaborative*, co-convened by the [Coalition of Communities of Color](#) as part of the [All Hands Raised Partnership](#)

“This tool - developed and piloted by our Eliminating Disparities collaborative - helps leaders gain an evidence-based snapshot of practices and policies related to racial equity in their organizations. This open source tool is designed for organizations both large and small, including school districts, nonprofits, corporations, foundations and others.”¹⁵

“The All Hands Raised Partnership includes more than 300 individuals and organizations...[working together with six partner school districts] to improve educational outcomes for kids throughout Multnomah County, Oregon.”¹⁶

- + This is a comprehensive instrument/toolkit. It includes a brief overview and instructions section. There are 70 questions that appear in two formats: pages 5-10 include the questions in the recommended five-step approach for implementing the assessment while pages 11-14 list the questions in an integrated manner. Questions are in 9 subject areas: Organizational Commitment, Leadership & Governance; Racial Equity Policies & Implementation Practices; Organizational Climate, Culture and Communications; Service-Based Equity; Service-User Voice & Influence; Worker Composition & Quality; Community Collaboration; Resource Allocation & Contracting Practices; Data, Metrics & Continuous Quality Improvement. The toolkit encourages review of written policies and includes a one-page summary of results for reflecting on strengths, challenges, and 3-5 action areas.
- ~ The recommendation is to complete the assessment in 1-3 months. The stepped approach questions are grouped by response options format from a four point scale and yes/no answers to short answer and narrative type responses, reflecting a progressively more detailed and deeper analysis. However, the tool is flexible and adaptable.

¹⁵ <https://www.coalitioncommunitiescolor.org/research-and-publications/cccorgassessment>

¹⁶ https://allhandsraised.org/content/uploads/2015/01/AHR_Ch02_FINAL-5.pdf

12 Cultural and Linguistic Competence Family Organization Assessment Instrument¹⁷ 2010 Georgetown University National Center for Cultural Competence

"Specifically developed to address the unique functions of family organizations concerned with children and youth with behavioral-emotional disorders, special health care needs, and disabilities."¹⁷

+ "Very comprehensive instrument; captures a wide range of data including: *Our World View, Who We Are, What We Do, and How We Work.*" There is an accompanying Guide for Using the Cultural and Linguistic Competence Family Organizational Assessment Instrument.¹⁶

~ Its comprehensive nature means more planning and preparation are needed; still, there is a helpful guidance document.

13 CLC Assessment Tool: Based on the National Standards for Culturally and Linguistically Appropriate Services in Health and Health Care (CLAS Standards)¹⁸ June 2016

Lauren Acevedo, Covian Consulting for SAMHSA & TA-Network

Prepared for the National Technical Assistance Network for Children's Behavioral Health, funded by SAMHSA. The "Assessment Tool utilizes the National CLAS Standards and their expanded definition of culture to assess the cultural and linguistic competence of organizations and service providers in the behavioral health field."¹⁸

Aligned with the System of Care core value of Cultural and Linguistic Competence in services and supports provided to children, youth and families.

+ Very comprehensive tool with 75 items over six domains - the four main National CLAS Standards themes (Principal Standards; Governance, Leadership and Workforce; Communication and Language Assistance; Engagement, Continuous Improvement, and Accountability), and two additional domains: Family Acknowledgement, and Spiritual and Cultural Beliefs in Treatment and Discharge. "It is designed for use as a quality assurance tool while reviewing an organization's CLC Plan (or other strategic planning document addressing CLC). Furthermore, it is a tool to measure operationalization or implementation of cultural competence."¹⁸

~ Requires significant planning and preparation. Aside from the instrument itself, it is difficult to find supporting information or references even from the sponsoring organizations.

¹⁷ <https://nccc.georgetown.edu/assessments/clcfoa.php>

¹⁸ http://cfs.cbcs.usf.edu/projects-research/_docs/CLASStandardsCLCAssessmentTool_FINAL.pdf

Disability Organizations

+ Benefits ~ Limitations

14 [The Cultural and Linguistic Competence Assessment for Disability Organizations \(CLCADO\)](#)¹⁹ 2010 *National Center for Cultural Competence, Georgetown University Center for Child and Human Development, now the Georgetown University National Center for Cultural Competence*

"The CLCADO is intended to support organizations to (1) plan for and incorporate culturally and linguistically competent values, policies, structures, and practices in all aspects of their work; (2) enhance the quality of services, supports, and advocacy provided to diverse and underserved communities; (3) effect change in education, training, technical assistance, research, and public policy; and (4) advance cultural and linguistic competence as an essential approach to address racial and ethnic disparities and promote equity for people who experience disabilities and their families."¹⁹

+ Very comprehensive instrument that addresses "the attitudes, behaviors, policies, structures, and practices of an organization, including but not limited to, those of its board, staff, faculty, consultants, contractors, advisory groups, and volunteers. The process should also elicit the experiences and opinions of the individuals and communities served."¹⁹ There is a companion *Guide for Using the Cultural and Linguistic Competence Assessment for Disability Organizations*.

~ Requires significant planning and preparation.

¹⁹ <https://nccc.georgetown.edu/assessments/clcado.php>


Educational Organizations – K-12


 Benefits  Limitations

15 [Equity Audit from the Mid-Atlantic Equity Consortium \(MAEC\)](#)²⁰

Three of their Equity Audit tools combined into one file:

- Criteria for an Equitable School;
- Criteria for an Equitable Classroom; and
- Teacher Behaviors that Encourage Student Persistence.


 126 items over the three tools. Comprehensive and manageable instrument with topical subsections in each tool. I: 69 questions across School Policy, School Organization/ Administration, School Climate/Environment, Staff, Assessment/Placement, Professional Learning, Standards and Curriculum Development. II: 26 questions across Academic Placement/Tracking and Grouping, Student Leadership & Recognition, Classroom Environment, Instructional Strategies. III: 31 questions across Instructional Interventions, Curriculum Interventions, Classroom Management Interventions, Interpersonal Interventions.

 There may be additional dimensions that aren't covered; however, this comprehensive instrument is a very good start. Tools not to be reproduced without permission of MAEC; MAEC can provide assistance/TA.

16 [Building For Equity School Self-Assessment Tool](#)²¹ 2020 [Center for Collaborative Education](#)

"The goal of this needs assessment is to determine a school's readiness for culturally responsive, student-centered learning and to support the strategic planning process."²¹ This Assessment is part of the *Building for Equity* framework, which is "centered on ensuring equitable student outcomes, the result of aligned and equity-focused people, policies, processes, and practices."²²

 38 items in five domains: Culturally Proficient Teachers and Leaders; Inclusive School Culture; Student-Centered Academic Learning; Supportive Resources; Engaged Community. The *Building for Equity* framework has a [Guide for Inclusive School Redesign](#).²³

 There may be additional dimensions that aren't covered; however, this accessible instrument with many complementary resources is a very good start.

²⁰ <https://maec.org/resource/equity-audit-materials/>

²¹ https://www.cce.org/uploads/files/O2-CCE-BuildingforEquityTools_School-Self-Assessment-Tool.pdf

²² <https://www.cce.org/uploads/files/CCE-BuildingforEquity.pdf>

²³ <https://www.cce.org/equityguide>

Workforce Development Organizations

+ Benefits ~ Limitations

17 Workforce Development Racial Equity Readiness Assessment Tool²⁴ 2018 *Race Forward & Center for Social Inclusion (CSI)*



Toolkit “for workforce development organizations and practitioners to evaluate their programs, operations, and culture” and “to familiarize themselves with various practices and policies that support institutional racial equity, evaluate their current efforts, and plan action steps.”²⁴

- + Straightforward and accessible tool/toolkit. There are 22 Racial Equity Readiness Indicators, over five Key Areas (domains): Mission, Values, and Culture; Customer Access to Services and Tracking Racial Disparities; Curriculum and Client Services; Leadership and Staff Morale; External Relationships and Advocacy. The Guiding/Core Principles that provide the framework for analysis are: Stakeholder Engagement; Race-Explicit Strategy; Outcome Oriented; Systemic Analysis; and Culture of Practice.
- ~ The formatting of the instrument elicits more qualitative input/narrative explanation. This is clearly meant as a prompt for discussion.

²⁴<https://www.raceforward.org/practice/tools/workforce-development-racial-equity-readiness-assessment>



18 [Austin Equity Assessment Tool](#)²⁵ 2017 *City of Austin Equity Office*

The eight page Equity Assessment Tool is included as Appendix A in the Second Equity Assessment Report (Analysis of Department Responses to the Equity Assessment Tool 2018).²⁵ The City of Austin refined the tool after the 2017 pilot with eight departments.

-  "Tool can be used across City departments during the budget process . . . to implement new policies, practices, and programs to help identify and address the inequities that impact the quality of life for low-income communities in Austin, which are disproportionately communities of color." Austin was recognized in 2019 by the Open Government Partnership²⁶ "for innovative design and transformative potential impact" with "their most prestigious designation of "Star" commitment."²⁵
Comprehensive tool assesses four domains: Departmental Analysis, Engagement, Budget, and Alignment (with Council's Priorities).
-  Very budget- and policy-focused; missing some organizational elements. Still, it's a municipal government focused tool.

19 [Portland Racial Equity Roadmap Assessment](#)²⁷ *City of Portland, OR, Office of Equity and Human Rights*

The structured tool is for bureaus to assess themselves before developing five-year Racial Equity Plans. There is an informative companion [Racial Equity Plan Manual](#).²⁸

-  Comprehensive Excel spreadsheet instrument with 41 measures across six domains: Organizational Commitment; Leadership & Management; Workforce; Community Access & Partnership; Contracting; Data, Metrics & Continuous Quality Improvement.
-  Complex and thorough tool that will require a significant commitment of time and energy to implement as intended.

²⁵ <http://www.austintexas.gov/edims/pio/document.cfm?id=333093> and <http://www.austintexas.gov/department/operationalizing-racial-equity>

²⁶ <https://austintexas.gov/department/equity-office>

²⁷ <https://www.portlandoregon.gov/oehr/article/565722>

²⁸ Instructions for Roadmap Assessment begin on page 7, <https://www.portlandoregon.gov/oehr/article/564886>

Local Health Departments

+ Benefits ~ Limitations

20 Local Health Department Organizational Self-Assessment for Addressing Health Inequities²⁹ 2010 *Bay Area Regional Health Inequities Initiative (BARHII)*

This is a comprehensive Toolkit and Guide to Implementation “intended . . . to encourage a dialogue among senior managers and staff in local health departments to re-examine their collective understanding of and ability to address the underlying causes of health inequities.”²⁹

- + This is a comprehensive Toolkit and Guide to Implementation “intended... to encourage a dialogue among senior managers and staff in local health departments to re-examine their collective understanding of and ability to address the underlying causes of health inequities.”²⁹
- ~ This multi-component toolkit takes a very significant amount of dedicated time and resources to implement all the various components.

Healthcare Providers

21 Cultural and Linguistic Competence Policy Assessment³⁰ 2006 *Georgetown University National Center for Cultural Competence*

Developed at the request of the Bureau of Primary Health Care, Health Resources and Services Administration, U.S. Department of Health and Human Service. “The CLCPA is intended to support community health centers on: (1) improve health care access and utilization, (2) enhance the quality of services within culturally diverse and underserved communities, and (3) promote cultural and linguistic competence as essential approaches in the elimination of health disparities.”³⁰

- + Very comprehensive instrument examines values, policy, structure, and practice. 51 items (many with multiple sub-items) in seven domains: Knowledge of Diverse Communities; Organizational Philosophy; Personal Involvement in Diverse Communities; Resources and Linkages; Human Resources; Clinical Practice; Engagement of Diverse Communities. There is an accompanying Guide for using the CLCPA.
- ~ More comprehensive means more planning and preparation needed; still, there is a helpful guidance document, *[A Guide for Using the Cultural and Linguistic Competence Policy Assessment](#)*.³⁰

²⁹ <https://www.barhii.org/organizational-self-assessment-tool>

³⁰ <https://nccc.georgetown.edu/assessments/clcpa.php>

22 HRET HIIN Health Equity Organizational Assessment (HEOA)^{31, 32} 2018 *Health Research and Educational Trust*

This tool, developed for the Centers for Medicare & Medicaid Services (CMS), was created for hospitals to support the reduction of disparities in care by identifying the level of implementation in seven assessment categories. Note that five of the seven categories relate to the organization's data capacity. The Washington State Hospital Association the [original HRET HIIN tool](#) available.³⁰ The Michigan Health and Hospital Association has a [helpful questionnaire instrument](#) available.³²

- + Excellent tool for focusing attention on improvement of data capacity. 15 items across seven assessment categories: 1) data collection, 2) data collection training, 3) data validation, 4) data stratification, 5) communicate findings, 6) address and resolve gaps in care, and 7) organizational infrastructure and culture.
- ~ HRET, the not-for-profit research and education affiliate of the American Hospital Association, is not currently supporting the use of this instrument as it was part of a CMS initiative. However, the resources are available through several State Hospital Associations, and the Michigan Health & Hospital Association Keystone Center has produced a robust [Eliminating Disparities to Advance Health Equity and Improve Quality](#)³³ report and is providing an [online tracking system and support](#).³⁴

23 Inclusion Scorecard for Population Health (ISPH)³⁵ 2020 *Impact4Health*

The Scorecard is a customized online dashboard of best practices designed for to address health care inequities as part of a comprehensive Population Health Management Strategy through the lens of Diversity, Inclusion and Health Equity.

Each item is also linked to a knowledge base of resources that supports adoption of the best practice.³⁵

- + Contains over 70 best practices that address four distinct areas of activity: tracking key metrics about the population served and the overall diversity of staff at all levels, building a culture of inclusion throughout the health system, creating greater accountability among leaders to address health disparities and developing higher engagement with diverse community stakeholders. Free access to the online platform.
- ~ Access to the comprehensive free online instrument is available only by contacting Impact4Health. They can also provide support and TA.

³¹ http://www.wsha.org/wp-content/uploads/Health-Equity-Metric-Guidance_WSHA.pdf

³² [https://www.mha.org/Portals/0/Images/MHA Keystone Center/health_equity_organizational_assessment.pdf](https://www.mha.org/Portals/0/Images/MHA%20Keystone%20Center/health_equity_organizational_assessment.pdf)

³³ https://www.mha.org/Portals/0/Images/MHA%20Keystone%20Center/health_equity_guide.pdf

³⁴ <https://www.mha.org/Health-Disparities>



³⁵ <http://www.impact4health.com/population-health-1>

Food Security Organizations

 Benefits  Limitations

24 Racial Equity Chapter (10)³⁶ of the Self-Assessment Workbook for the Hunger Free Communities Network³⁷ 2018 *Alliance to End Hunger*

“The Self-Assessment Workbook is a tool to build the capacity of the Hunger Free Communities Network... [it] assesses the capacity of a coalition and/or backbone support organization in 10 areas including Racial Equity.” The tool is designed for guided self-assessment where “the facilitator(s) and participants meet and discuss each capacity sub-area to reach a consensus on where the organization sits currently along a continuum of capabilities.”³⁷

-  This instrument explicitly prioritizes a collaborative group process. The Racial Equity section includes 33 discussion prompts in four sub-sections: Need and Capacity; Organizational Buy-In; Analysis and Evaluation; Planning and Intervention. The Racial Equity Section can be used by coalitions in other domains; the strength of the tool is that it is part of a broader instrument designed for network organizations, including prospective and informal networks.
-  The links for some of the resources built into the tool (such as from the Racial Equity Tools website) are no longer live, so accessing those resources will entail some extra effort; the instrument itself works well.

³⁶ <https://alliancetoendhunger.org/wp-content/uploads/2018/10/SAW-for-HFC-10-Racial-Equity.pdf>

³⁷ <https://alliancetoendhunger.org/wp-content/uploads/2018/11/SAW-for-HFC-Sept-2018.pdf> and <https://alliancetoendhunger.org/what-we-do/hunger-free-communities/self-assessment-workbook-for-hfcs/>

Race Equity Impact Assessments/ Equity Impact Review Tools³⁸

+ Benefits ~ Limitations

A [GARE Racial Equity Toolkit: An Opportunity to Operationalize Equity](#)³⁹ Updated 2016 [Government Alliance on Race & Equity \(GARE\)](#)

This Racial Equity Tool can be used by community based organizations, government staff and elected officials. It is a series of questions that should be considered while early in the development process, and can also be revisited in the implementation and evaluation phases.

“Racial equity tools provide a structure for institutionalizing the consideration of racial equity.”³⁹

The GARE website offers many tools and resources.

+ “Racial equity tools are designed to integrate explicit consideration of racial equity in decisions, including policies, practices, programs, and budgets. It is both a product and a process. Use of a racial equity tool can help to develop strategies and actions that reduce racial inequities and improve success for all groups . . . When racial equity is not explicitly brought into operations and decision-making, racial inequities are likely to be perpetuated.”³⁹

Appendix D lists 13 agencies/organizations that applied a Racial Equity Tool in Madison, WI, including the public health, planning, out-of-school time partners, and parks entities.

The City of Seattle in Washington and Multnomah County in Oregon are also mentioned in the toolkit. The website lists many other examples.

~ It’s important to be clear that this tool is not an organizational assessment.

B [Seattle Racial Equity Toolkit to Assess Policies, Initiatives, Programs, and Budget Issues](#)⁴⁰

Seven page toolkit; The Racial Equity Analysis is made up of six steps, on two page worksheet.

+ Straightforward examples.

~ It’s important to be clear that this tool is not an organizational assessment.


³⁸ Race Forward Racial Equity Impact Assessment overview and guide https://www.raceforward.org/sites/default/files/RacialJusticeImpactAssessment_v5.pdf


³⁹ <https://www.racialequityalliance.org/resources/racial-equity-toolkit-opportunity-operationalize-equity/>

⁴⁰ http://www.seattle.gov/Documents/Departments/RSJI/RacialEquityToolkit_FINAL_August2012.pdf

C Center for the Study of Social Policy's Race Equity Impact Assessment⁴¹


"The Annie E. Casey Foundation's Race Matters race equity impact assessment tool [was used] as a template to develop an assessment tool that is tailored to child welfare policy decision-making."⁴¹


 Two page tool; questions on one page.

 It's important to be clear that this tool is not an organizational assessment.

D Food System Racial Equity Assessment Tool⁴²

Part of A Facilitator's Guide From University of Wisconsin-Extension, Cooperative Extension, 2017

 Five page tool provides nice background/framing, key definitions and suggested ground rules, as well as instructions to accompany the Racial Equity Assessment Tool.

 It's important to be clear that this tool is not an organizational assessment.

⁴¹ <https://cssp.org/wp-content/uploads/2018/08/Race-Equity-Impact-Assessment-Tool.pdf>

⁴² <https://cdn.shopify.com/s/files/1/0145/8808/4272/files/G4134.pdf>