

Transforming Organizational Culture Assessment Tool (TOCA)

Maggie Potapchuk, MP Associates

Please read this explanation prior to using the Transforming Organizational Culture Assessment tool.

We swim in white dominant culture every day, and we each have different racialized experiences in noticing its presence as well as its impact on us individually and on our organizational culture. The Transforming Organizational Culture Assessment tool is meant to hold up the mirror to an organization's culture. It is meant to be a resource in developing a roadmap for what a racially just organization might look like. It is meant to assist in creating benchmarks for moving forward; and, it is meant to provide a vehicle for people to share their truth. Sometimes in our urgent need to move toward racial justice, we assign judgment on who is good or bad, and use tools, such as TOCA, as hammers rather than as catalysts for change.

I encourage you to remember "both and" as you move through this exciting, frustrating, sometimes conflictual, as well as empowering, invigorating and unifying dynamic change process for racial justice – remembering our accountability for our individual role and behaviors, our linked fate within the organization and the community, our commitment to support each other through the process, and also the critical importance of re-imagining what is possible.

The Transforming Organizational Culture Assessment (TOCA) tool can be a helpful instrument for deepening internal organizational work on advancing racial equity, by specifically addressing white dominant culture.¹ The impact on an organization when white dominant culture is not consistently addressed can include:

- Staff feeling they have limited freedom to offer different ideas in problem-solving, decision-making etc. resulting in individuals within the organization holding back perspectives and insights so as to not cause conflict
- Individual mistakes being focused on and identified rather than systemic challenges
- Decision-making processes without transparency or accountability and likely with power hoarding
- Discussions about outcomes that prioritize numbers rather than including anecdotal or observational data
- Tokenizing and burdening Black, Indigenous, and other People of Color (BIPOC) in general and especially in regard to resolving issues within the organization about racism
- A pattern of BIPOC staff and trustees leaving the organization, without an examination of the messages and practices within the culture of the organization that could be the catalyst for these departures and not acting to address them
- Transactional relationships with partner organizations that don't have accountability practices in place
- Communications reflecting how power is distributed within the organization, e.g., with minimal or no engagement, transparency, or communication with the people most impacted and with people who are not in formal leadership positions

¹ White Dominant Culture is defined as "dominant, unquestioned standards of behavior and ways of functioning embodied by the vast majority of institutions in the United States. Because it is so normalized it can be hard to see, which only adds to its powerful hold. In many ways, it is indistinguishable from what we might call U.S. culture or norms – a focus on individuals over groups, for example, or an emphasis on the written word as a form of professional communication. But it operates in even more subtle ways, by actually defining what "normal" is – and likewise, what "professional," "effective," or even "good" is. In turn, white culture also defines what is not good, "at risk," or "unsustainable." White culture values some ways – ways that are more familiar and come more naturally to those from a white, western tradition – of thinking, behaving, deciding, and knowing, while devaluing or rendering invisible other ways. And it does this without ever having to explicitly say so." Gulati-Partee, Gita, and Maggie Potapchuk. "[Paying Attention to White Culture and Privilege: A Missing Link to Advancing Racial Equity](#)." *The Foundation Review* 6, no. 1 (2014): 25-38. Sometimes it is also referred to as white supremacy culture. For this document, we differentiate and name the system of white supremacy and use the definition from [Dismantling Racism Works Web Workbook](#), "Drawing from critical race theory, the term "white supremacy" also refers to a political or socio-economic system where white people enjoy structural advantage and rights that other racial and ethnic groups do not, both at a collective and an individual level."

- Strategic plans being created based on the organization’s definition of the problem and in-house development of the solution with accountability to only the board and funders and not to people most impacted

As an assessment tool, TOCA can be used to begin or continue a discussion about the impact of an organization’s culture on individuals and systems and to begin to consider some ideas about how to align practices with the organizational racial equity and justice values. The data collected will inform organizations about:

- the implicit and explicit use of terms in the organization’s communications;
- the progress of normalizing discussions about racism, power, and privilege;
- reflections on how white dominant culture manifests along with the presence of equitable practices; and
- the opportunities and challenges in moving forward on the organization’s racial equity change process.

Throughout the TOCA tool, there are opportunities for participants to share stories about the impact of policies and practices. Additionally, the responses from the TOCA tool can help organizations prioritize what needs to be addressed and begin to identify the strategies and practices to adopt. Practice has shown that the best way to do this is by engaging a Racial Equity Leadership Team, made up of people who represent different identities and roles within the organization and collectively create an organization’s racial equity roadmap.² Keep in mind that one characteristic of white dominant culture is a need to resolve or fix something quickly rather than spending time getting to the root cause or seeing it from multiple perspectives to really understand the problem and to generate options to address the issue systemically.

Please answer these questions to determine whether your organization is prepared use the *Transforming Organizational Culture Assessment* tool in your organization:³

Does your organization have a common understanding of structural racism and white dominant culture?

Assess whether the staff has a basic conceptual understanding of structural racism, white dominant culture and racial equity. It is important for the organization to have a common understanding of key terms to be able to make full use of the TOCA tool. Staff may be at different places in their complete understanding of the terms, though the organization has a clear commitment to support staff (and other stakeholders’, e.g., board, volunteers) in learning about and deepening their knowledge about these concepts. Without at least a basic common understanding of racism and white privilege, the tool can become a frustrating exercise that yields minimal or confusing dialogue about data and misses the opportunity to co-create next steps in the organization’s racial equity change process. Keep in mind there will be a spectrum of knowledge levels within the organization. The question being posed is less about whether there is consensus regarding the terms or meeting an educational benchmark and rather about whether the organization will/has provided educational opportunities prior to introducing TOCA tool and is committed to creating an ongoing learning process to support individual and collective learning.

² Potapchuk, Maggie. [Operationalizing Racial Justice for Non-Profit Organizations](#). MP Associates (2020).

³ To understand more about a racial equity organizational change process, see Potapchuk, Maggie. [Operationalizing Racial Justice for Non-Profit Organizations](#). MP Associates (2020), which provides information on some key steps as well as specific tools and resources.

Has your organization made a commitment to operationalize racial justice?

Information collected from this tool will reveal people's different perceptions about how the organization is doing in its efforts toward operationalizing racial justice. Prior to people sharing their perceptions and observations using this tool, it is important for the organization to commit to a process for reviewing the information and addressing staff's hopes, concerns and identified barriers. Without this commitment, participants may be wary about answering candidly or will doubt the usefulness of this process. One best practice is to create a working group focused on guiding a change process to align policies, practices, and culture with the value of racial equity. The formal leaders of the organization and members of the Racial Equity Leadership Team, mentioned earlier, are committed to being the guides, messengers, and catalysts to advance racial justice within the organization.

If your organization can't answer yes to both of these questions and is therefore not prepared to use this tool yet, there are several resources that can assist you located on www.racialequitytools.org - such as the two sections on Organizational Change.



The TOCA tool has five sections:

1. Information about the Survey Participant
2. Being Explicit about Racial Equity in Organization's Communications
3. Talking about Racism, Power, and Privilege
4. Identifying White Dominant Culture and Racially Equitable Practices
5. Reflecting on Racial Equity Change Process - Individual and Organization

Keys to Implementing the Transforming Organizational Culture Assessment Tool:

- The TOCA tool is NOT a diagnostic tool, nor does it provide statistical evidence of an organization's capacity to work toward racial justice. It is a reflection tool, a vehicle to share truths about racism and white dominant culture and to learn from colleagues of areas of perceived progress as well as areas the organization needs to address. The TOCA tool does not include a scorecard. It is important to review the quantitative data, and also to read through the comments and identify the themes, patterns, as well as anomalies.
- Depending on the design of your organizational change process and the data and discussions you have had to date, you may choose to use one section at a time or use all five sections to conduct a comprehensive assessment. Reflect on where your organization is in its change process. What is the intent and goal for use of the data? What information is needed to deepen the work? For example, the organization may base its progress on the level of discussion about racial equity in training sessions and may be unaware that it is less common to have these discussions or to give feedback when racial microaggressions occur. This would imply that it might be helpful to do a short survey using the questions from Section 3.
- Invest time in discussing the TOCA tool in advance. Create a plan and be transparent about how the information will be analyzed and shared back. It is important for the organization to make a commitment to be responsive to the feedback and stories and to create an action plan based on the information received. Again, an internal team can guide this process and be responsive to concerns that may

arise. Also, in preparing everyone to complete the TOCA tool, it might be helpful to share information about different terms⁴ used in the TOCA tool. For example, in Section 2, people are asked to distinguish between implicit and explicit use of terms in different communication vehicles. It may be helpful to provide specific organizational examples so people understand the difference, including what implicit/explicit may look like in the context of this assessment tool.

- It is critical for organizational members/employees to share their truths with full candor and without risk of negative consequences, especially individuals who may be marginalized in the organization. Discuss the organization's practices that can be adopted and messages that will be shared in advance to ensure the assessment process reflects this commitment.
- People's anonymity must be preserved, unless *everyone* agrees that their responses will be shared with the full group. If that is not the case, it may be helpful to have a multiracial consulting team with experience supporting racial equity change processes who can review and synthesize results, and work with formal and informal leaders to share back the different perspectives to the full team in order to ensure confidentiality of individual voices. Another option is to identify a couple of people who are trusted within the organization to compile the results and keep the anonymity of the responses. It's imperative to have transparent practices in place before implementing TOCA to honor confidentiality and ensure the organization prevents any harm or consequences for people speaking their truths.
- Disaggregating data by race, gender and other identities can be helpful in order to identify patterns that may be more noticeable or consequential to people with marginalized identities. Consider different options of disaggregating the data if there are relatively small numbers of a particular race and/or gender or other identity groups within your organization. You can disaggregate the data, based on larger data categories (e.g., Black, other people of color, and white people) or you can create other options based on the current demographic makeup of your organization. What is most important is that you create alternatives ways of reporting or work with an outside group to ensure that people in smaller identity groups have their truths shared, that organizational patterns are identified, and also that individual voices are kept confidential.
- Customization is encouraged. This tool will not fit all organization types. The TOCA tool is designed for a range of organizational sizes (from small to large) that have both a staff and a board. The examples reflect nonprofits more than other types of organizations. Customize the TOCA tool so the questions, terms, and choices reflect your organization. If you are customizing questions or statements, stretch as you make decisions about the spectrum of choices that are currently listed. Throughout the tool there are notes to aid in customization. At a certain point, decisions about edits were made to work for most nonprofit organizations, knowing that the TOCA tool will never be all things for all organizations. On the other hand, there are a lot of questions and options provided in the attempt to reflect the breadth of organizations, so identifying questions most relevant (especially for future tracking) may be necessary to match the stamina and the attention of the people responding. Though the questions are geared toward staff, it is equally important to collect responses from board members and other stakeholders who are involved with your organization, e.g., volunteers, members and/or clients.

⁴ www.RacialEquityTools.org [Glossary](#), MP Associates, Center for Assessment and Policy Development and World Trust Educational Services, 2019.



Acknowledgements:

My appreciation to several people who shared their insights on white dominant culture over the years, which helped inform this tool - specifically: A. Adar Ayira, Donna Bivens, Dottye Burt-Markowitz, Shakti Butler, Lila Cabbil, Gita Gulati-Partee, Sally Leiderman, Dianne Lyday, Simran Noor, Avis Ransom, and Sonali Sangeeta-Balajee. Also, much gratitude to Diane Goodman, Gita Gulati-Partee, Gail Harrison, Alfredo Hernandez, Sally Leiderman, Jesse Villalobos, and Scott Winn, who reviewed TOCA tool and generously made several suggestions and additions for the 2016 edition. For the 2020 edition, my gratitude and appreciation to Aharisi Bonner, Jenny Dodson Mistry, Diane Goodman, Gita Gulati-Partee, Cyndi Harris, Annie McKay, Cynthia Newcomer, Kyle Rinne-Meyers, Brigette Rouson, Suprotik Stotz-Ghosh, Sarah Tooley, Scott Winn, and Winnie Ye for their feedback and edits of the TOCA tool. Thank you to the KUOW Racial Equity Team for sharing their customization of the TOCA Tool which helped inform the 2020 update. Special thanks to Linda Guinee, for her skillful editing and support, and for helpful advice during the editing process. Also, gratitude for the support from the Borealis Racial Equity to Accelerate Change (REACH) Fund.

Also, I am indebted to friends, colleagues, and mentors I have worked with over the years who were supporters, listeners, thought partners, provocateurs, and storytellers. I deeply thank them for generously sharing their knowledge, insights, feedback, and skills with me. Also, my gratitude to organizations I have worked with over the years, who shared their lessons, their challenges, and their progress with me and continue to push, inform, and provoke my own learning and practices.

The following are some of the many resources which were helpful in the development of the TOCA tool (2016 & 2020):

- N. Aruliah, S. Balajee, S. Butler, B. Calhoun, D. Goodman, S. Leiderman, E. Morrison, and M. Potapchuk. [Decentering Whiteness and Creating Inclusive and Equitable Conferences: A Tip Sheet](#). Working Group on Developing Critical Literacy for Transforming the Legacy of Colonization and Whiteness (December 2015).
- Barndt, Joseph. *Understanding and Dismantling Racism: The Twenty-First Century Challenge to White America*. Minneapolis, MN: Fortress Press, 2007, p. 234.
- BlackSpace. "[Black Space Manifesto](#)." (2020).
- Brewer, Laura. How to Make Space workshop (2020).
- Dias, Robette Ann. "[Transforming Institutional Values: Revisited](#)." (2008).
- dRworks [Dismantling Racism Works Web Workbook](#)
- Jones, Kenneth, and Tema Okun. *White Supremacy Culture*. ChangeWork (2001).
- Katz, Judith. "[Some Aspects and Assumptions of White Culture in the United States](#)." (1990).
- Major, Barbara. "How Does White Privilege Show up in Foundation and Community Initiatives?". [In Flipping the Script: White Privilege and Community Building](#), edited by Maggie Potapchuk, Sally Leiderman, Donna Bivens and Barbara Major, 71-79. Baltimore, MD: MP Associates and Center for Assessment and Policy Development, 2005.
- Menakem, Resma. *My Grandmother's Hands: Racialized Trauma and the Pathway to Mending Our Hearts and Bodies*. Las Vegas, NV: Central Recovery Press, 2017, pp. 97-110.
- Okuno, Erin, "[Five Ways to Center People of Color](#)," *Fakequity*, April 20, 2018.
- Partners for Collaborative Change. [White Dominant Culture & Something Different: A Worksheet](#). (2019).
- Poblano, Lupe, "[Challenging White Dominant Culture: Time to Look in the Mirror](#)," *CompassPoint*. *CompassPoint*, 2020.

Transforming Organizational Culture Assessment Tool

SECTION 1: Information about the Survey Participant*

1. How do you describe your racial identity? Check all that apply.

- African American/Black/African Caribbean
- Asian American/Pacific Islander
- Latinx
- Native American/Indigenous to Americas (e.g. Indio from Central America)
- South West Asian and North African⁵
- White
- Multiracial
- If not listed, please specify _____

2. How do you describe your gender? Check all that apply.

- Woman
- Man
- Transgender
- Non-binary
- Cisgender
- Gender non-conforming
- Prefer not to share
- If not listed, please specify _____

3. How do you describe your relationship with the organization?

- Upper Management
- Middle Management
- Entry-level
- Frontline
- Board member
- Worker-owner
- Volunteer

⁵ “South West Asian and North African is a decolonial word for a region in place of Middle Eastern, Near Eastern, Arab World or Islamic World that have colonial, Eurocentric, and Orientalist origins and are created to conflate, contain and dehumanize.” Read more at [SWANA Alliance](#).

- Community member
- If not listed, please specify _____

4. How long have you been employed and/or affiliated with the organization?

- 0-1year
- 2-5 years
- 6-10 years
- 11-15 years
- 16-20 years
- More than 20 years

***Customization Note:** *It will be important to customize this section to reflect your organization's terms and/or add questions to track other identities, departments and/or involvement with the racial equity change process.*

SECTION 2: Being Explicit about Racial Equity in the Organization’s Communications

5. This question begins to track how the organization is talking about its change process, what terms (e.g. racism, power and privilege) are being used in key documents and communication vehicles, and whether survey participants perceive their use to be implicit or explicit. Please indicate the extent to which you think or you know that certain terms are part of various organizational documents, using the numbers from the following rating scale.

0 = Not applicable – the document does not exist

1 = You **do not think/know the term is used** in a particular document/communication vehicle

2 = You **think/know the term is not used but it is implied/implicit** by the content shared

3 = You **think/know the term might be mentioned** in the document **though it is not discussed**

4 = You **think/know the term is explicit** in how it is shared – **by explaining or making a case or making a substantive comment**

For some of the documents listed, you may not know if a certain term is used implicitly or explicitly. There is no need for you to review the document, just share your perception.

Here is an example about using the term “Equity” to provide more guidance to help with choosing your ratings.

- Example for rating 2: *Equity is not used but it is implied/implicit*: “We believe all children should have access to good education.”
- Example for rating 3: *Equity is mentioned but not discussed*: “We believe in creating equitable schools.”
- Example for rating 4: *Equity is used and explicit*: “We know that operationalizing equity in all schools will ensure students attend well-funded schools, with highly trained teachers, with current technology, and are fully supported to achieve their potential.”

Following this chart, please share more about decisions to use different terms and some of the challenges in question 6 and 7.

TERMS/KEY DOCUMENTS*	Vision & Mission Statement	Strategic Plan	Theory of Change	Website	Staff Handbook and Policies	Materials for Donors or Foundations	Program Materials	Newsletter/ Social Media	Annual Report
Racial equity									
Social justice									
Racism									
white privilege									

TERMS/KEY DOCUMENTS*	Vision & Mission Statement	Strategic Plan	Theory of Change	Website	Staff Handbook and Policies	Materials for Donors or Foundations	Program Materials	Newsletter/Social Media	Annual Report
Structural or systemic racism									
Anti-racism									
Racial Disparities/Inequities									
Cultural Competence									
Fairness									
Diversity & Inclusion									
Equity									
white dominant culture									

***Customization Note:** You may want to list different items in the top row to reflect your organization’s materials and what is most important for you to track. Also, you may want to change the list of terms (these are by no means all encompassing). We encourage you to provide a spectrum and to stretch the organization to its aspirations.

6. Please share any comments about what terms are used and not used in your organization.

7. What are some of the challenges using some of these terms? What information or supports would help to address these issues?

SECTION 3: Talking about Racism, Power, and Privilege*

8. This question is designed to help you reflect on your experience with internal conversations and expectations regarding discussions about race, racism, and white privilege in your organization. It is focused on conversations about your organization specifically (e.g., policies, hiring, decisions etc. and/or the organization’s work) rather than current events. Some of the questions delineate whether there is a difference in support or encouragement by leadership or by staff. “By leadership” refers to formal leaders with senior positional power within the organization, and the broad use of staff refers to individuals who are not in formal leaders. After the chart, please provide examples or explanations of your ratings.

To what extent do you agree with the following statements (please mark the most appropriate response for each row):	0 <i>Unsure</i>	1 <i>Strongly Disagree</i>	2 <i>Disagree</i>	3 <i>Strongly Agree</i>	4 <i>Agree</i>
Talking about racism is common and welcomed in the organization.					
Talking about white privilege is common and welcomed in the organization.					
Most leaders supports people who share situations involving racism and/or racial microaggressions in the organization.					
Most staff are supportive of people who share situations involving racism and/or racial microaggressions in the organization.					
If someone raises an issue about racism, typically the person is marginalized and/or receives pushback for raising the issue.					
If someone raises an issue about white privilege, typically the person is marginalized and/or receives pushback for raising the issue.					
Most staff have the confidence and skills to give feedback about situations involving race or racism					
Most leaders have the confidence and skills to give feedback about situations involving race or racism.					
Giving feedback to leadership about a comment made or attitude expressed about race/racism is typically welcomed.					
Most leaders address any feedback they receive about a comment made or an attitude expressed.					
Giving feedback to staff members about a comment made or attitude expressed about race/racism is typically welcomed.					

To what extent do you agree with the following statements (please mark the most appropriate response for each row):	0 Unsure	1 Strongly Disagree	2 Disagree	3 Strongly Agree	4 Agree
Most staff address any feedback they receive about a comment made or an attitude expressed.					
Talking through conflict/ different perspectives about racism is welcomed by most leadership.					
Talking through conflict/ different perspectives about racism is welcomed by most staff.					
Discussing how white privilege and/or white dominant culture may be operating within in the organization is welcomed by leadership.					
Discussing how white privilege and/or white dominant culture may be operating within in the organization is welcomed by most staff.					
Discussing whether or how a decision may be reinforcing white dominant culture and/or privileging whites in the organization is encouraged by leadership.					
Discussing whether or how a decision may be reinforcing white dominant culture and/or privileging whites in the organization is encouraged by most staff.					
Discussing the impact of a decision and whether racial inequities may result (even unintentionally) is welcomed by leadership.					
Discussing the impact of a decision and whether racial inequities may result (even unintentionally) is welcomed by most staff.					

***Customization Note:** It may be helpful to add additional statements for other types of positions in the organization, such as supervisors or board members, to track more information on how conversing about racism is supported or not within the organization.

9. Please provide any comments and details about your ratings:

10. In the above statements focused on whether feedback or discussions are welcomed, please describe what happens after the issue is raised or feedback is given. Please share any challenges about the discussions. What supports would be helpful?

SECTION 4: Identifying White Dominant Culture and Racially Equitable Practices

Questions 11-17 ask for your opinion about different aspects of your organization's culture and practices by comparing two statements which reflect a spectrum of organizational behaviors and choosing the one that best reflects your organization currently.

1. First, in each Row (e.g. a, b, c), read Statement A and then read Statement B.
2. Decide which statement, A or B, best reflects your organization's *current* culture or practices. It could be that your organization is working to adopt practices that reflect Statement B, though your *current* practices are still reflective of Statement A. In that case, you would select Statement A.
3. After you decide which statement better reflects your organization, then choose whether this statement currently describes the organization well or somewhat describes the organization.
4. We are asking for your opinion, based on your experiences, observations, and perceptions. Please only select "don't know" when you really have no basis on which to offer an opinion. It is okay to share your perception, and not personal experience especially if you are newer to the organization.

Example for 11a: An organization typically provides higher rating in performance evaluations when individuals complete their workplan for the year. In the organization's discussion of adopting racial equity values, one of the values that is being considered is working collaboratively as a team and creating peer support practices. The organization is planning to change the performance evaluation, so that there is also space to include individuals and teams that work closely with you.

In this case, you would select Statement A since it currently reflects your organization's practices (even though you may be moving to adopt practices that reflect Statement B).

You would then check off #2 since the statement somewhat describes the organization and it also reflects the discussions the organization is having right now.

In the set of questions below, sometimes the term "formal leaders" is used, referring to individuals who have senior positional power within the organization. If needed, the organization may want to clarify who holds those positions in the organization.

11. Focus on the Organization’s Values and Practices:

	Statement A	<u>Statement A</u> describes the organization WELL 1	<u>Statement A</u> SOMEWHAT describes the organization 2		<u>Statement B</u> describes the organization SOMEWHAT 3	<u>Statement B</u> describes the organization WELL 4	Statement B	Don’t Know
a.	The organization values and primarily acknowledges individual achievement.						The organization values and primarily acknowledges group achievement and collaboration.	
b.	Conflict is considered something to be avoided or lessened.						Conflict is considered a healthy part of the organization’s culture.	
c.	One of the organization’s messages is: “this is the way we do things here.”						One of the organization’s messages is, “there are different ways to do the work.”	
d.	The organization allows for only limited emotional responses and discourages emotional responses that go beyond that boundary.						The organization’s supports different emotional responses to situations and provides thoughtful support.	
e.	The organization has written or unwritten guidelines regarding dress & appearance that reflect an assumption of what professionalism means.						The organization is flexible regarding dress and appearance, in the workplace, and supports individual styles, cultures, and differences.	
f.	Work is completed in silos (small groups/teams or units) with limited communication between groups.						There is communication between work teams and collaboration for individual & collective learning, including sharing mistakes.	
g.	The organization’s relationship building practices are transactional; the investment focuses on how the relationship may help to get the work done.						The organization invests in and prioritizes relationship building. Relationships remain a priority while accomplishing the work.	
h.	Well-written communication is highly valued, and all communications should reflect the organization’s internal guidelines.						Written communication is one method of communicating, along with storytelling, infographics, and other means. Editing occurs in consideration of the writer’s style and the audience.	

	Statement A	Statement A describes the organization WELL 1	Statement A SOMEWHAT describes the organization 2		Statement B SOMEWHAT describes the organization 3	Statement B describes the organization WELL 4	Statement B	Don't Know
i.	Feedback is provided to supervisees on an annual basis or as needed in the context of discipline and/or when a person is not meeting deliverables.						Feedback is provided regularly to each other with the intent to learn from each other. Making mistakes is considered part of the learning process.	
j.	Grant deliverables, annual reports, and trustee meetings are some of the important drivers in creating timelines and work plans. These items take priority over other organization's work or needs or external happenings.						Timelines are determined based on different criteria, such as past work, prioritizing relationships, assessing the impact of pace of work, external variables, and ensuring that equitable practices are used. Timelines are adaptable as issues present themselves and changes are communicated.	

Please provide any comments and/or examples about your ratings:

12. Focus on the Organization’s Hiring and Promotion Process

	Statement A	<u>Statement A</u> describes the organization WELL 1	<u>Statement A</u> SOMEWHAT describes the organization 2		<u>Statement B</u> SOMEWHAT describes the organization 3	<u>Statement B</u> describes the organization WELL 4	Statement B	Don’t Know
a.	There is a pattern of promoting primarily white employees.						There is a pattern of promoting employees who are racially diverse.	
b.	Those employees who support and adhere to the established organization’s culture are typically the ones promoted and given opportunities for advancement.						Promotions & opportunities for advancement are given and provided based on equitable practices and reviewing organizational needs, individual’s performance, and goals.	
c.	Racial diversity is an explicit goal for hiring.						Racial diversity and equity are explicit goals for hiring. There is a process to assess if personal filters are being used in hiring – such as how one defines a “good” candidate.	
d.	Racial diversity is an explicit goal in contracting with vendors.						Racial diversity & equity are explicit goals in contracting with vendors. Due diligence is checked on vendors’ commitment & actions to advance racial equity.	
e.	Hiring Committees are supported on how to implement a process to reflect the organization’s diversity and/or inclusion values – from job announcement to hiring.						Hiring Committees are supported on implementing a process reflecting the organization’s commitment to racial equity – from creating racial equity-related job requirements through orientation.	

Please provide any comments and/or examples about your ratings:

13. Focus on the Organization’s Decision-Making Process

	Statement A	<u>Statement A</u> describes the organization WELL 1	<u>Statement A</u> SOMEWHAT describes the organization 2		<u>Statement B</u> SOMEWHAT describes the organization 3	<u>Statement B</u> describes the organization WELL 4	Statement B	Don’t Know
a.	Formal leaders make decisions with limited or no input from people most impacted and communicate the decisions as needed.						Formal leaders engage people directly impacted by a decision as part of the decision-making process & then communicate the decision. If this process is not used, the reason is explained.	
b.	Decisions that are adopted are usually made in the “meeting before the meeting” or the meeting after the formal meeting.						Decisions that are adopted are pretty much the same as the ones developed during the meeting and if not, the rationale is communicated to everyone involved.	
c.	Those in formal leadership positions sometimes advocate for exceptions to a policy, and typically the change or exception will be made.						Policies are applied consistently, equitably, and transparently.	
d.	People with the most direct life experience and/or who are most impacted by the decision sometimes provide input.						People with the most direct life experience and/or who are most impacted by a decision are included in the decision-making process. Their input is prioritized and/or they are involved in reviewing a proposed decision prior to being final.	
e.	The people in the communities the organization serves are considered recipients of our work.						People in the communities the organization works in are considered stakeholders, and lead and shape the work.	
f.	Leaders prioritize their accountability to the Board and/or foundations and donors.						Leaders prioritize their accountability to the people most impacted by their decision and/or the communities the organization works in.	

	Statement A	Statement A describes the organization WELL 1	Statement A SOMEWHAT describes the organization 2		Statement B SOMEWHAT describes the organization 3	Statement B describes the organization WELL 4	Statement B	Don't Know
g.	The organization adheres to its hierarchy in communication and decision-making processes.						The organization's decision-making process is known. There is an expectation of cross-positional communication, accessible leadership, and ensuring that the people most impacted provide guidance and leadership in decisions.	
h.	Power to make decisions and communicate them is generally done by a select few with positional power in the organization. Decisions are typically shared on an as-needed basis.						Power to make decisions is distributed based on positional role and responsibility, bounded by trust, communicated transparently, and reinforced through established accountability practices.	

Please provide any comments and/or examples about your ratings:

14. Focus on how the Organization Distributes Information and Resources

	Statement A	<u>Statement A</u> describes the organization WELL 1	<u>Statement A</u> SOMEWHAT describes the organization 2		<u>Statement B</u> SOMEWHAT describes the organization 3	<u>Statement B</u> describes the organization WELL 4	Statement B	Don't Know
a.	Information is held by a select group of people, who decide whether, how and when it will be shared with others.						Efforts are made to ensure information is shared consistently & transparently throughout the organization in a timely manner.	
b.	People in formal leadership positions may ask for feedback from staff, though there is not always follow-up or accountability in how the feedback informs and/or is used						People in power listen to the feedback of staff and either act on the feedback or explain why they do not.	
c.	Organizational budgets are shared on a need-to-know basis and there is limited awareness of how resources are distributed.						Organizational budgets are shared with staff, with opportunities for discussion and dialogue on how resources are being prioritized.	
d.	The budget does not include sufficient resources to implement the organization's diversity, inclusion, and/or equity goals.						The budget includes sufficient resources to implement the organization's racial equity goals.	
e.	Resources for staff (e.g. professional development; work tools, staffing) are not distributed equitably.						Resources for staff (e.g. professional development, work tools, staffing) are distributed equitably and transparently.	
f.	The creation of and decisions about the budget are typically made based on seniority, funder priorities, and/or outcomes that can be reported to external audiences						Racial equity impact questions ⁶ are used by the organization & people most impacted co-create the budget.	

Please provide any comments and/or examples about your ratings:

⁶ Keleher, Terry. [Racial Equity Impact Assessment](#). Race Forward (New York, NY: 2009).

15. Focus on how the Organization provides Compensation and Benefits⁷

	Statement A	<u>Statement A</u> describes the organization WELL 1	<u>Statement A</u> SOMEWHAT describes the organization 2		<u>Statement B</u> SOMEWHAT describes the organization 3	<u>Statement B</u> describes the organization WELL 4	Statement B	Don't Know
a.	Salaries for new employees are set based on their earning history or stated needs.						Salaries for new employees are set according to a set of racially equitable guidelines.	
b.	Salaries are not included in job announcements.						Salaries are included in job announcements.	
c.	Salaries are determined based on the market and centered on ensuring the organization is getting the most amount of work for the least amount of financial investment.						The organization values employees & works with staff to create a salary & benefit package that is equitable, adaptable to current situations, & transparent. Also, some positions and/or individuals receive support for their workload's emotional burden.	
d.	The organization's benefits reflect traditional family values and follow a holiday schedule that is not inclusive of different cultures, faiths, traditions, or identities.						The organization's benefit package is created equitably with staff & reflects needs expressed to support their employment. The organization's definitions of family & holidays are inclusive of different cultures, faiths, traditions, and identities.	
e.	Salaries are determined by job tasks and positions within the organization.						Salaries are assessed through racially equitable guidelines with consideration of the emotional burden of workload, e.g., participating in the organization's racial equity team.	

Please provide any comments and/or examples about your ratings:

⁷ Mutual adaptation with Trina Jackson, TSNE MissionWorks.

16. Focus on the Organization’s Process to Measure Progress

	Statement A	<u>Statement A</u> describes the organization WELL 1	<u>Statement A</u> SOMEWHAT describes the organization 2		<u>Statement B</u> SOMEWHAT describes the organization 3	<u>Statement B</u> describes the organization WELL 4	Statement B	Don’t Know
a.	The organization’s assumption is that if you did not meet goals, you did not work hard enough.						When goals are not met, individual and systemic assessments are made & the response ensures resources & supports to reach goals are provided equitably, and/or goals are modified, if warranted.	
b.	Mistakes are considered a problem – particularly for the individual who makes them.						The organization assumes that mistakes & failure are part of the work & an opportunity for the individual & the organization to learn & make changes, innovate & experiment and also to be accountable. For mistakes with life & death or significant community consequences, the organization prioritizes checks & balances & implements transparent individual and organizational accountability measures to eliminate mistakes.	
c.	The organization sometimes marginalizes individuals for mistakes, rather than assessing the organization’s policies, practices, and culture.						The organization works with the people involved in the mistake to assess & provide supports, to take responsibility for mistakes & to make amends.	
d.	Only numbers and hard data are prioritized in assessing progress.						Progress is assessed through different types of data and anecdotal information and is informed and determined by people most impacted.	
e.	People in formal leadership positions primarily define what progress and success looks like.						A diverse group (identity and positional power) define what progress and success look like. The opinions of people most impacted are prioritized.	

	Statement A	Statement A describes the organization WELL 1	Statement A SOMEWHAT describes the organization 2		Statement B SOMEWHAT describes the organization 3	Statement B describes the organization WELL 4	Statement B	Don't Know
f.	There is an implicit/explicit message to work hard to achieve the mission even if it requires working beyond the normal work schedule and/or on vacation or sick days.						Management works to create a culture and practices that support individual and collective wellbeing e.g., physical, emotional, and spiritual health, and may change deadlines to that end.	

Please provide any comments and/or examples about your ratings:

17. Focus on the Organization’s Racial Equity Practices

	Statement A	<u>Statement A</u> describes the organization WELL 1	<u>Statement A</u> SOMEWHAT describes the organization 2		<u>Statement B</u> SOMEWHAT describes the organization 3	<u>Statement B</u> describes the organization WELL 4	Statement B	Don’t Know
a.	Time is typically a major barrier to working toward diversity, inclusion and/or equity outcomes.						Racial equity work is prioritized to ensure it is integrated in every facet of the organization.	
b.	When addressing situations involving race and racism, the organization views intent as more important than impact.						When addressing situations involving race and racism, the organization views impact as more important than intent.	
c.	Diversity and inclusion goals are a part of performance evaluations for most staff.						Racial equity goals are part of the strategic plan and each staff’s performance evaluation.	
d.	A group is designated to manage the diversity, equity, and inclusion (DEI) work in the organization. This group is limited in their power and resources to ensure DEI goals are met.						A Racial Equity working group, in relationship with formal leadership, has the resources & power including an accountability process created for the organization to reach racial equity goals.	
e.	Human Resources policies focused on diversity, inclusion, and equity are not consistently practiced. Typically, there are few or no consequences for not following them.						Human Resources policies focus on racial equity and have accountability practices embedded. There are consequences & support to ensure one’s actions are held accountable to each policy.	
f.	The organization primarily evaluates success in moving toward diversity, inclusion, and equity goals by internal benchmarks.						The organization evaluates success in moving toward racial equity goals by its contributions, the impact of its actions, and through feedback from the people most impacted.	

	Statement A	Statement A describes the organization WELL 1	Statement A SOMEWHAT describes the organization 2		Statement B SOMEWHAT describes the organization 3	Statement B describes the organization WELL 4	Statement B	Don't Know
g.	In external communications, the organization includes mention of diversity, equity, and inclusion in its materials.						In external communications, the organization discusses its racial equity commitment and connection with its mission and work. Information is shared to educate stakeholders and to be accountable in operationalizing racial justice.	

Please provide any comments and/or examples about your ratings:

SECTION 5: Reflecting on Racial Equity Change Process - Individual and Organization

18.	What are three words/short phrases you would use to describe your organization’s culture?	
19.	How, if at all, has the organizational conversation on race, racism, white privilege, and/or white dominant culture evolved/deepened over the past few years? Share any barriers to having the conversation and/or deepening it.	
20.	How have organizational policies and practices, especially those that currently have racial inequities embedded in them, impacted your role and responsibilities in the organization? What are your ideas for changes, including things the organization may need to be let go of?	
21.	What are the characteristics of leadership that are most affirmed within the organization (e.g. messages, who gets promoted)? What are the characteristics of leadership that are <u>not</u> embraced, and/or <u>not</u> considered effective?	
22.	Who is the organization accountable to regarding your racial equity change process? What is an example of an accountability process the organization has in place in the context of racial equity change process, if any? Is there an accountability practice you would recommend?	

23.	<p>What are the organization's current strengths and skills which will be helpful in creating a racially equitable organization and culture? What are your strengths and skills you bring to helping create a racially equitable organization and culture?</p>	
24.	<p>What are the organization's challenges and/or barriers to creating a racially equitable organization? What ideas and/or types of supports are needed to address these challenges/barriers?</p>	
25.	<p>As you reflect on your role within the organization, what are examples of how you have worked to address racial inequities and/or white dominant culture? What have been the barriers to progress?</p>	
26.	<p>As you reflect on your role within the organization, what types of supports would assist you in addressing racial inequities and/or white dominant culture? What work are you ready to do now?</p>	

If you have questions and/or feedback about *Transforming Organizational Culture Assessment Tool*, please email Maggie Potapchuk, mpotapchuk@mpassociates.us, www.mpassociates.us