



Commission on Improving the Status of Children in Indiana

Equity in Action Resource Packet

The Equity in Action Resource Packet is designed to provide organizations with specific tools that can be used to help inform their efforts to prioritize and advance equity, inclusion and diversity in their daily operations.

Included in this packet are three specific resources: (1) a list of recommended organizational equity protective factors; (2) an example of a Chief Equity Officer job description; and (3) a list of organizational readiness assessment tools. The Recommendations for Organizational Equity Protective Factors seeks to identify key areas and practices for agencies to consider, that will better prepare them to create and maintain a culture that fosters, promotes and centers equity. Many agencies now understand and see the need to designate a person(s) to help lead, coordinate, and focus the organization's equity, inclusion and diversity efforts. The Chief Equity Officer Job Description highlights a non-exhaustive list of skills and qualifications that this person(s) should possess, along with key responsibilities and duties. Designating a person or group to lead this shift in culture will be fruitless if the organization as a whole is not ready and willing to lean in and do the hard work. The Organizational Readiness Assessment Tools and Resources provide concrete steps that can be taken and resources that can be used by organizations to determine their level of readiness and commitment to begin and sustain meaningful and impactful equity work.

These tools are examples and can serve as a starting point for agencies seeking to move from talk to action in the areas of equity, inclusion and diversity.



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Recommendations for Organizational Equity Protective Factors (Framework)

Governance:

- Have demographic and professional diversity in those comprising the governance structure of the organization
- Provide annual education and/or training on equity for members of governance
- Adopt an equity vision and mission statement to purport the values, beliefs and practices of the organization regarding equity
- Create and adopt equity goals and SMART objectives that is reflected in the strategic plan and operational plans of the organization
- Adopt a budget that has financial support that extends beyond the salaries of staff but includes professional development, travel, planning, events and activities, etc. needed to promote equity within the organization.
- Have at least 1 measurable indicator for executive leadership to demonstrate in their annual performance evaluation

General:

- Institute an equity team and not a person to better integrate equity in the culture of the organization.
- Institute an equity campaign to promote organizational transformation.
- Review and employ strategies to recruit and retain diversity throughout the organization reflecting constituents served.
- Adopt a mandate to include an equity indicator on ALL employee performance evaluations.
- Have the equity officer report directly to the President/CEO or Executive Director of the agency.



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Sample Equity Statements

Adopted from the NIRSA: Leaders in Collegiate Recreation (<https://nirsa.net/nirsa/strategic-values/#equity-diversity-inclusion>)

Equity statement

NIRSA Our organization celebrates equity, diversity, and inclusiveness. We embrace these pillars of excellence as crucial to healthy people and healthy communities.

Value Statements

NIRSA Believes that:

- Its core values are strengthened when all members have [a] voice and are encouraged to contribute.
- Every member of humanity has a contribution to make to the whole. It is our duty to encourage and promote that contribution.
- Equity, diversity, and inclusion are an active process that requires continuous commitment to promote healthy people, healthy communities, and the overall success of present and future generations.

Action Statements

Our values are realized through or by:

- Fostering a culture of open-mindedness, compassion, and inclusiveness among individuals and groups.
- Actively building a community whose members have diverse cultures, backgrounds, and life experiences.
- Providing effective leadership in the development, coordination, implementation, and assessment of a comprehensive array of programs and services to promote diversity and understanding of differences.
- Creating and maintaining opportunities for engagement, education, and discourse related to issues of equity, diversity, and inclusion.
- Identifying competencies that are essential to creating environments enriched with diverse views and people.
- Providing educational opportunities toward the development of socially responsible leaders who are willing to engage in the discourse and decision-making that can lead to a transformational change toward learning, achievement, healthy people, and healthy communities.



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- Honoring freedom of expression, ideals of citizenry, and civility of discourse as fundamental to personal, professional, and organizational growth.
- Challenging and dismantling systemic oppression.
- Establishing and maintaining the Equity, Diversity, and Inclusion Commission to promote social justice and diversity in all Association activities; address issues related, but not limited to, race, ethnicity, culture, age, gender, sexual orientation, gender identity, ability, national origin, veteran status, social-economic class, religion, and professional status; and coordinate educational resources and opportunities for its' members.
- Reaching beyond the Association to establish beneficial relationships with individual and institutional partners who share mutual goals and interests.



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Example Chief Equity Officer Job Description

Department: Administration/Executive

Reports To: President, CEO or Director of the Agency

Summary:

The Chief Equity and Inclusion Officer is an executive leadership role, reporting directly to the CEO or Agency Head. The Chief Equity and Inclusion Officer serves as a member of Executive Leadership Team, partnering with other senior leaders to develop and drive forward the key strategies of the agency. The Chief Equity Officer leads the agency's commitment and strategy to be a diverse, anti-racist, equitable, and inclusive organization. Primary responsibilities include compliance, advocacy and education. This position is responsible for setting and implementing an overarching vision of diversity, equity, and inclusion (DEI) for the agency—both at the programmatic and administrative levels—that works to eliminate systemic organizational marginalization and promotes inclusion and anti-racist practices that will be evidenced through our structures, customs and leadership. This position requires an inspiring, collaborative, courageous, innovative, and visionary leader with outstanding people and management skills. This position also serves as a referral person to outside agencies in the areas of Equal Employment Opportunities and Affirmative Action.

Essential Duties and Responsibilities:

A Visionary and Strategist

The Chief Equity and Inclusion Officer defines the overarching vision, identity, and strategy to become a diverse, equitable, and inclusive agency both in our Administration and across our networks and programs: This includes:

- Defining – rooted in research, best practice, and community voice – an equity identity and lens, and what our vision of success is for applying them to all that we do
- Partnering with other leaders to define the agency's vision and engage in strategic planning work.
- Ensuring that short and long-term plans are fully reflective of and inspired by an equity lens, and reflect our equity identity
- Collaborating with the agency's Data and Analytics teams to develop and monitor Key Performance Indicators, and analyze and share observations regarding programmatic



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practice and innovation, internal and external DEI metrics, and organizational culture and practice

- Monitoring progress toward our DEI vision and achievement of our DEI goals as well as the execution of strategies that map toward those goals
- Partnering with the Continuous Quality Improvement team to ensure continuous learning and quality improvement regarding KPI's, DEI metrics, and organizational culture and practice.
- Collaborating with experts to evaluate the agency's practices, stay current on DEI research and best practices in the homelessness, health, housing, and employment fields and beyond. Additionally, recommend relevant adaptation of agency activities and actions in accordance with that learning.

A Skilled Leader and Manager

- The Chief Equity and Inclusion Officer directly manages the Equity Team, but also works closely with all programmatic teams, as well as many administrative teams, to ensure that organizational culture, practice and leadership development programming are anchored in our vision for equity and inclusion. To this end, the Chief Equity and Inclusion Officer:
 - Supervises professional/support staff. Hires, evaluates, trains, disciplines and recommends dismissal of staff as necessary.
 - Provides strategic leadership in the development of culturally specific and culturally responsive policy and service delivery models, as well as creating standardized guidelines and criteria for culturally responsive and culturally specific programming
 - Develops, implements, and reports on the organizational equity plan in partnership with organizational stakeholders.
 - Ensures alignment among different service lines to support the unique needs and opportunities of culturally specific populations
 - Works closely with Human Resources to design and implement strategies for recruiting and retaining leaders of color to senior leadership positions
 - Collaborates with the Professional and Training Development division to develop leadership development curriculum and educational opportunities, to providing career advancement pathways for communities of color and LGBTQ+ staff
 - Examines and gathers agency data, policies, procedures and practices and identify what needs to evolve, be changed, or initiated.



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Gifted Communicator and Diplomat

The Chief Equity and Inclusion Officer shapes the agency's equity strategy and guides our efforts; supports our efforts to improve, and they also hold us accountable when we fail. This work requires superb communication skills, both written and verbal, and strong diplomacy skills. The Chief Equity and Inclusion Officer is a strong listener and able to build network partnerships across the organization and community in order to achieve DEI goals. More specifically, s/he/they need to:

- Develop consistent communication and feedback mechanisms to ensure we can identify, discuss, and address equity issues impacting internal and external stakeholders.
- Provide technical assistance to Organization Leadership and other identified agency work groups regarding cross-cultural communications and collaborations.
- Stay abreast of research and best practices in equity and inclusion and infuse/adapt it to agency culture and practice.
- Develop communication systems to share best practices, highlight bright spots, and keep staff apprised of key initiatives and activities.
- Partner with Senior Leaders to communicate our commitment, our practices, our accomplishments and our learnings more broadly.
- Partner with Public Policy Director to respond to events that impact communities, develop public policy priorities and strategies.
- Lead the agency's Diversity Committee and working groups, ensuring staff, client, and resident voice is integrated into equity strategy and practice
- Oversee consciousness-raising efforts, including affinity groups, monthly DEI newsletter, and regular workshops/presentations/seminars/celebrations regarding our diverse community
- Manage and strengthen the agency's relationships and collaborations with external partners to deliver training and support to achieve our plan.
- Lead strategic engagement with the agency's Board of Directors, including but not restricted to monthly written Board Updates, collaboration on Equity strategic identity and roadmap, and Board DEI Sub-committee, if needed.

SKILLS AND ABILITIES:

1. Ability to engage with diverse staff and leadership to promote trust, collaboration, and partnership between departments and levels of leadership.
2. Exceptional leadership skills
3. Demonstrated track record in challenging and influencing peers to approach all work with an equity lens



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4. Ability to develop and monitor indicators of organizational culture and engage employees and senior leadership to create organizational change.
5. Strong background of managing change throughout a distributed system of entities and teams
6. Deep content knowledge of the diversity, equity, and inclusiveness research base and best practices for organizations striving to become more diverse, equitable, and inclusive
7. Strong interpersonal skills; able to quickly establish credibility to develop and manage productive relationships with internal and external individuals and agencies.
8. Strong management expertise; able to manage multiple projects and to move quickly from one to another.
9. Ability to create/design adult learning and teaching of the content and skills associated with operating with an equity lens
10. Proven track record of success engaging with communities of color and LGBTQ+ communities
11. Ability to remain solution-focused and respectful in all interactions with staff, co-workers, vendors, and clients.
12. Sufficient manual dexterity and physical ability to perform assigned tasks
13. Ability to manage time and meet deadlines
14. Ability to maintain accurate records and necessary paperwork
15. Ability to provide support and training to other staff

MINIMUM QUALIFICATIONS:

1. Requires a minimum of a BA/BS in social work, psychology, business, education or related field. Master's Degree preferred.
2. Minimum 10 years' experience advocating for and implementing change within a multi-cultural environment.
3. Minimum 3 years' experience developing and implementing diversity/equity/inclusion programs.
4. Direct service, nonprofit experience preferred.
5. Excellent public speaking, facilitation, organizational, and analytical skills
6. Ability to communicate in languages other than English preferred.
7. Demonstrated understanding of cultural values and norms of various communities, particularly of communities of color, LGBTQ+ and Recovery communities.
8. Understanding of culturally specific resources available within the community.
9. Effective intercultural communication skills and ability to advocate/address issues of diversity.



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10. Sensitivity and understanding of specific barriers which may lead to lack of access and engagement.
11. Experience supervising and leading teams.
12. Experience developing and implementing trainings.
13. If a recovering chemically dependent person, must currently be clean and sober.
14. Must pass a pre-employment drug screen, TB test, and background check.
15. Ability to effectively interact with co-workers and clients with diverse racial and ethnic backgrounds, religious views, cultural backgrounds, immigrant status, physical and mental abilities, generational differences, gender identity and sexual orientation, and to treat everyone with respect and dignity.

Citation:

- 1) <https://nhchc.org/wp-content/uploads/2019/08/ccc-chief-equity-officer.pdf>
- 2) <https://www.pcc.edu/hr/employment/management-jobs/officeofequityandinclusiondirector/>
- 3) <https://jobs.smartrecruiters.com/Amara1/743999708903130-director-of-diversity-equity-and-inclusion>



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Organizational Readiness Assessment Tools and Resources

Organizations can evolve to become anti-racist, inclusive, and diverse. The first step to creating this environment is to address the culture and commitment of the organization. The transformation begins with developing a comprehensive understanding of how exclusive practices and oppression operate within an organization's own walls. From that analysis comes a commitment and concrete plans for developing equity, inclusion, and diversity within the organization and in the larger society. Here are some tools to assist with assessing organizational readiness.

Demonstrate LGBTQ Access Organizational Assessment: This tool was designed to assist human service organizations in evaluating their current performance in serving LGBTQ people. The self-assessment is an examination of organizational policy and practice, based on ten key areas of operation. While the tool is extensive, it is not intended to be comprehensive. This is a starting point for those interested in building capacity to increase LGBTQ access within a broader commitment to social justice. <https://endgv.org/wp-content/uploads/2016/04/Organizational-Self-Assessment.pdf>

Advancing the Mission: Tools for Equity, Diversion, and Inclusion: Annie E. Casey Foundation Describes some of the concrete steps taken by the Annie E. Casey Foundation to approach matters of race and ethnicity within their own organization and provides tools that can be adapted for your own organization, including an institutional assessment quiz to benchmark your organization. <https://www.racialequitytools.org/resourcefiles/caseyann.pdf>

Western States Center developed a Dismantling Racism project that includes an organizational assessment and some helpful materials. We have summarized and provided links to a number of them below.

For Organizations Striving to Become Multi-Cultural and Anti-Racist Organizations

Anti-Racist Organizational Development~ The goals of the rubric exercise are to give you the time to begin to analyze your organization in terms of the organizational anti-racist vision. This is an evaluation tool. [https://www.nijn.org/uploads/digital-library/org%20assessment%20western%20states%20\(1\).pdf](https://www.nijn.org/uploads/digital-library/org%20assessment%20western%20states%20(1).pdf)

Moving A Racial Justice Agenda Organizational Assessment: Are You Ready?

Assessing Your Organization's Readiness and Capacity to Move a Racial Justice Agenda~ Not every organization is ready to take on racial justice work even if they are eager to do so. The following assessment is designed to raise critical issues as organizations and



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organizers think about their capacity to move a racial justice agenda. This assessment is designed to identify potential barriers to taking on a racial justice focus and outline the preparatory work that may be needed to effectively engage in and sustain racial justice work. <https://www.racialequitytools.org/resourcefiles/westernstates3.pdf>

Brief Organizational Assessment Tool: This brief racial justice assessment tool is in the form of a checklist to help your organization pinpoint your progress toward racial justice work and problem areas.

[https://www.njjn.org/uploads/digitallibrary/AssessingOurOrganizations_RacialJustice%20\(1\)%20\(1\).pdf](https://www.njjn.org/uploads/digitallibrary/AssessingOurOrganizations_RacialJustice%20(1)%20(1).pdf)

Concentric Circles: Unpacking Privilege and Power Maggie Potapchuk, MP Associates detailed a racial justice questionnaire including an individual assessment, organizational assessment, accountability with constituents, and reflection. <https://www.njjn.org/uploads/digital-library/potapchukm.pdf>