

# Justice Equity Diversity and Inclusion

**Organizational Action Toolkit**

**DEVELOPED BY**

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## EXECUTIVE SUMMARY

Many of the societal problems that nonprofit organizations focus on — health disparities, poverty, housing, and quality education — have a deep-rooted origin in systemic and structural racism. Nonprofits have a responsibility, and often a passionate commitment, to fight racism and be exemplary models of racial equity and justice. Yet, there is a significant diversity and inclusion gap in the nonprofit sector. Over the last 20 years, studies have shown that people of color hold only 20% of nonprofit leadership positions (CEP, 2020; Thomas-Breitfeld & Kunreuther, 2017; Battalia Winston, 2015). Studies have also found that diversity among leadership and staff fosters creativity, innovation and high-quality decision-making (Phillips & Neale, 2001; Buse et al. 2016; Gauthier et al, 2019). Therefore, organizations that prioritize justice, equity, diversity and inclusion are more equipped to effectively serve their communities.

Assessing and taking steps toward organizational JEDI can be an uncomfortable and challenging commitment for any nonprofit. For smaller nonprofit organizations, addressing organizational JEDI can be even more overwhelming due to limited staff and board capacity. However, no matter the size, institutionalizing JEDI is vital to every nonprofit organization's structure.

This toolkit serves as an encouraging first step for any organization ready to implement JEDI practices. Using this toolkit, board and staff members can assess their current practices and find resources to ensure their continued growth in diversity and equity. Lastly, JEDI work is an iterative journey, which a committed organization must regularly and frequently revisit. This toolkit facilitates evaluating the current state, measuring progress and revisiting justice, equity, diversity and inclusion work regularly.

## DEFINITIONS:

**Justice:** the process and result of addressing and ending institutional, structural and systemic oppression; the laws, policies and practices necessary to achieve and sustain equity.

**Equity:** the active assurance that everyone is afforded the opportunities essential to attaining their highest level of health.

**Diversity:** variation and difference across the sectors of age, race, gender, culture, ethnicity, background, geography, class, ability, beliefs and beyond.

**Inclusion:** how diversity is leveraged to transform the status quo to ensure equitable, healthy and high-performing organizations and communities where all individuals feel valued and engaged.

Discover more definitions and deeper discussions of terms: ([https://www.ywboston.org/wp-content/uploads/2016/02/MISS\\_VIT\\_BLD-SUPP-FOR-MISS\\_TRN-AND-DEVEL\\_SJ-GLOSSARY\\_MARCH\\_2016.pdf](https://www.ywboston.org/wp-content/uploads/2016/02/MISS_VIT_BLD-SUPP-FOR-MISS_TRN-AND-DEVEL_SJ-GLOSSARY_MARCH_2016.pdf)).

## OBJECTIVE

The goal of this interactive toolkit is to stimulate and guide smaller nonprofit organizations as they integrate JEDI best practices into their governance and organizational structure.

### The toolkit will:

- guide board and staff members in exploring their current racial diversity, equity, and inclusion practices;
- assess JEDI imbalance in five key organizational areas of focus; and
- connect board and staff members to resources and tools on how to make improvements within those five organizational areas.

## TARGET AUDIENCE:

This toolkit will be useful for nonprofit organizations with a volunteer board of directors and fewer than three full-time staff. These organizations are generally community-based with limited resources and minimal staff support. Yet, such organizations provide essential services in vulnerable communities and have the potential to be the vanguard of social justice work. To be change agents, nonprofits must be equipped with JEDI tools and resources to ensure that equity and justice is a reality within their own organization.

## WHY FOCUS ON RACIAL EQUITY?

Racism is a fundamental challenge to public health, and structural racism is a foundational cause of economic and health inequities. We acknowledge that there are many populations and communities which experience injustice and inequity— such as LGBTQIA+ communities, people with disabilities, elders, etc. In this toolkit, we focus on racial equity because racism overlays other factors of discrimination; whatever discriminations a community experiences, racism adds another burden of inequity. In addition, history has shown that where we have managed to dismantle one piece of the systemic racism structure, another gets built to perpetuate the systems of racial privilege and oppression. Therefore, in this crisis, we must become actively and aggressively anti-racist. We need to become anti-racist organizations (<https://www.coloradopublichealth.org/anti-racist-organization>). We hope this toolkit helps your organization do that.

## THEORY OF CHANGE:

- 1 **IF** a small nonprofit governance board implements the JEDI toolkit that operationalizes racial equity and inclusivity within its organizational structure **THEN** the organization will be better equipped to promote racial equity and justice within the communities they serve.

## HOW TO EFFECTIVELY UTILIZE THIS TOOLKIT

Before beginning your assessment, we invite you to reflect on what you hope to achieve through engaging with this toolkit and keep that in mind as you go through it. Other things to consider are what community means for your organization and who makes up the community that your organization serves. For example, if you are a state public health association, then your “community” is likely to be the public health workforce, not the general public. Being clear about who makes up your community at the start will help your organization accurately assess JEDI using definitions specific to your organization and the community it serves. Once identified, please reference your organization’s definition of community and its identity as you progress through this toolkit.

This toolkit includes five assessments that focus on governance, mission-driven programs, partnerships, communication and advocacy. Each assessment allows you to reflect on your organizational practices and identify areas for improvements. A list of tools and resources for you to utilize when making such amendments follows each assessment.

There may be several ways to do the assessments included in this toolkit. One way that seems to work well is to convert the assessments to an online survey and send that to your board and possibly key stakeholders. Once you have the responses, the board can look at the results to prioritize next steps. Recognizing that JEDI work is a journey, we encourage you not to try to do everything the assessment suggests that needs to be addressed. We suggest looking closely at three aspects of the assessment results:

- 1 On which assessment statements did most of the respondents check “strongly agree” or “agree”? These are strengths that you can both celebrate and use as foundations for building your next steps.
- 2 On which assessment statements did most of the respondents check “strongly disagree” or “disagree”? These may be where you need to start your next steps.
- 3 On which assessment statements did you see several respondents checked agreement and a similar number checked disagreement? These may be areas in which you are not communicating effectively on what you are doing.

Once you have discussed your assessment results, decide where you want to focus, explore the resources related to your focus, and construct an action plan to move your work forward over the next year or two. Make sure the plan is concrete and short-term. There will always be more work to do; the toolkit can help guide your next steps.

Before diving into the toolkit, your organization must understand the historical context and importance of organizational JEDI work. As an introduction, we encourage you to watch the video How to Address Equity, Diversity, and Inclusion Issues in a Contemporary Workplace (<https://www.youtube.com/watch?v=0ECHLI0hkec>).

When facilitating authentic discussions about racism and equity, it is important to use proper terminology to avoid conflicts or misunderstandings. We encourage you to review the following resources to reference throughout your JEDI work:

- Our Shared Language: Social Justice Glossary ([https://www.ywboston.org/wp-content/uploads/2016/02/MISS\\_VIT\\_BLD-SUPP-FOR-MISS\\_TRN-AND-DEVEL\\_SJ-GLOSSARY\\_MARCH\\_2016.pdf](https://www.ywboston.org/wp-content/uploads/2016/02/MISS_VIT_BLD-SUPP-FOR-MISS_TRN-AND-DEVEL_SJ-GLOSSARY_MARCH_2016.pdf))
- About the Racial Equity Tools Glossary (<http://archive.racialequitytools.org/glossary>)
- Key Equity Terms & Concepts: A Glossary for Shared Understanding (<https://cssp.org/wp-content/uploads/2019/09/Key-Equity-Terms-and-Concepts-vol1.pdf>)

After you use the toolkit to plan your next steps, we ask that you complete the brief evaluation survey included in the toolkit (<https://forms.gle/8cDVvV31bUcZmSRcA>). Your input will help us improve the toolkit and find ways to offer resources focused on the areas small nonprofit organizations need the most.

As your organization begins JEDI work, please remember:

- 1 This toolkit can be adjusted to fit your organizational needs. Each section can be worked on independently, simultaneously, or sequentially depending on your organizational capacity to implement these practices.
- 2 The toolkit focuses on racial equity, but you can use it to assess justice, equity, diversity and inclusion for other oppressed identities and communities.
- 3 JEDI work requires time, dedication and intention. This work should not be a one-time commitment for your organization but rather an ever-evolving, long-term journey.

A note about the tools and resources: Hundreds of resources can be accessed over the web. We have tried to winnow these down to a manageable number for guiding you. If you find others particularly helpful, we welcome hearing about those; just include them when you fill out the evaluation survey.

*We wish you the best as your organization takes this first step toward racial equity!*

## GOVERNANCE

The governance assessment evaluates current governance practices and policies such as board recruitment, training, bylaws and decisionmaking. Complete this assessment by checking the box that's most relevant to each statement.

Statement	Strongly Agree	Agree	Disagree	Strongly Disagree
Our board reflects the diversity of the community that we aim to serve.				
We have an intentional and deliberate strategy/process for recruiting board members from communities of color.				
The qualifications for potential board members encourage a diverse pool of candidates to consider serving on our board.				
Our board and staff members participate in periodic training about reducing racial disparities and promoting racial equity both internally and externally.				
We provide our board and staff members with ongoing training to ensure a deep level of understanding about racial inequities in communities we serve				
Our bylaws include explicit language that demonstrates the organization's commitment to inclusive practices; including but not limited to statement of values, required ratio of diverse board members and mission statement.				
Our board members intentionally and deliberately bring the perspectives, feedback, needs and priorities of diverse communities into strategic boardroom discussions.				

## **TOOLS FOR JEDI-BALANCED GOVERNANCE**

- 1** Why Are We Still Struggling with Diversity, Equity, and Inclusion in Nonprofit Governance? (<https://nonprofitquarterly.org/why-are-we-still-struggling-with-diversity-equity-and-inclusion-in-nonprofit-governance/>)
- 2** Diversity, Equity, and Inclusion Work: Eight Questions for Building Readiness and Steering Clear of Pitfalls (<http://www.mayenoconsulting.com/wordpress/diversity-equity-and-inclusion-work-eight-questions-for-building-readiness-and-steering-clear-of-pitfalls/>)
- 3** Race Matters: Organizational Self-Assessment (<https://www.aecf.org/resources/race-matters-organizational-self-assessment/>)
- 4** Racial Equity Action Plans: A How-to Manual (<https://www.racialequityalliance.org/resources/racial-equity-action-plans-manual/>)
- 5** Role of Boards in realizing organizational performance from inclusive diversity (<https://www.youtube.com/watch?v=owaLO6Da4mQ>)
- 6** Diversity, Equity, and Inclusion in Nonprofit Bylaws (<https://nonprofitlawblog.com/diversity-equity-and-inclusion-in-nonprofit-bylaws/>)

## MISSION-DRIVEN PROGRAMS

The mission-driven programs assessment evaluates how aligned your current mission statement and programming are with your justice, equity, diversity and inclusion goals. Complete this assessment by checking the box that's most relevant to each statement.

Your organization's mission statement:

Statement	Strongly Agree	Agree	Disagree	Strongly Disagree
Our mission, vision and goals intentionally and explicitly address and embrace justice, equity, diversity and inclusion as defined above.				
Our programs reflect the organization's mission.				
Our work dismantles systemic, structural, institutional racism.				
Our programming is accessible to all community members. When planning programs, we consider accessibility and possible barriers to participation (e.g., transportation, disability, stigma, scheduling, childcare, etc.).				
We develop ongoing bidirectional relationships with the community to ensure their active involvement in the work of our organization and our organization's active involvement in the work of the community (e.g., intentional and consistent communication channels, bidirectional training, shared resources and decisionmaking).				
We actively engage community members in developing, planning, implementing and evaluating programs.				
We evaluate how our programs contribute to our organizational justice, equity, diversity and inclusion goals.				
We use evaluation data for continuous program improvement as needed.				

## **TOOLS FOR JEDI-BALANCED MISSION-DRIVEN PROGRAMS**

- 1** The Importance of Aligning Vision, Mission, and Strategy in Fast-Changing Healthcare Environments ([https://www.whartonhealthcare.org/the\\_importance\\_of\\_aligning\\_vision\\_mission\\_and\\_strategy\\_in\\_fast\\_changing\\_healthcare\\_environments](https://www.whartonhealthcare.org/the_importance_of_aligning_vision_mission_and_strategy_in_fast_changing_healthcare_environments))
- 2** Racial Equity Toolkit: An Opportunity to Operationalize Equity (<https://www.racialequityalliance.org/resources/racial-equity-toolkit-opportunity-operationalize-equity/>)
- 3** Beyond Diversity (pages 18-23) ([https://www.diversegreen.org/wp-content/uploads/2017/05/BeyondDiversity\\_Report.05.24.2017.pdf](https://www.diversegreen.org/wp-content/uploads/2017/05/BeyondDiversity_Report.05.24.2017.pdf))
- 4** A Public Health Framework for Reducing Health Inequities (<http://barhii.org/framework/>)
- 5** Advancing The Mission: Tools for Equity, Diversity, and Inclusion (<https://www.aecf.org/resources/advancing-the-mission-tools-for-equity-diversity-and-inclusion/>)
- 6** Nonprofit Association of Oregon’s Equity Statement (<https://nonprofitoregon.org/sites/default/files/uploads/file/NAO-Equity-Statement.pdf>)
- 7** Steps We Took To Create The Americans For The Arts Statement On Cultural Equity (<https://www.americansforthearts.org/about-americans-for-the-arts/cultural-equity/steps-we-took-to-create-the-americans-for-the-arts-statement-on-cultural-equity>)
- 8** Health Equity Resource Toolkit for State Practitioners Addressing Obesity Disparities (<https://www.cdc.gov/nccdphp/dnpao/health-equity/state-health-equity-toolkit/pdf/toolkit.pdf>)

## PARTNERSHIPS

The partnership assessment evaluates current partnerships and strategic alliances with other organizations and funders. Complete this assessment by checking the box that's most relevant to each statement.

Statement	Strongly Agree	Agree	Disagree	Strongly Disagree
We intentionally form partnerships with other community organizations that align with our organization's justice, equity, diversity and inclusion goals				
We form strategic alliances with local and national institutions and organizations to mobilize, amplify and make connections that work to promote our organization's justice, equity, diversity and inclusion goals.				
Funding requirements from external funders align with our organization's justice, equity, diversity and inclusion goals.				
Our external partnerships and funders provide us with funding/ resources that promote racial equity.				

## TOOLS FOR JEDI-BALANCED PARTNERSHIPS

- 1 Leading by Example: Diversity Equity and Inclusion in Community Foundations: Changing Practice and Policy (pages 30 - 50) (<https://pfc.ca/wp-content/uploads/2022/01/californiatomorrow.pdf>)
- 2 Strategic Alliances (<https://www.minnesotanonprofits.org/resources-tools/principles-practices-for-nonprofit-excellence/strategic-alliances>)
- 3 What does it mean? (<http://www.thepowerofpossibility.org/resources/strategic-alliances-restructuring-mean/>)
- 4 Partnerships and Collaboration (<https://www.bridgespan.org/insights/library/nonprofit-management-tools-and-trends/strategic-alliances>)
- 5 Tools and Templates (<https://www.sustainedcollab.org/for-nonprofits/>)
- 6 Tools and Resources (<https://www.councilofnonprofits.org/tools-resources>)
- 7 6 Tips for Streamlined Nonprofit Relationship Management (<https://4degrees.ai/blog/non-profits/6-tips-for-streamlined-nonprofit-relationship-management/>)
- 8 Strategic partnerships (<https://www.imd.org/research-knowledge/articles/strategic-partnerships/>)
- 9 Strategic Alliances: Cooperation between competitors for strategic purposes (<https://corporatefinanceinstitute.com/resources/knowledge/strategy/strategic-alliances/>)

## COMMUNICATION

The communication assessment evaluates current communication policies and practices to ensure inclusive internal and external communication materials. Complete this assessment by checking the box that's most relevant to each statement.

Statement	Strongly Agree	Agree	Disagree	Strongly Disagree
We have an organizational policy for board transparency and communication with stakeholders (e.g., all board documents are transparent and accessible to the community we serve).				
We publicize our commitment to promoting racial equity through various communication platforms (e.g., website, social media, newsletters).				
We ensure the accessibility of all communication materials on all platforms including but not limited to print, social media and websites.				
We review the literacy level of all written materials to ensure accessibility by our community.				
We provide materials in the languages most accessible to those in our community.				
We screen all internal and external communication materials for racist, insensitive and biased language.				

## TOOLS FOR JEDI-BALANCED COMMUNICATION

- 1 Content creators, here's an Equity Screen to use as you work on your next blog post, book, podcast, or video (<https://nonprofitaf.com/2019/08/content-creators-heres-an-equity-screen-to-use-as-you-work-on-your-next-blog-post-book-podcast-or-video/>)
- 2 Equity and Inclusion Lens Guide (page 18) (<https://nonprofitoregon.org/sites/default/files/NAO-Equity-Lens-Guide-2019.pdf>)

## ADVOCACY

The advocacy assessment evaluates the organizational capacity to work for or against a particular cause or policy through a variety of activities including community organizing, education, litigation and work with administrative agencies. Complete this assessment by checking the box that's most relevant to each statement.

Statement	Strongly Agree	Agree	Disagree	Strongly Disagree
Our staff and board members identify policies and practices within our communities that perpetuate inequities and health disparities.				
Our board has voted on the 501(h) election of the IRS Code which provides guidance and protection for our advocacy work.				
We periodically educate our staff and board members on the differences between advocacy and lobbying.				
We become strategically involved in initiatives that reduce inequities and disparities within our community (e.g., coalition-building, campaigning, educational initiatives, etc.).				
We engage community members in prioritizing, developing and implementing advocacy initiatives that address inequities.				
<b>We publicly support local/national initiatives and movements that fight for racial equity.</b>				
<b>We continuously identify innovative ways to contribute to local justice organizing efforts.</b>				

## TOOLS FOR JEDI-BALANCED ADVOCACY

- 1 Race Equity and Inclusion Action Guide ([https://www.aecf.org/m/resourcedoc/AECF\\_EmbacingEquity7Steps-2014.pdf](https://www.aecf.org/m/resourcedoc/AECF_EmbacingEquity7Steps-2014.pdf))

- 2 Equity and Inclusion Lens Guide (pages 15 and 19) (<https://nonprofitoregon.org/sites/default/files/NAO-Equity-Lens-Guide-2019.pdf>) Advocacy vs. Lobbying (<https://www.councilofnonprofits.org/advocacy-vs-lobbying>)
- 3 Tools and Strategies for Effective Advocacy (<https://healthyfuturega.org/get-involved/learn/tools-strategies-for-effective-advocacy/>)
- 4 Advocacy Tool Kit (<https://groundedsolutions.org/tools-for-success/resource-library/advocacy-tool-kit>)
- 5 Frequently Asked Questions Advocacy Capacity Tools (<https://bolderadvocacy.org/resource-library/tools-for-effective-advocacy/evaluating-advocacy/advocacy-capacity-tool-act/frequently-asked-questions-act/>)

## CONCLUSION:

Congratulations on starting (or continuing) your organizational journey towards racial equity. You play a critical role in advancing equity and justice in your community by prioritizing racial equity within your organization. As nonprofit leaders, we all must fulfill our part in dismantling systems of oppression. Then we can begin the reconciliation and healing process to build an equitable society. We hope this tool continues to support and guide you throughout your organization's racial equity journey.

Please complete a brief evaluation survey which will help us better serve small nonprofit organizations like yours: [https://bit.ly/APHA\\_JEDI](https://bit.ly/APHA_JEDI)

*“Injustice anywhere is a threat to justice everywhere. We are caught in an inescapable network of mutuality, tied in a single garment of destiny. Whatever affects one directly, affects all indirectly.”*

— Martin Luther King Jr., Letter from the Birmingham Jail

*“Not everything that is faced can be changed, but nothing can be changed until it is faced.”*

— James Baldwin

## References:

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