



EQUITY SELF-ASSESSMENT

**tool for organizations and collectives
committed to advancing equity
through structural change**

This resource has been developed by ADHOC Assembly with support from the shared leadership within PACT's ALL IN initiative, adapted from open source tools provided by Stage Left Productions and Calgary Coalition for Equity and Diversity in the Arts (CCEDA).

We encourage the pursuit of resources readily available on the world wide web in support of your ongoing work.

COMPLETING THE SELF-ASSESSMENT

Depending on your organizational culture, you may choose to complete this with executive, board and/or staff for a range of perspectives. The results are for internal use, and you will not be expected to disclose them in an open forum. Details of your self-assessment should help you to set a baseline from which to move into action, and to identify areas where action is most critical. This data will focus discussion with those you hope to engage in your initiative.

AFTER IT'S COMPLETE

- Identify opportunities for immediate action within the scope of your current authority and resources
- Raise internal capacity to advance equity through discussion or exercises with your team
- Consider the resources you are able and willing to commit to further action.
- Identify areas in which you feel compelled to action, but require guidance or support
- Consult a colleague when you are ready to move into a significant, supported action that will change your organization.
- Engage appropriate consultant or facilitator to support conception and implementation of your organization's action plan.
- Complete case study on your action and outcomes.

PREPARING FOR ACTION TOWARD INSTITUTIONAL CHANGE

Prior to moving into significant action be prepared to answer the following questions:

- What do you know about your action and what do you not know?
- In what area of your organization do you intend to initiate action? (eg. onstage, governance, executive, creative leadership, other)
- In a best case scenario, what outcome do you anticipate?
- What experience, expertise or perspective is needed to supplement your team's skills?
- Do you anticipate resistance from any of your team?
- Are there members of your community who may perceive your action as a threat?
- What aspect of this action is most exciting to you, personally?
- What are your financial and time-based parameters?
- Are you ready?

1. Organizational Profile

These questions enable you to assess the organization's management of diversity & equity in the workplace.

THE MANAGEMENT OF DIVERSITY & EQUITY IN THE ORGANIZATION		
Diversity Assessment	Response	Comments / Next Steps
1. Is diversity included in the: <ul style="list-style-type: none"> • Values • Mission Statement • Vision Statement • Strategic Plan • Other important areas 	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure	
2. Do diversity goals exist? Has the organization established goals around increasing diversity? Are there timelines attached to deliverables? What aspect of your work do these goals impact?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure <input type="checkbox"/> Admin <input type="checkbox"/> Art <input type="checkbox"/> Governance <input type="checkbox"/> Other	
3. Is responsibility for each diversity goal assigned to specific staff? If so... Do they have the authority and influence needed to reach each goal? Do they have the necessary cultural knowledge, capacity and/or authority?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure	

THE MANAGEMENT OF EQUITY IN THE ORGANIZATION		
Equity Assessment	Response	Comments / Next Steps
<p>4. Are specific staff in place to address equity concerns in the workplace?</p> <p>Do they have the authority to uphold human rights in the workplace?</p> <p>Are they from equity-seeking communities?</p>	<p><input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure</p>	
<p>5. Does your organization engage outside consultants to achieve equity goals?</p> <p>Do your consultants have relationships with equity-seeking communities?</p> <p>Are you willing to make changes based on consultant recommendations?</p>	<p><input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure</p>	
<p>6. Does your organization partner with equity-seeking organizations to achieve mutually beneficial goals?</p> <p>If so, does your organization cede leadership on these projects to partner organizations?</p> <p>Do you have protocol for establishing equitable leadership structures around these partnerships?</p> <p>Do you have protocols for resolving conflict within partnerships?</p>	<p><input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Sometimes</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Sometimes</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure</p>	

2. Protected Classes Profile

These questions relate to the organization's human resources ("labour force"), with a specific view toward human rights in the workplace and how they are upheld and honoured within your office / artistic structures and systems.

THE REPRESENTATION OF PROTECTED CLASSES OF PEOPLE IN THE ORGANIZATION'S WORK							
Protected Class	Board of Directors	Committee	Senior Staff (AD/GM)	Support Staff	Artistic	Production	Audience
1. Indigenous Peoples In what roles, specifically?							
2. People of Colour In what roles, specifically?							
3. Women In what roles, specifically?							
4. Transgender People In what roles, specifically?							
5. People on the LGBTTIQ spectrum In what roles, specifically?							
6. People who live with impairment(s) In what roles, specifically?							
7. Other(s)? In what roles, specifically?							

Procedures Assessment	Response	Comments/Next Steps
3. Are all staff (including visiting artists) made aware of their workplace rights & responsibilities: How?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure	
4. Have members of the leadership team undergone professional development, specific to the enforcement of human rights in the workplace?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure	
5. Does the organization have a process in place to deal with concerns related to human rights in the workplace?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure	
6. Does the organization have a specific set of qualifications for the staff who manage such concerns?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure	
7. Is the process of reporting a human rights concern easy to initiate?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure	
8. Are concerns treated seriously, confidentially and in a timely manner?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure	
9. Are staff aware of the protocol for reporting human rights concern where senior staff are involved?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure	
10. Is the process of reporting a human rights concern safe to initiate without reprisal?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure	

Human Resources Assessment	Response	Comments/Next Steps
11. Do you recruit candidates from outside of the organization's immediate networks?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure	
12. Do you encourage applicants from equity-seeking communities to apply to your organization?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure	
13. Do you actively recruit applicants from equity-seeking communities to apply to your organization?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure	
14. Do you seek recommendations for culturally appropriate ways of auditioning and engaging members of communities with whom you do not regularly engage?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure	
15. Do you provide the following workplace accommodations? <ul style="list-style-type: none"> • Time off for (non-Christian) religious or spiritual holidays • Flexible scheduling for parental considerations • Smudging • Gender neutral bathroom(s) • Workplace accessibility for staff who live with impairment(s) • Affinity spaces • Others 	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure	

16. Do you have specific strategies to cultivate a workplace that removes barriers for all staff?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure	
17. Do you conduct upwards evaluations?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure	
18. Do you conduct exit interviews?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure	
19. When you engage cross-culturally, do you invite collaborating artists/ community members to evaluate their engagement with your organization?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure	

4. Programming & Patrons Profile

These questions enable you to assess the organization's relationships with its broader communities / constituents.

THE MANAGEMENT OF INCLUSION IN YOUR ORGANIZATION'S PROGRAMMING		
Programming Assessment	Response (approximate)	Comments / Next Steps
1. What percentage of your <i>artistic programming</i> is <i>reflective of</i> audiences from equity-seeking communities?	<input type="checkbox"/> 25 <input type="checkbox"/> 50 <input type="checkbox"/> 75 <input type="checkbox"/> 100	
2. What percentage of your <i>artistic programming</i> is <i>engaged with</i> artists from equity-seeking communities? In what roles are they engaged?	<input type="checkbox"/> 25 <input type="checkbox"/> 50 <input type="checkbox"/> 75 <input type="checkbox"/> 100	
3. What percentage of your <i>outreach and educational programming</i> is <i>reflective of</i> audiences from equity-seeking communities?	<input type="checkbox"/> 25 <input type="checkbox"/> 50 <input type="checkbox"/> 75 <input type="checkbox"/> 100	
4. What percentage of your <i>outreach and educational programming</i> is <i>engaged with</i> artists from equity-seeking communities? In what roles are they engaged?	<input type="checkbox"/> 25 <input type="checkbox"/> 50 <input type="checkbox"/> 75 <input type="checkbox"/> 100	
5. How do you assess your inclusion efforts? By increased numbers of participants By impact on programming By soliciting feedback from those we've included on the quality of the engagement? Others?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure	