**Assessment of the Board’s Culture of Inclusion**

**Introduction**

Organizations throughout the country are working diligently to bring diverse voices to their boards to reflect the demographics, experiences and perspectives of the communities they serve, and to strengthen their capacity as a responsive service agency in their community. These organizations invest significant time and resources on board recruitment. While some succeed in attracting board members who bring racial, ethnic, cultural, gender identity, age, education and socio-economic diversity, among others, many struggle to retain them. Success in recruiting and retaining members of the board require that board recruitment, orientation, education and inclusion practices support all members, regardless of their background and personal circumstances, in feeling valued, valuable and authentically engaged. This assessment is designed to support your board in examining how your board recruitment and retention practices may be improved, so that your board can successfully recruit, welcome and engage board members with a wide diversity of experiences, as they become productive and deeply committed leaders of the organization. Some practices may require time and resources to prepare for their adoption. Please consider this an assessment, as well as a planning tool.

**Directions**

Please read the statements listed below and indicate how you feel your board’s values, practices and procedures align with each statement, using the following assessment scale:

0 = We have not started

1 = Some initial work has been done

2 = Significant progress has been achieved

3 = Fully integrated into our practices

N/A = Not Applicable

? = Don’t know

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| **Inclusive Practices**  | **Assessment** | **Comments** |
| **Recruitment, Cultivation, Welcome and Orientation**  |  |  |
| Our organization has strong collaborative relationships with people and leaders with a wide range of life experiences  |  |  |
| Our board members are constantly deepening their knowledge of the communities we serve and building relationships with leaders of those communities  |  |  |
| Our Board development plan includes strategies, goals and tasks for achieving board diversity, and we monitor and measure our progress  |  |  |
| Our Board recruitment criteria includes board member attributes, qualities and characteristics needed to build a diverse board  |  |  |
| We have an effective process in place to identify and consult with people in the community who can help us find and build relationships with diverse board candidates that meet our recruitment criteria  |  |  |
| We seek people who bring diverse perspectives and experiences reflected in the communities we serve, not one person to “represent” an entire community |  |  |

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| **Inclusive Practices**  | **Assessment** | **Comments** |
| **Recruitment, Cultivation, Welcome and Orientation, Cont.**  |  |  |
| In communicating our board recruitment criteria and priorities to our community, we state our commitment to inclusion and actively invite diverse leaders to consider board service  |  |  |
| Our board appreciates that meaningful cultivation of board candidates is based on building relationships and that it requires time  |  |  |
| We find ways to actively engage candidates with the organization and the board before we invite them to serve on the board, including opportunities for social interaction  |  |  |
| We ask candidates to share their story, describe their interests, and indicate how they would feel most helpful and engaged in their board service  |  |  |
| Our Board’s term limits are neither too short nor too long to best take advantage of new diverse talent  |  |  |
| We have a process in place to effectively orient and involve new board members as soon as they are elected  |  |  |
| We encourage all board members to select committees and other work groups according to their self-identified interests, experiences and skills  |  |  |
| Every board member personally ensures that new members feel welcome  |  |  |
| We assign a learning partner (peer mentor) to every board member during their first year of service  |  |  |
| **BOARD PROCESS**  |  |  |
| We support all board members in building and exercising their leadership capacity |  |  |
| We constantly look for opportunities for all our board members to learn together about the community, about our organization and its mission, and about each other  |  |  |
| A board member (e.g., Board Chair, Governance Committee member or mentor) contacts members with frequent or unexplained absences to identify possible barriers to their participation and ensure that everyone is fully engaged and committed to board service  |  |  |
| Our Board process is not treated as fixed. New Board members are welcome to recommend changes to make our process more accessible  |  |  |
| When deliberating on issues or making decisions, we take time to listen to each other’s ideas and carefully weigh all options and perspectives. Our process allows and encourages all voices to be heard and questions to be asked |  |  |
| At Board and committee meetings, we provide interpretation in languages other than English, if needed  |  |  |
| At Board and committee meetings, we ensure that members are encouraged and able speak in their preferred language  |  |  |

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| **Inclusive Practices**  | **Assessment** | **Comments** |
| **Board Process, Continued** |  |  |
| At Board and committee meetings, we provide materials in a language other than English, if needed |  |  |
| At Board and committee meetings, we use language that is community-friendly and in lay-people’s terms, avoiding unexplained “expert” language  |  |  |
| At Board and committee meetings, we provide materials in community-friendly language  |  |  |
| Our meeting schedules (starting time and length) consider the needs of all board members, particularly those with job and childcare restrictions  |  |  |
| We meet in centrally-located places that are easily accessible for board members with transportation challenges  |  |  |
| We meet in places physically accessible for all board members  |  |  |
| When hosting events, attending conferences, etc., we make sure that cost is not a barrier for board members who may wish to attend  |  |  |
| Although all board members contribute to the financial sustainability of the organization according to their circumstances, each board member’s personal financial contribution is confidential.  |  |  |

**Please complete this assessment and forward it to \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ by \_\_\_\_\_\_\_\_\_\_\_ (date). Individual assessments will be compiled into a confidential summary.**

**Thank you for your commitment to building an inclusive and equitable organization and community!**