DEIJ in Action:

Appendix

**Prepared for
the Chesapeake Bay Watershed Community**

May 2019

Sponsored by:

CBTRUST
Chesapeake Bay Trust

CHESAPEAKE BAY
FUNDERS NETWORK

ChooseCleanWater
COALITION

Developed by:

Skeo

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Appendix 1. Project Timeline, Tasks and Stakeholder Engagement

Phase (Timeline)	Tasks	Stakeholder Engagement
Design DEI Assessment Framework Spring 2017 – Summer 2017	• Conduct best practices research • Draft a Diversity, Equity and Inclusion framework to guide development of the DEI Readiness Survey • Finalize the DEI Framework based on project team and CCWC workshop feedback	*2017 Choose Clean Water Conference Session*: Facilitate discussion of the draft framework

Design and conduct DEI Training Workshops for CBFN and CCWC Fall 2017 – Winter 2017	• Design a DEI Training workshop that includes modules on:
	   o What is DEI and why do we need it?
	   o Building relationships based in Cultural Humility
	   o DEI transformations in watershed work
	   o DEI transformations in philanthropy
	   o Looking ahead to the DEI Strategy
	• Facilitate the workshop for both CBFN and CCWC.
		2017 CBFN Annual Retreat: Facilitate DEI Training session and Readiness Assessment Roundtable with CBFN members.
		
		2017 CCWC Annual Meeting: Facilitate a DEI Training session and Readiness Assessment Roundtable with CCWC members.

Conduct DEI Readiness Assessment Fall 2017 – Summer 2018	• Design and facilitate a DEI Readiness Assessment roundtable with representatives of Environmental Justice/underserved/marginalized communities. • Design the DEI Readiness Assessment Survey based on the DEI Framework and the feedback from three roundtable dialogues. • Administer the DEI Readiness Assessment Survey online. • Develop a draft and final DEI Readiness Assessment Summary memo to capture results and inform the DEI Plan.	*2017 Expanding the Circle Roundtable*: Facilitate a Readiness Assessment Roundtable with representatives of EJ/underserved/marginalized communities. 2018 Choose Clean Water Conference session: Present preliminary survey results.
Draft and Final DEI Plan Fall 2018-Spring 2019	• Develop a draft DEI Plan outline. • Develop a final DEI Plan outline based on input from the project team and stakeholders • Develop a draft and final DEI Plan.	*CCWC DEI Advisory Committee:* Gathered feedback on draft DEI Plan outline through email review.

Appendix 2. DEI Readiness Assessment Survey

Introduction:
Please take a few minutes to think about and respond to the survey questions. The survey should take 10-20 minutes to complete. Your responses will help inform the development of the Diversity, Equity and Inclusion Plan by identifying areas of strength and surfacing challenges that exist in ongoing efforts to incorporate diversity, equity and inclusion (DEI) into grantmaking, programmatic and organizational development work.

For the purposes of this survey, please consider the following definitions as you respond:
- *Diverse/Diversity* – The demographic mix of a specific collection of people, taking into account elements of human difference. (e.g., racial and ethnic groups, income, spectrum of built environment settings (rural to urban), faith communities, LGBTQ+ populations, people with disabilities, gender, relationship to the natural environment)

- *Equity* – Improving equity is to promote justice, impartiality and fairness within the procedures, processes, and distribution of resources by institutions or systems. Tackling equity issues requires an understanding of the underlying or root causes of disparities within our society.

- *Inclusion* – Refers to the degree to which diverse individuals are able to participate fully in the decision-making processes within an organization or group. While a truly "inclusive" group is necessarily diverse, a "diverse" group may or may not be "inclusive."

- *Underserved* – Populations who receive inadequate or inequitable services, who experience quality-of-life disparities, and who may in some circumstances have little power or influence over outside decisions that impact their daily quality-of-life.

Finally, to help focus your responses:
- If your organization works on a variety of issues in addition to the environment, please take this survey from the perspective of the whole organization unless a question is focused specifically on environmental programming.

- If your organization has a larger fiscal sponsor or participates in a network, please respond on behalf of your organization alone.

- If you are a government/school, please select Community Based Organization on question #2.

Opening questions

1. Name of Organization (free response)

2. Organization type

    ☐   Funder

    ☐   Non-governmental organization

    ☐   Community-based organization

Note in nonprofit oriented survey:

(NOTE: If you are funder, you will be directed to exit this survey. Please return to the email and click the funder-oriented survey link to complete the funder-oriented survey.)

Note in funder oriented survey:

(NOTE: If you are an NGO or a CBO, you will be directed to exit this survey. Please return to the email and click the nonprofit-oriented survey link to complete the nonprofit-oriented survey.)

3. Are you a Choose Clean Water Coalition member? (yes/no)

Part I. Advancing Diversity, Equity and Inclusion (DEI) in our Environmental Work
DEI in Environmental Work

4. As you consider your organization's environmental work, to what extent do you personally agree with the following statements:

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Don't know
It is important that all communities are represented in environmental work.						
DEI practices are important for increasing the number of people and constituencies advocating for environmental issues, securing environmental funding and/or making funding decisions.						
DEI practices are important for increasing the diversity of people and constituencies advocating for environmental issues, securing environmental funding and/or making funding decisions.						
DEI practices are important for strengthening our ability to advocate effectively for improving the environment.						
DEI practices can result in an improved environment in the communities in which you work.						
DEI practices can result in improved quality-of-life in the communities in which you work.						

Organizational Capacity for Engagement with Underserved Communities

5. As you consider your organization's capacity for engagement with diverse, and/or underserved communities, to what extent do you agree with the following statements?

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Don't know
Funders						
Our organization has implemented strategies to reduce the barriers in the grantmaking process for organizations that serve diverse and/or underserved communities.						
Our organization funds projects that expand DEI awareness and practices within grantee organizations.						
Our organization funds projects that promote collaboration among our grantees and diverse and/or underserved communities.						
Our organization funds projects that align environmental investments with community needs.						
Our organization directly funds organizations serving diverse and/or underserved communities.						
Our organization directly funds organizations led by people of color.						
Our organization directly funds social and/or environmental justice work.						
Our organization directly funds projects that include relationship building, environmental health and/or community quality-of-life improvements in diverse and/or underserved communities.						
DEI is an explicit criterion in our organization's funding prioritization process.						
Our organization prioritizes applicants who fully integrate DEI practices in their organizational model.						
NGOs						
Our organization is working proactively to increase our capacity to work effectively with diverse and/or underserved communities.						
Our organization builds collaborative relationships with community-based organizations and leaders from diverse and/or underserved communities.						
Our organization is able to align our environmental projects and programs with broader community interests and needs that can benefit diverse and/or underserved communities.						
Our organization provides adequate tools and trainings that help increase the effectiveness of						

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Don't know
staff and volunteers who are working in diverse and/or underserved communities.						
Our organization has developed effective, culturally appropriate outreach strategies and/or materials to support outreach in diverse and underserved communities.						
Our organization has the tools and expertise needed to connect with non-English speaking communities.						

6. Please indicate the level of representation of the following groups in environmental work your organization supports.

	Well represented	Somewhat well represented	Neutral	Under-represented	Not represented	Not relevant in our watershed or region
Low income communities						
Communities of color						
Urban communities						
Rural communities						
Public health community						
Faith communities						
Non-environmental, community-based organizations						
Social justice organizations (e.g., ACLU, NAACP)						
Local government staff						
Family farmers						
Migrant farmworkers						
Watermen						
Subsistence fishers						
Recreational users						
Hunters / anglers						
Other?						

7. As it relates to our environmental work, our organization needs to overcome the following challenges to feel more confident in funding or partnering with diverse and/or underserved communities:

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Don't know
Funders						
Perceived disconnect with our mission.						
Perceived lack of connection to our environmental goals.						
Uncertainty over how engaging diverse and underserved communities can improve environmental outcomes.						
Lack of board support.						
Uncertainty over who to reach out to in the community.						
Lack of culturally appropriate materials to share with the community (e.g., materials in languages other than English)						
Lack of applications from diverse and underserved communities.						
Organizations applying do not meet eligibility criteria.						
Organizations applying lack capacity to manage an award (e.g., internal controls, legal requirements, reporting).						
NGOs						
Perceived disconnect with our mission.						
Perceived lack of connection to our environmental goals.						
Uncertainty over how engaging diverse and/or underserved communities can improve environmental outcomes.						
Lack of board support.						
Overworked or lack of time, funding or organizational support.						
Uncertainty over reaching out to groups and/or communities that may be unfamiliar to us.						
Uncertainty about who to reach out to in the community.						
Social tensions between groups are strained right now.						
Anger or distrust between our organization and diverse and/or underserved community.						
Lack of culturally appropriate materials to share with the community (e.g., materials in languages other than English)						
Technological barriers to communication (e.g., lack of resources to go door-to-door, connectivity, disconnect between preferred methods of communication)						

Funding DEI
For Funders only:
8. As you consider your proposal review process, how strongly would you agree with the following statements?

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Don't know
Our organization has a robust outreach plan for disseminating and soliciting proposals and application materials to a wide and diverse audience.						
Our organization has a strategy and plan in place for assisting lower-capacity organizations through our proposal review process.						
Our organization prioritizes proposals that are directly led by diverse and/or underserved communities.						
Our organization prioritizes proposals that integrate DEI practices, relationship building, environmental health and/or community quality-of-life considerations throughout the work and/or organization.						
Our proposal review process explicitly assesses the cultural competency of the applicant organization.						
Our proposal review process explicitly assesses the applicant's submission through an equity lens.						
Our organization has effective criteria for tracking grantee progress on DEI efforts over time.						

For NGOs only:
8. As you consider your organization's funding and support needs, what priority would you place on the following? (number from 1-3 in order of priority)
   - Funding for organizational/internal DEI (e.g., DEI awareness and skills building)
   - Funding to support relationship building and authentic community engagement in diverse and underserved communities
   - Funding to directly invest in diverse and underserved communities (e.g., compensation for local leaders, direct investments in quality-of-life or environmental health improvements)

Perceptions of Network/Coalition DEI Performance
9. When you consider the Chesapeake Bay Funders Network, from your perspective to what extent do you agree with the following statements?

CBFN Mission Statement: Network members share a vision of a restored and resilient Chesapeake Bay that is sustained by healthy, equitable and vibrant communities and natural resources in the region.

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Don't know
CBFN values Diversity, Equity and Inclusion.						
It is important for CBFN to reflect the diversity of the Chesapeake Bay Watershed region in order to achieve the network's mission.						
CBFN includes a range of foundation types that represent a diverse range of issues.						
Foundation representatives at CBFN meetings reflect the diversity of the Chesapeake Bay Watershed region.						
CBFN should continue to invest resources in strengthening DEI practices.						

9. When you consider the Choose Clean Water Coalition, from your perspective to what extent do you agree with the following statements?

CCWC Vision Statement: Creating a unified movement committed to ensuring clean water is returned to the rivers and streams that flow into a healthy Chesapeake Bay.

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Don't know
It is important for CCWC and its members to reflect the diversity of the Chesapeake Bay Watershed region in order to achieve the coalition's vision.						
CCWC values Diversity, Equity and Inclusion.						
CCWC is taking concrete steps to support its members in strengthening DEI in the Chesapeake Bay Watershed.						
CCWC should continue to invest resources in strengthening DEI practices.						

Free Response
10. Is there anything else you'd like to share about diversity, equity and inclusion within your organization's work? (e.g., a question, ideas about specific tools or resources that would be useful, an area you think your organization does particularly well or poorly in)

Part II. Advancing DEI within our Organizations

Organizational Culture
11. Advancing diversity, equity and inclusion in our organization could:

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Don't know
Strengthen the ability to advance our mission						

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Don't know
Enable us to better reflect and serve diverse populations through our work						
Improve the quality of work life						
Improve hiring and retention of diverse staff						
Broaden our base for advocacy						
Broaden our opportunities for fundraising						

12. Indicate the extent to which you agree with the following statements:

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Don't know
Our organization is welcoming and inclusive for staff and volunteers from diverse backgrounds and perspectives.						
Staff and volunteers have a mechanism/process to raise questions about the way DEI challenges and opportunities impact our organization's work.						
Staff and volunteers believe their feedback will be implemented or acted upon.						

Organizational Commitment
13. Indicate the extent to which you agree with the following statements:

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Don't know
Our organization values Diversity, Equity and Inclusion.						
Our organization has a clearly articulated mission and/or vision that integrates Diversity, Equity and Inclusion.						
Our organization has a clearly articulated policy and/or goals related to Diversity, Equity and Inclusion.						
Our organization's day-to-day priorities and programs reflect DEI goals.						
Our organization has an effective monitoring and improvement process for meeting our DEI goals.						

Leadership and Management
14. Our organization's board reflects our region's diversity in:

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Don't know
Age						
Gender						

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Don't know
Race/ethnicity						
Gender identity/Sexual orientation						
Educational attainment						
Socioeconomic status						

15. As you consider your organization's board, indicate the extent to which you agree with the following statements:

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Don't know
Our board believes DEI is integral for achieving our organization's mission.						
Our board often or regularly discusses DEI challenges and opportunities freely.						
Our board feels our organization is performing well in DEI and that the board therefore doesn't need to focus on DEI challenges and opportunities.						
Our board actively identifies strategies to advance DEI.						

16. Our organization's senior management reflects our region's diversity in:

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Don't know
Age						
Gender						
Race/ethnicity						
Gender identity/Sexual orientation						
Educational attainment						
Socioeconomic status						

17. As you consider your organization's senior management, indicate the extent to which you agree with the following statements:

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Don't know
Our senior management believes DEI is integral for achieving our organization's mission.						
Our senior management often or regularly discusses DEI challenges and opportunities ~~freely~~.						
Our senior management feels our organization doesn't need to focus on DEI challenges and opportunities because our organization is performing well in this area.						

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Don't know
Our board actively identifies strategies to advance DEI.						

Workforce and Volunteers

18. Our organization's staff, volunteers and/or contractors reflect our region's diversity in:

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Don't know
Age						
Gender						
Race/ethnicity						
Gender identity/Sexual orientation						
Educational attainment						
Socioeconomic status						

19. As you consider the staff, volunteers and/or contractors who serve as the face of your organization, indicate the extent to which you agree with the following statements:

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Don't know
Our organization is effective at recruiting qualified staff, volunteers and/or contractors from diverse backgrounds.						
Our organization is effective at supporting and retaining staff and/or volunteers from diverse backgrounds.						
Our organization is effective at promoting staff from diverse backgrounds within the organization.						
Our organization provides staff, volunteers and/or contractors with appropriate training opportunities to improve their skills in DEI.						

Free Response

20. Is there anything else you'd like to share about diversity, equity and inclusion within your organization? (e.g., a question, relevant organizational history or structures that impact DEI, ideas about specific tools or resources that would be useful, an area you think your organization does particularly well or poorly in)

Respondent Information

21. My organization serves communities in the following states in the Chesapeake Bay Watershed region (check all that apply):

☐ Delaware

☐ District of Columbia

☐ Maryland

☐ New York

☐ Pennsylvania

☐ Virginia

☐ West Virginia

22. My organization supports/implements programs that directly address the following: check all that apply.

☐ Environmental protection and conservation

☐ Water Quality (drinking)

☐ Water Quality (Stormwater, Waste Water, Ag pollution)

☐ Environmental Justice (policy, advocacy, organizing)

☐ Animals (rights, conservation, rescue, etc)

☐ Public Health (prevention, research, patient support, advocacy, etc)

☐ Community Development (housing, neighborhood, economic, workforce development etc.)

☐ Education (policy, programs, reform, etc)

☐ Human and Civil Rights

☐ Human/Social Services (food banks, youth development, family services, etc)

☐ Arts, Culture and Humanities (libraries, museum, performing arts, etc)

☐ Food justice, access, and/or system reform

☐ Other (please describe)

23. To the best of your ability, how many people are employed by your organization (full time or part time)?

24. To the best of your ability, how many of those individuals are people of color?

25. To the best of your ability, select all funders from whom your organization receives or has received funding? (NOTE: Question 25 in the non-funders survey; not present in the funders survey. Therefore, the numbering differs between the two surveys from this point forward.)

☐ I don't know

☐ [list of funders]

26. I would identify my affiliation with my organization as (check one):

☐ Staff

☐ Senior Management

☐ Board

☐ Donor

☐ Volunteer

☐ Contractor

27. What communities do you serve? (Check all that apply.)

☐ Urban

☐ Suburban

☐ Rural

28. I would identify my race/ethnicity as: (check all that apply)

☐ White or Caucasian

☐ Black or African American

☐ American Indian or Alaska Native

☐ Native Hawaiian or Other Pacific Islander

☐ Asian

☐ North African or Middle Eastern

☐ Hispanic or Latinx

☐ Multi-racial, Mixed Race, or Biracial

☐ Prefer not to say

29. I would identify my role(s) as (check all that apply):

☐ Administrative

☐ Policy/litigation/legislative advocacy

- ☐ Restoration/Project Management

- ☐ Program Officer

- ☐ Communications/Community outreach

- ☐ Education and training

- ☐ Fundraising/membership

- ☐ Scientific research/data analysis

- ☐ Management team/supervisor

- ☐ Public engagement/ community organizer

30. What is your age?

- ☐ 18-24 years old
- ☐ 25-34 years old
- ☐ 35-44 years old
- ☐ 45-54 years old
- ☐ 55-64 years old
- ☐ 65-74 years old
- ☐ 75 years or older

31. I would identify my gender identity as: (Check all that apply)

- ☐ Transgender
- ☐ Genderqueer
- ☐ Bi-Gender / Third Gender / Two Spirit
- ☐ Female
- ☐ Male

- ☐ Prefer to self-describe

- ☐ Prefer not to say

32. How would you describe your identity as it relates to economic status?

- ☐ Low-income

- ☐ Working Class

- ☐ Lower-Middle Class

- ☐ Middle Class

- ☐ Upper-Middle Class

- ☐ Upper Class

- ☐ Prefer not to say

33. Do you consider yourself a member of the Lesbian, Gay, Bisexual, Transgender and/or Queer (LGBTQ+) community?

☐ Yes

☐ No

☐ Prefer not to say

Appendix 3. DEI Readiness Assessment Findings Presentation

FINAL SURVEY RESULTS FOR THE
2018 DIVERSITY, EQUITY AND INCLUSION SURVEY
JULY 2018

Survey sponsored by: Chesapeake Bay Trust,
Chesapeake Bay Funders Network, and Choose
Clean Water Coalition

Survey results analyzed by: Skeo

OVERVIEW

- **DEI Survey Overview**
- **Non-Funders Results and Key Themes** (slides in green)
  - Advancing DEI in our Environmental Work
  - Advancing DEI within our Organizations
- **Funders Results and Key Themes** (slides in blue)
  - Advancing DEI in our Environmental Work
  - Advancing DEI within our Organizations

2018 DEI SURVEY OVERVIEW

A Partnership of the Chesapeake bay Trust, Chesapeake Bay Funders Network and Choose Clean Water Coalition

OVERVIEW

- Surveys are part of an effort to develop a Diversity, Equity and Inclusion Plan for the Chesapeake Bay community.
- The project is a partnership between the Chesapeake bay Trust, Chesapeake Bay Funders Network and Choose Clean Water Coalition.
- Two surveys were conducted to reach:
  - Funders (members and partners of CBFN)
  - Non-funders (members of CCWC and grantees of CBFN funders)
- The surveys included approximately 30 questions in the following areas:
  - Advancing DEI in our Environmental Work
  - Advancing DEI within our Organizations
  - Organizational and Respondent Information

IMPORTANT CAVEATS

- Survey respondents were not required to answer every question.
- Results that follow represent the percent of respondents for a particular question.
- The non-funders survey includes respondents who are:
  - Choose Clean Water Coalition members
  - grantees of Chesapeake Bay Funders Network funders
- The funders survey includes respondents who are members of the Chesapeake Bay Funders Network

NON-FUNDERS
RESPONDENTS

Non-funder Survey Respondents

	Number or Percent of Respondents
RESPONDENTS AND ORGANIZATIONS	
Number of respondents	199
Number of organizations[1]	122
RACE AND ETHNICITY[2] (Q28)	
Respondents who identify with a white racial or ethnic background	83%
Respondents who identify with racial or ethnic backgrounds of color	17%
Prefer not to say	3%
ROLE IN THE ORGANIZATION (Q26)	
Board	22%
Senior Management	41%
Staff	33%
Donor	0%
Volunteer	3%
Contractor	1%

[1] Note that some respondents chose not to indicate the name of their organization. Additionally, responses from different chapters of the same organization were counted as distinct organizations
[2] Note that this question allowed respondents to check all racial/ethnic identities that apply or "prefer not to say;" therefore, percentages may not add up to 100%

NON-FUNDERS
ADVANCING DEI IN OUR ENVIRONMENTAL WORK

1a. Value of DEI to environmental work (Q4)

95%+

believe in the value of DEI to environmental work.

Most survey respondents agree or strongly agree that DEI practices are important for:

- ✓ Strengthening our ability to advocate effectively for improving the environment.
- ✓ Increasing the number and diversity of people advocating for environmental issues, securing environmental funding and/or making funding decisions.
- ✓ Improving the quality-of-life in the communities.
- ✓ Improving the environment.

1b. Organizational capacity for partnership with diverse or underserved communities (Q5)

- Respondents tend to perceive their organizations as working proactively at partnerships with diverse or underserved communities.
- Respondents also indicate they are lacking tools, trainings and resources to support DEI work.

Percent Respondents who agree or strongly agree that their organization:	
works proactively to increase capacity to work effectively with diverse and/or underserved communities.	85%
builds collaborative relationships with community-based organizations and leaders from diverse and/or underserved communities.	84%
aligns environmental projects and programs with broader community interests and needs that can benefit diverse and/or underserved communities.	74%
has developed effective, culturally appropriate outreach strategies and/or materials to support outreach in diverse and/or underserved communities.	43%
provides adequate tools and trainings that help increase the effectiveness of staff and volunteers who are working in diverse and/or underserved communities.	37%
has the tools and expertise needed to connect with non-English speaking communities.	23%

1c. Representation in environmental work (Q6)

Respondents identified the following groups as "under-represented" or "not represented" to varying degrees in their organization's environmental work:

Percent of respondents who perceive the following groups as "under-represented" or "not represented".	
Migrant farmworkers	64%
Subsistence fishers	50%
Social justice organizations (e.g., ACLU, NAACP)	49%
Communities of color	40%
Watermen	39%
Family farmers	37%
Low income communities	35%
Public health community	33%
Faith communities	30%
Rural communities	23%
Hunters / anglers	20%
Non-environmental, community-based organizations	19%
Recreational users	14%
Local government staff	11%
Urban communities	9%

1d. Challenges to developing diverse partnerships (Q7)

70%   Struggle with finding the resources, time, or organizational support for developing diverse partnerships.

55%   Experience communication technologies barriers and a lack of culturally-appropriate materials.

42%   Feel uncertain about whom to reach out to in the community.

33%   Perceive a disconnect between DEI partnerships and their organization's mission.

Respondents shared the following barriers to developing partnerships with diverse and/or underserved communities.	Agree or Strongly Agree
Overworked or lack of time, funding or organizational support.	70%
Lack of culturally appropriate materials to share with the community (e.g., materials in languages other than English)	55%
Technological barriers to communication (e.g., lack of resources to go door-to-door, connectivity, disconnect between preferred methods of communication)	55%
Uncertainty about who to reach out to in the community.	42%
Perceived disconnect with our mission.	33%
Uncertainty over reaching out to groups and/or communities that may be unfamiliar to us.	36%
Perceived lack of connection to our environmental goals.	31%
Uncertainty over how engaging diverse and/or underserved communities can improve environmental outcomes.	27%
Lack of board support.	14%
Social tensions between groups are strained right now.	12%
Anger or distrust between our organization and diverse and/or underserved community.	9%

1e. DEI funding priorities
(Q8)

Respondents would prioritize DEI funding in the following order:

1. Support relationship-building and authentic community engagement in diverse and/or underserved communities. (55%)
2. Directly invest in diverse and/or underserved communities.
3. Organizational/internal DEI.

As you consider your organization's funding and support needs, what priority would you place on the following?	First[1]	Second[1]	Third[1]
Funding for organizational/internal DEI (e.g., DEI awareness and skills building)	21%	30%	49%
Funding to support relationship-building and authentic community engagement in diverse and/or underserved communities	55%	36%	9%
Funding to directly invest in diverse and/or underserved communities (e.g., compensation for local leaders, direct investments in quality-of-life or environmental health improvements)	25%	34%	41%

[1] Percentages are rounded to the nearest whole number; therefore, percentages may not add up to 100%.

1f. Perceptions of DEI at CCWC
(Q9)

94% + Believe diversity is important to achieving the vision of CCWC and support continued DEI investments.

70-78% Believe CCWC values DEI and is taking concrete steps to support its members in this area.

16-18% Don't know if CCWC values DEI and is taking concrete steps to support its members in this area.

Percent Respondents who:	Agree or Strongly Agree	Don't Know
It is important for CCWC and its members to reflect the diversity of the Chesapeake Bay Watershed region in order to achieve the coalition's vision.	94%	1%
CCWC values Diversity, Equity and Inclusion.	78%	16%
CCWC is taking concrete steps to support its members in strengthening DEI in the Chesapeake Bay Watershed.	71%	18%
CCWC should continue to invest resources in strengthening DEI practices.	95%	2%

NON-FUNDERS
ADVANCING DEI WITHIN OUR ORGANIZATIONS

2a. Value of DEI to our organization (Q11)

93% + Believe DEI can advance their organization's mission, help reflect and serve diverse populations, and broaden the organization's base for advocacy.

74-79% Believe DEI can improve the quality of work life, improve hiring and retention of diverse staff, and broaden the organizations' opportunities for fundraising.

18-25% Are neutral or don't know if DEI can improve the quality of work life, improve hiring and retention of diverse staff, and broaden the organizations' opportunities for fundraising.

Advancing diversity, equity and inclusion within our organization could:	Agree or strongly agree	Neutral or Don't Know
Strengthen the ability to advance our mission	95%	3%
Enable us to better reflect and serve diverse populations through our work	96%	3%
Improve the quality of work life	74%	25%
Improve hiring and retention of diverse staff	79%	18%
Broaden our base for advocacy	93%	5%
Broaden our opportunities for fundraising	75%	21%

2b. Organizational culture around DEI (Q12)

- Respondents tend to believe their organizations are welcoming and inclusive to staff and volunteers from diverse backgrounds.
- Respondents are less likely to believe staff and volunteers have a mechanism or process to discuss or influence DEI challenges and opportunities.
- Respondents who did not agree or strongly agree tend to either be neutral or indicate uncertainty about aspects of their organization's culture around DEI.

Indicate the extent to which you agree with the following statements:	Agree or strongly agree	Neutral or Don't Know	Disagree or strongly disagree
Our organization is welcoming and inclusive for staff and volunteers from diverse backgrounds and perspectives.	81%	14%	4%
Staff and volunteers have a mechanism and/or process to raise questions about the way DEI challenges and opportunities impact our organization's work.	46%	32%	22%
Staff and volunteers believe their feedback will be implemented or acted upon.	65%	27%	9%

2c. Organizational Commitment TO DEI (Q13)

89%   Believe their organization values DEI.

50-54%   Believe that there is an "authorizing environment" to support DEI and that day-to-day priorities and programs reflect DEI goals.

22%   Believe that there is an effective process in place to monitor DEI progress.

Percent of respondents who agree or strongly agree that their organization:	Agree or strongly agree
values Diversity, Equity and Inclusion.	89%
has a clearly articulated mission and/or vision that integrates diversity, equity and inclusion.	54%
has a clearly articulated policy and/or goals related to diversity, equity and inclusion.	50%
day-to-day priorities and programs reflect DEI goals.	50%
has an effective monitoring and improvement process for meeting our DEI goals.	22%

2d. Reflecting regional diversity
(Q14, Q16, Q18)

Most respondents do not believe their organization reflects the region's diversity.

68-76% Believe their board reflects the region's gender diversity.
Believe staff, volunteers and contractors reflect the region's age and gender diversity.

< 20% Believe their board reflects the region's racial/ethnic or socioeconomic diversity.
Believe their senior management reflects the region's racial/ethnic diversity.

Our organization reflects our region's diversity in: (% agree or strongly agree)	Board	Senior Management	Staff, Volunteers and/or Contractors
Age	38%	55%	**73%**
Gender	**68%**	63%	**76%**
Race/ethnicity	**18%**	**19%**	39%
Gender identity/Sexual orientation	21%	23%	31%
Educational attainment	29%	34%	47%
Socioeconomic status	**19%**	26%	41%

2e. Board and senior management capacity for DEI
(Q15, Q17)

- Respondents tend to believe their senior management has a higher capacity for DEI than their board.

- For both senior management and boards, respondents see a gap between a strong support and intent for DEI and a lack of skills and tools needed to advance DEI.

- Respondents tended to disagree with the notion that their senior management or boards feel the organization is doing well enough to not need to focus on DEI challenges and opportunities.

Respondents that believe their board and senior management...	Board (% agree or strongly agree)	Senior Management (% agree or strongly agree)
believes DEI is integral for achieving our organization's mission.	59%	86%
often or regularly discusses DEI challenges and opportunities.	35%	63%
feels our organization is performing well in DEI and that they therefore don't need to focus on DEI challenges and opportunities.	12%	11%
actively identifies strategies to advance DEI.	24%	54%
has the skills and tools needed to advance DEI.	19%	38%

2f. DEI capacity of staff, volunteers and/or contractors (Q19)

34-42% Believe their organization is effective at recruiting, supporting, retaining and/or promoting staff, volunteers and/or contractors from diverse backgrounds.

24-28% Believe their organization's staff, volunteers and/or contractors have the skills and tools needed to advance DEI and believe their organization provides appropriate training to improve their DEI skills.

Respondents feel their organization...	Agree or strongly agree
is effective at supporting and retaining staff and/or volunteers from diverse backgrounds.	42%
is effective at recruiting qualified staff, volunteers and/or contractors from diverse backgrounds.	38%
is effective at promoting staff from diverse backgrounds within the organization.	34%
staff, volunteers and/or contractors have the skills and tools needed to advance DEI.	28%
provides staff, volunteers and/or contractors with appropriate training opportunities to improve skills in DEI.	24%

FUNDERS
RESPONDENTS

Non-funder Survey Respondents

	Number or Percent of Respondents
RESPONDENTS AND ORGANIZATIONS	
Number of respondents	25
Number of organizations	15
RACE AND ETHNICITY[1] **(Q28)**	
Respondents who identify with a white racial or ethnic background	87%
Respondents who identify with racial or ethnic backgrounds of color	22%
Prefer not to say	0%
ROLE IN THE ORGANIZATION (Q25)	
Board	17%
Senior Management	57%
Staff	26%
Donor	0%
Volunteer	0%
Contractor	0%

[1] Note that this question allowed respondents to check all racial/ethnic identities that apply or "prefer not to say;" therefore, percentages may not add up to 100%.

FUNDERS
ADVANCING DEI IN OUR ENVIRONMENTAL WORK

Ia. Value of DEI to environmental work (Q4)

92%+

believe in the value of DEI to environmental work.

Most survey respondents agree or strongly agree that DEI practices are important for:

- ✓ increasing the number and diversity of people and constituencies advocating for environmental issues, securing environmental funding and/or making funding decisions.
- ✓ strengthening our ability to advocate effectively for improving the environment.
- ✓ improving community quality-of-life.
- ✓ Improving the environment.

Ib. Organizational capacity for partnerships with diverse or underserved communities (Q5)

- Respondents tend to perceive their organizations as working proactively at partnerships with diverse or underserved communities.
- Respondents also indicate that more can be done to prioritize of DEI applicants and reduce barriers in the grantmaking process for organizations that serve underserved communities.

Respondents who agree or strongly agree that their organization funds:	
projects that align environmental investments with community needs.	88%
organizations serving diverse and/or underserved communities.	88%
projects that promote collaboration among our grantees and diverse and/or underserved communities.	84%
organizations led by people of color.	84%
projects that include relationship-building, environmental health and/or community quality-of-life improvements in diverse and/or underserved communities.	75%
projects that expand DEI awareness and practices within grantee organizations.	60%
social and/or environmental justice work.	52%

Respondents who agree or strongly agree that their organization:	
prioritizes applicants who fully integrate DEI practices in their organizational model.	38%
has implemented strategies to reduce the barriers in the grantmaking process for organizations that serve underserved communities.	36%
Has an explicit DEI criterion in our organization's funding prioritization process.	32%

1c. Representation in environmental work (Q6)

Respondents identified the following groups as "under-represented" or "not represented" to varying degrees in their organization's environmental work

Percent of respondents who perceive the following groups as "under-represented" or "not represented".	
Migrant farmworkers	68%
Watermen	60%
Subsistence fishers	60%
Social justice organizations (e.g., ACLU, NAACP)	56%
Hunters / anglers	44%
Family farmers	40%
Rural communities	32%
Local government staff	32%
Communities of color	29%
Public health community	29%
Low income communities	25%
Non-environmental, community-based organizations	24%
Recreational users	24%
Faith communities	20%
Urban communities	4%

1d. Challenges to developing diverse partnerships (Q7)

68%	**Struggle with lack of applications from diverse/underserved communities.**
50-58%	**Lack culturally appropriate materials to share and feel uncertain about whom to reach out to in the community.**
36%	**Struggle with applicants who lack the capacity to manage an award.**
25%	**Perceive a disconnect between DEI partnerships and their organization's mission, perceive a lack of connection to their organization's environmental goals, or are uncertain about how engaging diverse/underserved communities can improve environmental outcomes.**

Respondents shared the following barriers to developing partnerships with diverse and/or underserved communities.	Agree or Strongly Agree
Lack of applications from diverse and underserved communities.	**68%**
Lack of culturally appropriate materials to share with the community (e.g., materials in languages other than English).	**58%**
Uncertainty over whom to reach out to in the community.	**50%**
Organizations applying lack capacity to manage an award (e.g., internal controls, legal requirements, reporting).	36%
Perceived disconnect with our mission.	25%
Perceived lack of connection to our environmental goals.	25%
Uncertainty over how engaging diverse and underserved communities can improve environmental outcomes.	25%
Organizations applying do not meet eligibility criteria.	20%
Lack of board support.	17%

1e. Proposal review process (Q8)

- 52% of the respondents indicate that their organization prioritizes proposals that integrate DEI in some fashion.

- Responses also indicate that the proposal review process has the potential to improve significantly in terms of outreach to and supports for diverse audiences, assessment and prioritization of DEI applicants, and criteria for tracking grantee progress on DEI.

Respondents agree or strongly agree that their organization:	
prioritizes proposals that integrate DEI practices, relationship-building, environmental health and/or community quality of life considerations throughout the work and/or organization.	52%
has a strategy and plan in place for assisting lower-capacity organizations through our proposal review process.	36%
explicitly assesses the applicant's submission through an equity lens.	32%
prioritizes proposals that are directly led by diverse and/or underserved communities.	28%
explicitly assesses the cultural competency of the applicant organization.	20%
has a robust outreach plan for disseminating and soliciting proposals and application materials to a wide and diverse audience.	16%
has effective criteria for tracking grantee progress on DEI efforts over time.	4%

1f. Perceptions of DEI at CBFN (Q9)

83-84% Believe reflecting regional diversity is important to achieving the mission of CBFN and support continued DEI investments.

76% Believe CBFN values DEI.

64% Believe CBFN includes a range of foundation types that represent a diverse range of issues.

4% Believe foundation representatives at CBFN meetings reflect regional diversity.

A significant minority of respondents indicate uncertainty about these statements, but there does not appear to be entrenched opposition to these statements.

Percent Respondents who believe:	Agree or Strongly Agree	Don't Know
CBFN values Diversity, Equity and Inclusion.	76%	20%
It is important for CBFN to reflect the diversity of the Chesapeake Bay Watershed region in order to achieve the network's mission.	84%	12%
CBFN includes a range of foundation types that represent a diverse range of issues.	64%	20%
Foundation representatives at CBFN meetings reflect the diversity of the Chesapeake Bay Watershed region.	4%	28%
CBFN should continue to invest resources in strengthening DEI practices.	83%	4%

FUNDERS

ADVANCING DEI WITHIN OUR ORGANIZATIONS

2a. Value of DEI to our organization (Q11)

77-86% Believe DEI can advance their organization's mission, help reflect and serve diverse populations, and improve hiring and retention of diverse staff.

55-65% Believe DEI can improve the quality of work life, broaden the organization's base for advocacy.

38% Believe DEI can broaden the organization's opportunities for fundraising.

Respondents who did not agree or strongly agree tend to either be neutral or indicate uncertainty about whether DEI would advance these outcomes; respondents do not tend to have deeply entrenched beliefs against the value of DEI.

Advancing diversity, equity and inclusion within our organization could:	Agree or strongly agree	Neutral or Don't Know
Strengthen the ability to advance our mission	77%	23%
Enable us to better reflect and serve diverse populations through our work	86%	14%
Improve the quality of work life	64%	32%
Improve hiring and retention of diverse staff	82%	14%
Broaden our base for advocacy	55%	45%
Broaden our opportunities for fundraising	38%	52%

2b. Organizational culture around DEI
(Q12)

- 65% of respondents believe their organizations are welcoming and inclusive to staff and volunteers from diverse backgrounds.
- Respondents are less likely to believe staff and volunteers have a mechanism or process to discuss or influence DEI challenges and opportunities.
- Respondents who did not agree or strongly agree tend to either be neutral or indicate uncertainty about aspects of their organization's culture around DEI.

Indicate the extent to which you agree with the following statements:	Agree or strongly agree	Neutral or Don't Know	Disagree or strongly disagree
Our organization is welcoming and inclusive for staff and volunteers from diverse backgrounds and perspectives.	65%	35%	0%
Staff and volunteers have a mechanism and/or process to raise questions about the way DEI challenges and opportunities impact our organization's work.	55%	27%	18%
Staff and volunteers believe their feedback will be implemented or acted upon.	48%	48%	4%

2c. Organizational commitment to DEI
(Q13)

86% Believe their organization values DEI.

23-36% Believe that there is an "authorizing environment" to support DEI and that day-to-day priorities and programs reflect DEI goals.

9% Believe that there is an effective process in place to monitor DEI progress.

Indicate the extent to which you agree with the following statements:	Agree or strongly agree
Our organization values Diversity, Equity and Inclusion.	**86%**
Our organization has a clearly articulated policy and/or goals related to diversity, equity and inclusion.	36%
Our organization has a clearly articulated mission and/or vision that integrates diversity, equity and inclusion.	23%
Our organization's day-to-day priorities and programs reflect DEI goals.	23%
Our organization has an effective monitoring and improvement process for meeting our DEI goals.	9%

2d. Reflecting regional diversity (Q14, Q16, Q18)

Most respondents do not believe their organization reflects the region's diversity.

43-52% — Believe their senior management reflects the region's gender diversity.
Believe staff, volunteers and contractors reflect the region's age and gender diversity.

< 20% — Believe their board and senior management reflect the region's diversity of race/ethnicity, gender identity/sexual orientation, educational attainment or socioeconomic status.

Our organization reflects our region's diversity in: (% agree or strongly agree)	Board	Senior Management	Staff, Volunteers and/or Contractors
Age	23%	19%	43%
Gender	30%	52%	48%
Race/ethnicity	13%	14%	38%
Gender identity/Sexual orientation	5%	14%	33%
Educational attainment	9%	14%	29%
Socioeconomic status	0%	10%	19%

2e. Board and senior management capacity for DEI (Q15, Q17)

- Respondents tend to believe their senior management has a higher capacity for DEI than their board.

- For both senior management and boards, respondents see a gap between a strong support and intent for DEI and a lack of skills and tools needed to advance DEI.

- Respondents tended to disagree with the notion that their senior management or boards feel the organization is doing well enough to not need to focus on DEI challenges and opportunities.

Respondents agree or strongly agree that their board and senior management:	Board (% agree or strongly agree)	Senior Management (% agree or strongly agree)
believes DEI is integral for achieving our organization's mission.	39%	71%
often or regularly discusses DEI challenges and opportunities.	18%	57%
feels our organization is performing well in DEI and that they therefore don't need to focus on DEI challenges and opportunities.	9%	5%
actively identifies strategies to advance DEI.	23%	48%
has the skills and tools needed to advance DEI.	14%	24%

2f. DEI capacity of staff, volunteers and/or contractors (Q19)

30% Believe their organization provides appropriate training to improve their DEI skills.

20-25% Believe their organization is effective at recruiting, supporting, retaining and/or promoting staff, volunteers and/or contractors from diverse backgrounds.

20% Believe their organization's staff, volunteers and/or contractors have the skills and tools needed to advance DEI.

Percent of respondents who agree or strongly agree that their organization:	Agree or strongly agree
provides staff, volunteers and/or contractors with appropriate training opportunities to improve skills in DEI.	30%
is effective at supporting and retaining staff and/or volunteers from diverse backgrounds.	25%
is effective at recruiting qualified staff, volunteers and/or contractors from diverse backgrounds.	20%
is effective at promoting staff from diverse backgrounds within the organization.	20%
has staff, volunteers and/or contractors with the skills and tools needed to advance DEI.	20%

Appendix 4. DEI Readiness Assessment Summary Memo

Skeo

WORKING DRAFT MEMORANDUM

Date: September 7, 2018

To: Chanté Coleman, Choose Clean Water Coalition
                 Jamie Baxter, Chesapeake Bay Funders Network
                 Kacey Wetzel, Chesapeake Bay Trust
                 Megan Milliken, Chesapeake Bay Funders Network

From: Vernice Miller-Travis, Skeo
                 Sarah Malpass, Skeo
                 Miranda Maupin, Skeo

Re: DEI Readiness Assessment

Introduction

At the request of a project team composed of the Chesapeake Bay Trust (CBT), the Chesapeake Bay Funders Network (CBFN), and the Choose Clean Water Coalition (CCWC), Skeo has supported the development and implementation of a DEI Readiness Assessment that included development of:

- DEI Assessment Framework (Attachment A)
- DEI Assessment Survey (Attachment B)
- DEI Assessment Survey Results and Analysis of Key Themes (Attachment C)
- DEI Assessment: Notes from the Roundtable Discussions (Attachment D)

The process also included the following facilitated stakeholder engagement, discussion and training opportunities:
- *May 2017* – Engagement of stakeholders at the 2017 Choose Clean Water Conference to offer their feedback on the DEI Assessment Framework
- *September 2017* – Facilitation of a training workshop and roundtable discussion at the 2017 CBFN Annual Retreat
- *November 2017* – Engagement of EJ/underserved/marginalized communities through a roundtable discussion held in partnership with Dr. Sacoby Wilson at the University of Maryland School of Public Health
- *December 2017* – Facilitation of a training workshop and roundtable discussion at the 2017 CCWC Annual Meeting
- *May 2018* – Engagement of stakeholders at the 2018 Choose Clean Water Conference to share the preliminary results of the DEI Assessment Survey

This memo captures key findings from the DEI Readiness Assessment survey, a summary of priority challenge and opportunity areas identified by Skeo, high level recommendations regarding what the DEI Plan should address, and next steps for the Project Team.

Key Findings from the DEI Readiness Assessment Survey

This summary includes key findings from both the non-funders and funders surveys. These surveys were designed to explore the ability of funders and grantees to: (1) effectively work and engage with people from different backgrounds; and (2) recognize, respond and remove organizational barriers to diversity, equity and inclusion.

For a summary of results that includes data charts, please see the PDF presentation slides. The summary graphs and raw data files for both surveys have also been shared previously with the Project Team.

Important notes for interpreting the survey findings include:

- Results represent the beliefs of survey respondents. For example, responses to 1c represent a belief about what groups are and are not represented in environmental work (not hard data on actual numerical representation).
- Survey respondents were not required to answer every question; therefore, results represent the percent of respondents for a particular question.
- The non-funders survey includes respondents who are Choose Clean Water Coalition members and/or grantees of Chesapeake Bay Funders Network members.
- The funders survey includes respondents who are members of the Chesapeake Bay Funders Network.

Survey Respondents

The following table summarizes information about who responded to the DEI Assessment Survey. Additional demographic data about respondents is available in the raw data files for both surveys.

	Non-Funders	Funders
Respondents and Organizations		
Number of respondents	199	25
Number of organizations[1]	122	15
Race and Ethnicity[2]		
Respondents who identify with a white racial or ethnic background	83%	87%
Respondents who identify with racial or ethnic backgrounds of color	17%	22%
Prefer not to say	3%	0%
Role in the Organization		
Board	22%	17%
Senior Management	41%	57%
Staff	33%	26%
Donor	0%	0%
Volunteer	3%	0%

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[1] Some respondents chose not to indicate the name of their organization. Additionally, responses from different chapters of the same organization were counted as distinct organizations.

[2] This question allowed respondents to check all racial/ethnic identities that apply or "prefer not to say;" therefore, percentages may not add up to 100%.

Part 1. Advancing DEI in Our Environmental Work

The following table summarizes key findings from Part 1 of the survey – Advancing DEI in Our Environmental Work.

Non-Funders	Funders
1a. Value of DEI to Environmental Work (Q4)	
- 95% + believe in the value of DEI to environmental work.	- 92% + believe in the value of DEI to environmental work.
1b. Organizational Capacity for Partnership with Diverse or Underserved Communities (Q5)	
- Respondents tend to perceive their organizations as working proactively at partnerships with diverse or underserved communities. - Responses also indicate that they are lacking tools, trainings and resources to support DEI work.	- Respondents tend to perceive their organizations as working proactively at partnerships with diverse or underserved communities. - Responses also indicate that more can be done to promote the prioritization of DEI applicants as well as reduce barriers in the grantmaking process for organizations that serve underserved communities.
1c. Representation in Environmental Work (Q6)	
Respondents identified the following groups as "under-represented" or "not represented" to varying degrees in their organization's environmental work: ▪ Migrant farmworkers (64%) ▪ Subsistence fishers (50%) ▪ Social justice organizations (49%) ▪ Communities of color (40%) ▪ Watermen (39%) ▪ Family Farmers (37%) ▪ Low-income communities (35%) ▪ Public health community (33%) ▪ Faith communities (30%) ▪ Rural communities (23%) ▪ Hunters/anglers (20%) ▪ Non-environmental, community-based organizations (19%) ▪ Recreational users (14%) ▪ Local government staff (11%) ▪ Urban communities (9%)	Respondents identified the following groups as "under-represented" or "not represented" to varying degrees in their organization's environmental work: ▪ Migrant farmworkers (68%) ▪ Subsistence fishers (60%) ▪ Watermen (60%) ▪ Social justice organizations (56%) ▪ Hunters / anglers (44%) ▪ Family Farmers (40%) ▪ Rural communities (32%) ▪ Local government staff (32%) ▪ Communities of color (29%) ▪ Public health community (29%) ▪ Low-income communities (25%) ▪ Non-environmental, community-based organizations (24%) ▪ Recreational users (24%) ▪ Faith communities (20%) ▪ Urban communities (4%)
1d. Challenges to Developing Diverse Partnerships (Q7)	
- 70% struggle with finding the time, funding or organizational support to develop diverse partnerships - 55% experience communication technology barriers to communication and a lack of culturally-appropriate materials. - 42% feel uncertain about whom to reach out in the community. - 33% perceive a disconnect between DEI partnerships and their organization's mission.	- 68% struggle with lack of applications from diverse/underserved communities. - 50-58% lack of culturally appropriate materials to share and feel uncertain about whom to reach out to in the community. - 36% struggle with organizations who apply lacking the capacity to manage an award. - 25% perceive a disconnect between DEI partnerships and their organization's mission, perceive a lack of connection to their organization's environmental goals, or are uncertain about how engaging diverse/underserved communities can improve environmental outcomes.

Non-Funders	Funders
1e. DEI Funding Priorities (Q8)	**1e. Proposal Review Process (Q8)**

Respondents would prioritize DEI funding in the following order:
 	
  1. Support relationship-building and authentic community engagement in diverse and/or underserved communities.
 	
  2. Directly invest in diverse and/or underserved communities.
 	
  3. Organizational/internal DEI.
	- 52% of the respondents indicate that their organization prioritizes proposals that integrate DEI in some fashion.
	- Respondents also note that the proposal review process at their organizations has the potential to improve significantly in terms of:
	  ▪ outreach to and supports for diverse audiences,
	  ▪ assessment and prioritization of DEI applicants, and
	  ▪ criteria for tracking grantee progress on DEI efforts over time.

1f. Perceptions of DEI at CCWC (Q9)	**1f. Perceptions of DEI at CBFN (Q9)**
- 94%+ believe diversity is important to achieving the vision of CCWC and support continued DEI investments. - 70-78% believe CCWC values DEI and is taking concrete steps to support its members in this area. - 16-18% don't know if CCWC values DEI and is taking concrete steps to support its members in this area.	- 83-84% believe reflecting regional diversity is important to achieving the mission of CBFN and support continued DEI investments. - 76% believe CBFN values DEI. - 64% believe CBFN includes a range of foundation types that represent a diverse range of issues. - 4% believe foundation representatives at CBFN meetings reflect regional diversity. - A significant minority of respondents indicate uncertainty about these statements, but there does not appear to be entrenched opposition to these statements.

Part 2. Advancing DEI within Our Organizations

The following table summarizes key findings from Part 2 of the survey – Advancing DEI within Our Organization.

Non-Funders	Funders
2a. Value of DEI to Our Organization (Q11)	
- 93%+ believe DEI can advance their organization's mission, help reflect and serve diverse populations, and broaden the organization's base for advocacy. - 74-79% believe DEI can improve the quality of work life, improve hiring and retention of diverse staff, and broaden the organizations' opportunities for fundraising. - 18-25% are neutral or don't know if DEI can improve the quality of work life, improve hiring and retention of diverse staff, and broaden the organizations' opportunities for fundraising.	- 77-86% believe DEI can advance their organization's mission, help reflect and serve diverse populations, and improve hiring and retention of diverse staff. - 55-65% believe DEI can improve the quality of work life, broaden the organizations' base for advocacy. - 38% believe DEI can broaden the organization's opportunities for fundraising. - Respondents who did not agree or strongly agree tend to either be neutral or indicate uncertainty about whether DEI would advance these outcomes; respondents do not tend to have deeply entrenched beliefs against the value of DEI.
2b. Organizational Culture around DEI (Q12)	
- 81% of respondents believe their organizations are welcoming and inclusive to staff and volunteers from diverse backgrounds. - Respondents are less likely to believe staff and volunteers have a mechanism or process to discuss or influence DEI challenges and opportunities. - Respondents who did not agree or strongly agree tend to either be neutral or indicate uncertainty about aspects of their organization's culture around DEI.	- 65% of respondents believe their organizations are welcoming and inclusive to staff and volunteers from diverse backgrounds. - Respondents are less likely to believe staff and volunteers have a mechanism or process to discuss or influence DEI challenges and opportunities. - Respondents who did not agree or strongly agree tend to either be neutral or indicate uncertainty about aspects of their organization's culture around DEI.
2c. Organizational Commitment to DEI (Q13)	
- 89% of respondents believe their organization values DEI. - 50-54% of respondents believe that there is an "authorizing environment" to support DEI and that day-to-day priorities and programs reflect DEI goals. - 22% of respondents believe that there is an effective process in place to monitor DEI progress.	- 86% of respondents believe their organization values DEI. - 23-36% of respondents believe that there is an "authorizing environment" and processes in place to support DEI. - 9% of respondents believe that there is an effective process in place to monitor DEI progress.
2d. Reflecting Regional Diversity (Q14, Q16, Q18)	
- Most respondents do not believe their organization reflects the region's diversity at the board, senior management, or staff/volunteer/contractor levels. - 68-76% believe their board reflects the region's gender diversity and believe staff, volunteers and contractors reflect the region's age and gender diversity. - < 20% believe their board reflects the region's racial/ethnic diversity or socioeconomic diversity and believe their senior management reflects the region's racial/ethnic diversity.	- Most respondents do not believe their organization reflects the region's diversity at the board, senior management, or staff/volunteer/contractor levels. - 43-52% believe their senior management reflects the region's gender diversity and believe staff, volunteers and contractors reflect the region's age and gender diversity. - < 20% believe their board and senior management reflect the region's diversity of race/ethnicity, gender identity/sexual orientation, educational attainment or socioeconomic status.
2e. Board and Senior Management Capacity for DEI (Q15, Q17)	

Non-Funders	Funders
- Respondents tend to believe their senior management has a higher capacity for DEI than their board. - For both senior management and boards, respondents see a gap between a strong support and intent for DEI and a lack of skills and tools needed to advance DEI. - Respondents tended to disagree with the notion that their senior management or boards feel the organization is doing well enough to not need to focus on DEI challenges and opportunities.	- Respondents tend to believe their senior management has a higher capacity for DEI than their board. - For both senior management and boards, respondents see a gap between a strong support and intent for DEI and a lack of skills and tools needed to advance DEI. - Respondents tended to disagree with the notion that their senior management or boards feel the organization is doing well enough to not need to focus on DEI challenges and opportunities.
2f. Staff, Volunteers and/or Contractors' Capacity for DEI (Q19)	
- 34-42% believe their organization is effective at recruiting, supporting, retaining and/or promoting staff, volunteers and/or contractors from diverse backgrounds. - 24-28% believe their organization's staff, volunteers and/or contractors have the skills and tools needed to advance DEI and believe their organization provides appropriate training to improve their DEI skills.	- 30% believe their organization provides appropriate training to improve their DEI skills. - 20-25% believe their organization is effective at recruiting, supporting, retaining and/or promoting staff, volunteers and/or contractors from diverse backgrounds. - 20% believe their organization's staff, volunteers and/or contractors have the skills and tools needed to advance DEI.

Priority Challenge and Opportunity Areas

Based on outcomes of the survey and the focus group discussions, Skeo has identified the following priority challenges and opportunities.

Values
1. Participants generally believe
   - DEI is valuable to environmental work;
   - That their organizations are working proactively towards diverse partnerships; and
   - DEI is valuable to advance their organization's mission, help reflect and serve diverse populations, and broaden the organization's base for advocacy
2. Organizations have a gap between the high value placed on DEI and their ability to advance DEI outcomes.

Advancing DEI Outcomes within Our Organizations
3. Organizations often lack a specific commitment to DEI in their policies and operations.
4. Organizations expressed a need to increase their internal diversity of under-represented groups.
5. Organizations expressed a need to increase their DEI capacity at all levels of the organization (e.g., board, senior management, staff and volunteers).

Advancing DEI Outcomes in Our Environmental Work
6. Organizations expressed a need to engage under-represented groups more fully.
7. Organizations lack capacity to increase partnerships with diverse and underserved communities.

Advancing DEI Outcomes in Grant-Making
8. The grant making process tends to not explicitly and consistently incentivize or fund the promotion of DEI.
9. Grant-makers tend not to directly fund environmental justice organizations or work.

Recommendations for the DEI Plan

Based on these priority challenges and opportunities, Skeo has identified a set of recommendations which the DEI Plan should provide strategies to address. Following confirmation of the recommendations by the Project Team, strategies to address each recommendation will be identified and selected based on review of the roundtable discussions, best practices in the field and discussion and deliberation with the Project Team.

Recommendations which the DEI Plan should provide strategies to address include:

1. Celebrate and lift up the DEI mindset that exists in the Chesapeake Bay Watershed Community.
   - Both funders and non-funders have an opportunity to use results of the DEI Readiness Assessment to affirm the positive intent towards DEI that exists within the Chesapeake Bay Watershed Community.
   - Progress already made and current DEI efforts should be more broadly publicized

2. Mind the gap between values and outcomes.
   - Both funders and non-funders have an opportunity to use results of the DEI Readiness Assessment to foster awareness and discussion about existing gaps between values and outcomes, develop their own

organizational action plan for advancing DEI outcomes further, and build momentum for further investment in DEI work.

- CBT, CBFN and CCWC have an opportunity to use the results of the DEI Readiness Assessment to provide venues for training and capacity building, support opportunities for relationship development and provide best practice models that member organizations can use to advance DEI outcomes.
- There is a need to lift-up and publicize the DEI efforts that have already been undertaken and that are currently underway. Regardless of outcome or successful completion, it is important to make it known that DEI efforts are ongoing and have been underway for some time.

3. Set goals to increase engagement with under-represented communities. (funders and non-funders)

4. Increase Capacity for Partnerships with Diverse or Underserved Communities through specific tools trainings and resources to support DEI work. (funders and non-funders)
    - Increase time, funding or organizational support to develop diverse partnerships
    - Address communication technology barriers to communication and a lack of culturally-appropriate materials.
    - Address uncertainty about whom to reach out in the community.
    - Address disconnect between DEI partnerships and their organization's mission.

5. Drive DEI through the grant-making process. (funders)
    - Reduce barriers in the outreach and grantmaking process for organizations that target, prioritize and serve underserved communities.
    - Strengthen tools for prioritizing DEI applicants during the grantmaking process.
    - Incentivize sector progress on DEI via funding priorities that are responsive to grantee interests and needs as well as best practices in the field.
    - Drive grantee and sector progress via reporting mechanisms.

6. Actualize organizational culture and commitment. (funders and non-funders)
    - Ensure mechanism or process for staff and volunteers to discuss or influence DEI challenges.
    - Provide an "authorizing environment" to support DEI.
    - Set up mechanisms that connect day-to-day priorities and programs to DEI goals.
    - Set up processes to monitor DEI progress.

7. Increase representation of under-represented groups. (funders and non-funders)
    - Set goals for increasing diversity and track progress.
    - Provide best practices for recruiting, supporting, retaining and/or promoting staff, volunteers and/or contractors from diverse backgrounds.

8. Increase DEI capacity at all levels of the organization. (funders and non-funders)
    - Strategies for donors, board, and senior management.
    - Strategies for staff and volunteers.

Next Steps

Next steps for the project team include:

- Project Team to review and provide a set of integrated comments on the DEI Readiness Assessment and the proposed DEI Plan outline.
- Skeo to finalize the DEI Readiness Assessment summary memo.
- Skeo to develop a revised DEI Plan outline that responds to Project Team comments and incorporates an additional level of detail on the strategies to be included for each recommendation.
- Project Team and Skeo to review and finalize the outline.
- Skeo to develop a draft DEI Plan and begin workshopping with the Project Team.

Appendix 5. Factor Analysis of DEI Survey Results

The following analysis was developed by staff at the Chesapeake Bay Trust. Special thanks to Jana Davis, Kacey Wetzel and Zack Kelleher.

Summary
Diversity, Equity, and Inclusion Analysis

Summary/Key Points

Section I: Individual Ethnicity and Organization Diversity

Section II: Age and Gender

Section III: Socioeconomics and Ethnicity

Section IV: Organization Size

Section V: Management Role

Section VI: Organization Issue Area (Environmental Only vs. Other issues)

Summary/Key points:

General
- Generally, support for Diversity, Equity, and Inclusion (DEI) work is extremely high.   Opinions on its value consistently scored above 4 on a 1-5 scale.
- Generally, reported opinions rarely differed based on ethnicity of the respondent, but did differ based on age, gender, management role, and to some degree socioeconomics.
- Reported opinions differed consistently based on staff diversity of the organization with which the respondent was associated, but not organization size or organization focus (environment only versus environment plus other issues)

Demography
- Younger people think even more so than older people that DEI helps their organization advance their mission, but older people feel their organizations are more inclusive, better at supporting diverse staff, and more valuing of DEI.
- Women tend to feel a little more strongly than men that DEI practices are important and strengthen their organizations. Interestingly, men report that their organizations have more people of color on staff than women do (Is this a perception or reality issue?), and older men feel most strongly that their organizations are inclusive and welcoming and representative of demographics of the region.
- People who self-report as lower income People of Color (POC) feel distinctly differently than upper-income POC and non-POC (also referred to as Caucasian in this document) on a number of issues: They feel their organizations provide fewer tools and value DEI less. Self-reported lower income people are more concerned about the DEI/mission connection in general.

Organization Type
- People (both POC and non-POC) at diverse organizations (organizations with more even distribution of # of people of color on staff) feel a bit more supported in DEI work: They feel they have more tools, that their organization is working a little harder on DEI issues, etc. This is true for both funders and grantees.

1

- We hear fairly often the concern that DEI could be perceived to be a distraction, not directly connected to mission for environmental organizations. In this survey, this was not the case. Generally, staff feel the DEI/environment connection. There is a slight trend that individuals from more diverse grantee organizations perceive this challenge to be less serious. Funders were the opposite: staff from more diverse funders feel the DEI/environmental connection is a greater challenge
- Organization size was not a big factor, with the exception that people from larger organizations tend to feel their organizations are a bit less welcoming and less open to feedback, though more likely to see DEI as strengthening of their mission.
- The only major factor that differed between organizations strictly focusing on environment issues versus those that include other focuses was that the latter employ more people of color. But in part because opinions of POC versus non-POC weren't that different, responses based on organization type weren't different either.

Role within the Organization
- Staff members tended to see slightly more programmatic importance than board members in DEI work.
- Board members tended to think their organizations are working better at DEI, value DEI more, and are more inclusive than junior staff do, and more senior-level individuals see fewer challenges pertaining to DEI/environment connections. (One must ask the question, however, whether boards simply *think* their organizations value DEI more than junior staff do and *think* organizations are doing DEI work better (but junior staff see what's going on the ground), or whether boards are in fact leading those organizations towards DEI goals more so than junior staff and see the big picture better. Perception versus reality and one can interpret this difference either way.)

Conclusions

Because this survey was based on individual perceptions (e.g., even the income level question did not provide hard ranges), the first lens one must apply to interpreting these data is the fact that we simply don't know whether responses reflect an individual's *perceptions* of his or her organization or *reality*. In addition, one must ask whether, if someone perceives a particular challenge, does that mean the individual is particularly sensitive to DEI issues and his/her organization is therefore doing *well,* or if the organization is indeed stumbling (challenged) on a particular topic. There are many ways to interpret these data, and we must be careful in our interpretations to consider all angles. It can be too tempting to label a sub-segment of the population surveyed as "out of touch" if its responses differ from those of another sub-segment.

In general, though, we can determine that there was no "great divide" in opinions between people of color and non-people of color. Recommendations for training, however, may attempt focus on the fact that younger and more junior staff are seeing things slightly more differently (whether perception or reality) than older and more senior levels of management. Regardless of why that is, perhaps any DEI committee (or really any major decision-making internal body) has at least some younger or more junior staff on it. Training programs may also address some of the discrepancies between board and staff (either educate boards, or get staff on the same page as their boards). Recommendations may also aim to provide staff at larger organizations a few additional tools to feel heard (and hear their staffs).

The biggest driver of differences was how diverse staffs are: Tools might be developed for non- or less-diverse staffs, both to become more diverse in the future, and, in the meantime, to find stronger connections between environment/mission and DEI work and accomplish DEI goals in general.

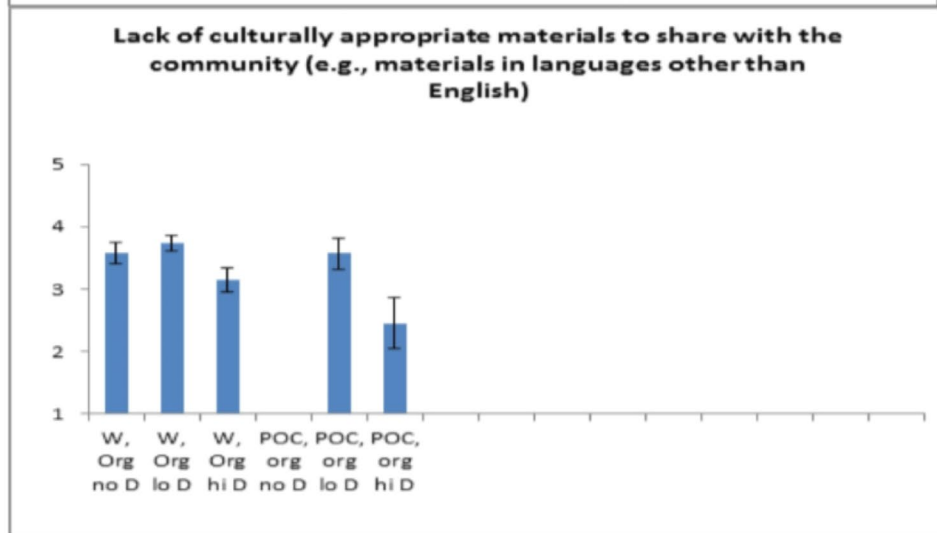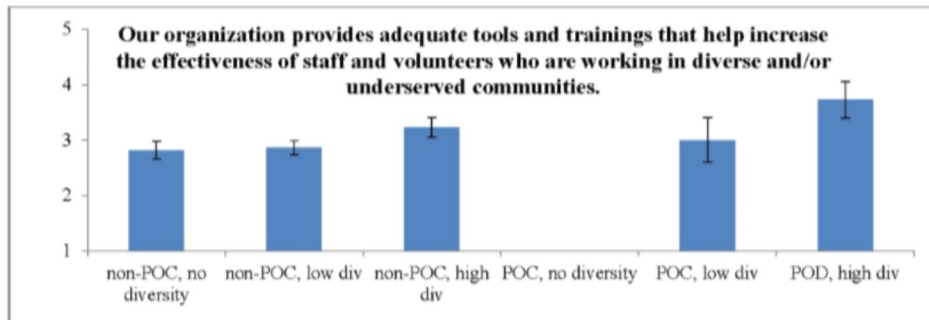# Section I: Ethnicity and Organization Diversity

Do people of color at low diversity orgs (<24%) have different perceptions of whether people of color are supported from a staff-perspective, or whether their organization is working on capacity to work with underserved communities?

ANSWER: Yes. People of color at more diverse organizations feel that their organization provides better tools to help them work in underserved communities, and also that their organizations are working in general more proactively.
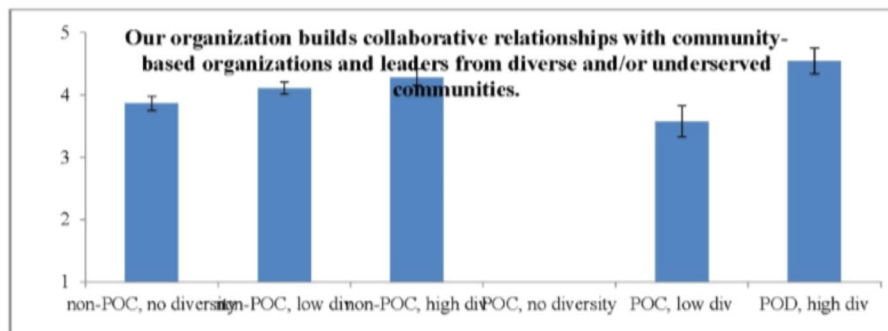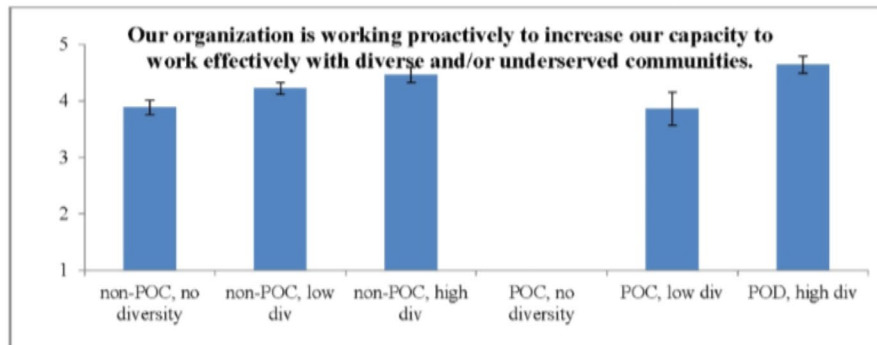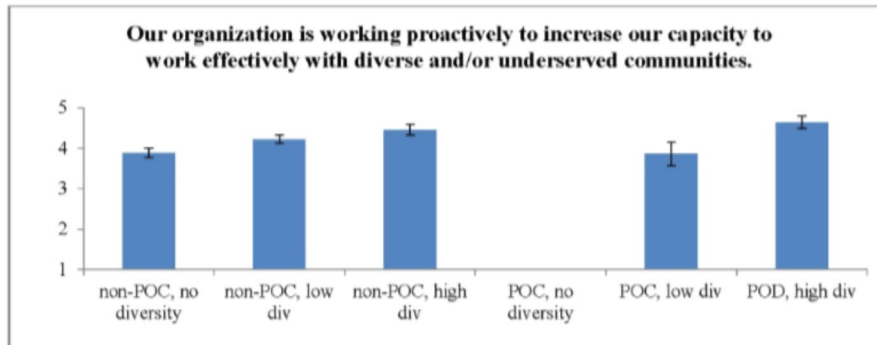

Do people of color at low diversity orgs (<24%) feel they need more tools, more so than people of color at high diversity organization.

ANSWER: Yes. People of color at more diverse organizations feel they have more access to adequate trainings (Figure 3), and people of color at less diverse organizations feel they have a greater challenge in obtaining appropriate materials to share with the community.

Our organization provides adequate tools and trainings that help increase the effectiveness of staff and volunteers who are working in diverse and/or underserved communities.

Lack of culturally appropriate materials to share with the community (e.g., materials in languages other than English)

The other trend: If you are from a highly diverse organization (whether you are a non POC or POC), you feel you are working harder with underserved communities:

4

Our organization is working proactively to increase our capacity to work effectively with diverse and/or underserved communities.

Question: Do people of color vs. non-people of color at different org-diversity levels feel their orgs have a high level of representation of communities of color?

Answer: BOTH organizational diversity and respondent ethnicity matter: In general, non-people of color feel that the level of representation by their orgs of communities of color is lower than POC do (compare left three bars to two right bars). People at more diverse orgs feel their orgs engage communities of colors more. The first part is not consistent with our hypothesis: We would have thought keeping organization-diversity level constant, POC would feel orgs were doing less well engaging communities of color, but instead they feel better. The second part IS consistent with hypothesis: if you are from a highly diverse org, you feel your org is doing better engaging communities of color.

Communities of color
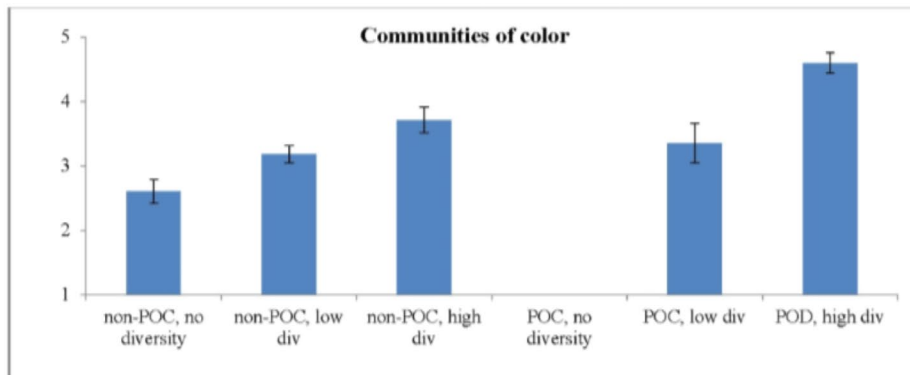
Question: Do staff (of color and not of color) perceive the issue of connection of diversity goals to environmental outcomes differently? Does it matter whether you are at a more diverse organization?

Answer: Generally, Staff of color and not of color do not see a big difference in the challenge of connecting DEI issues to environmental goals. However, there is a slight trend with how diverse your org's staff is: People at more diverse organizations tend to be less uncertain in that connection; they are more comfortable with DEI's connection to environmental outcomes.

Perceived lack of connection to our environmental goals.

Uncertainty over how engaging diverse and/or underserved communities can improve environmental outcomes.
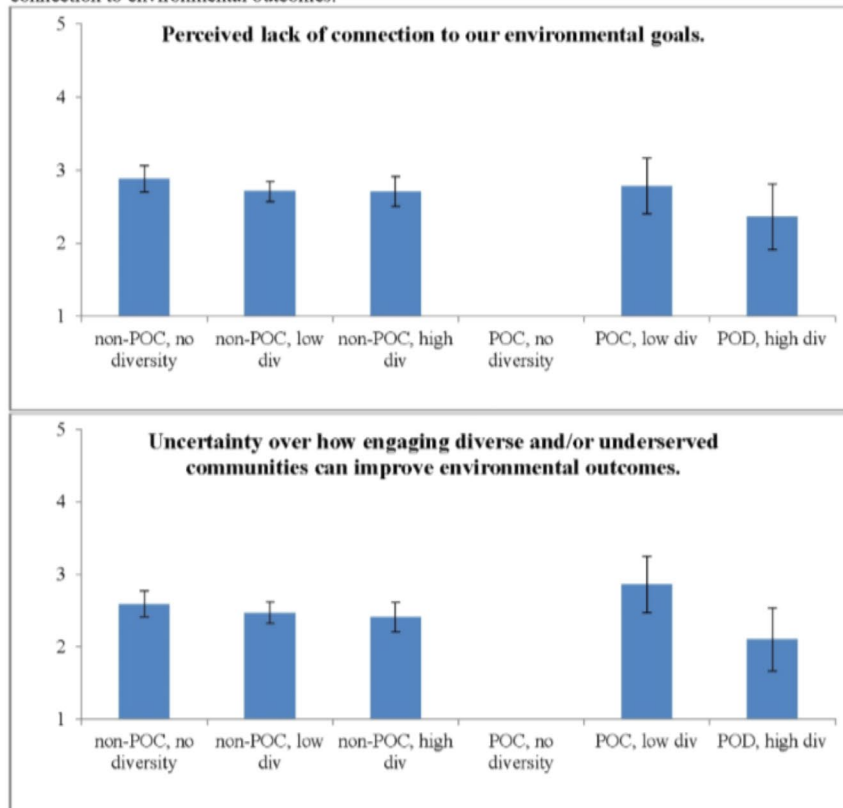
For Funders, there was no difference in terms of ethnicity of individual respondent to importance of DEI work (though note sample size of POC was small; n=5):

It is important that all communities are represented in environmental work.

Our organization values Diversity, Equity and Inclusion.

Our organization is effective at recruiting qualified staff, volunteers and/or contractors from diverse backgrounds.
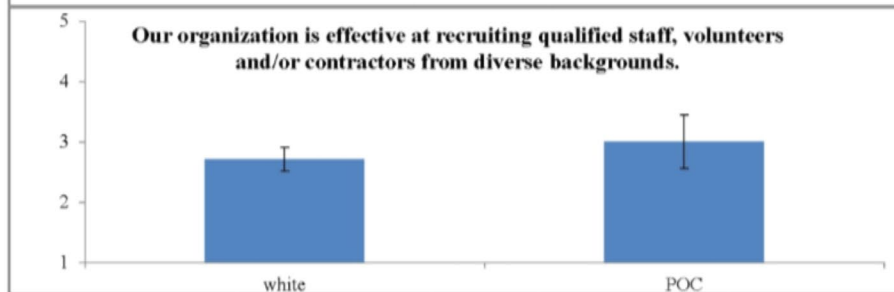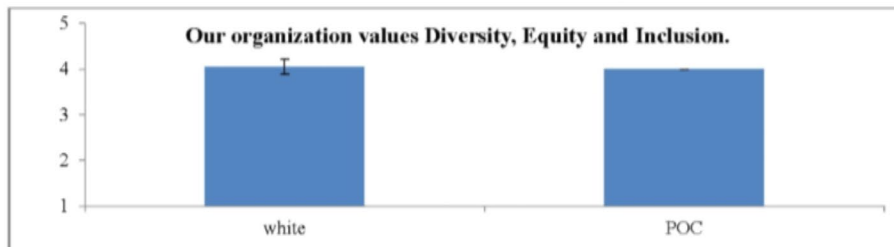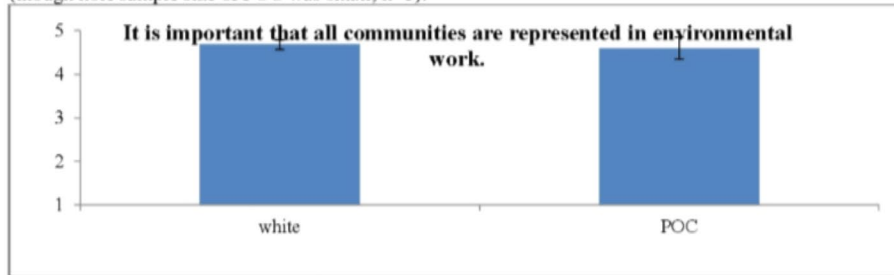
Funders not of color felt that there was a greater challenge of connecting DEI to environmental outcomes:

Challenge to be overcome: Perceived lack of connection to our environmental goals.

7

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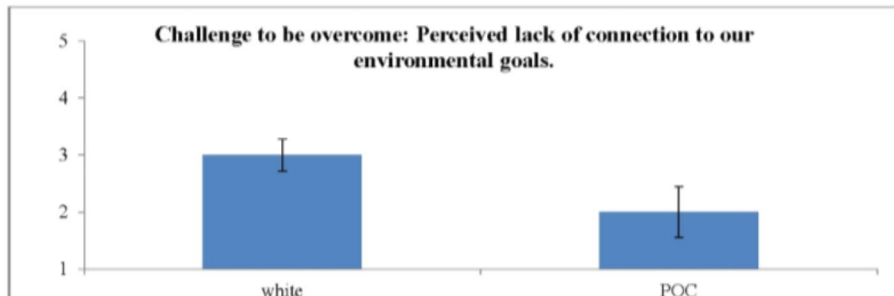
Section IA: Diversity of the organization

Do organizations that are more diverse engage more under-represented groups?

Answer: There is no difference among people who work at orgs of different staff diversity levels in how important they feel engaging "all communities" is. All scores were high: >4.0

Grantees:
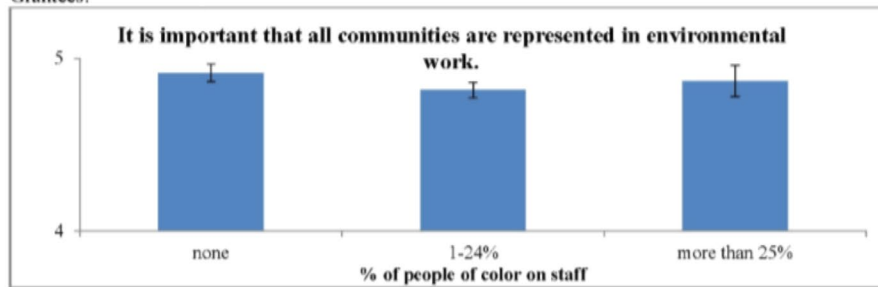
Funders:
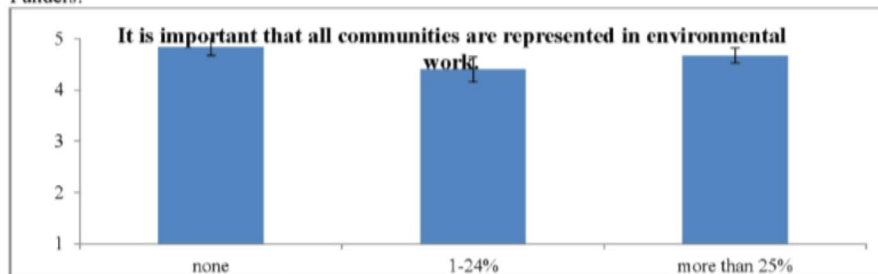
There is no significant difference, though a slight trend, in that grantees at more diverse organizations feel that DEI can improve the environment and that their orgs are working to increase DEI capacity. For funders, diversity of the organization did not matter.

Grantees:

8

Funders:

DEI practices can result in an improved environment in the community(ies) in which you work.
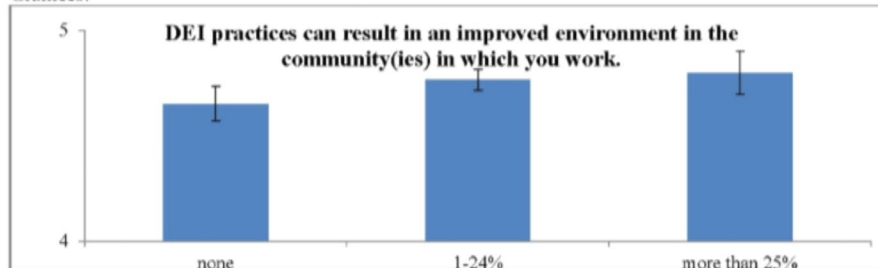
Our organization is working proactively to increase our capacity to work effectively with diverse and/or underserved communities.
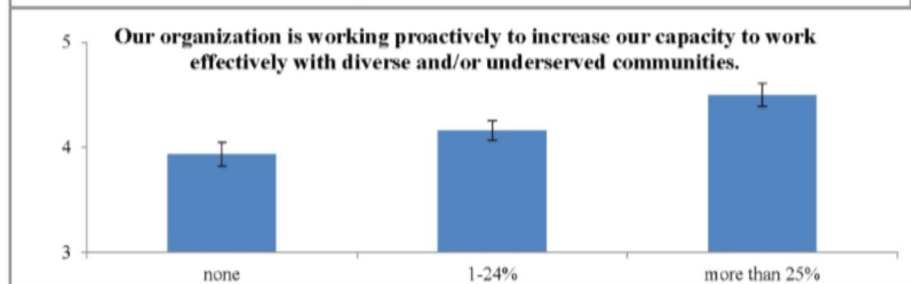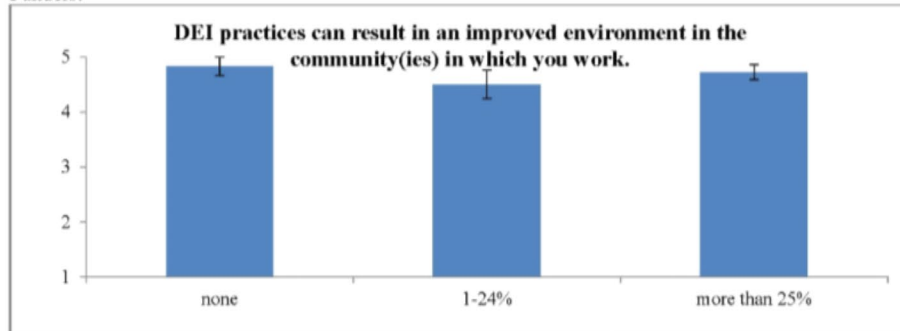
People on more diverse teams at both grantee and funder orgs feel that their organization values DEI a little bit more, though all orgs received high scores. Grantees felt their org values DEI more than funders

Grantees:

Our organization values Diversity, Equity and Inclusion.

Funders

Our organization values Diversity, Equity and Inclusion.

9
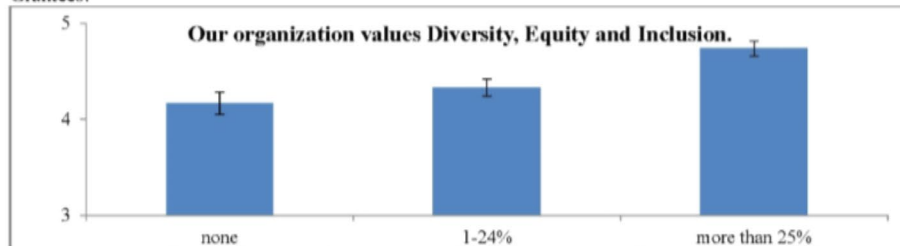
Staff at more diverse organizations feel that advancing DEI work helps their org achieve its mission. Grantees felt this more strongly than funders

Grantees:
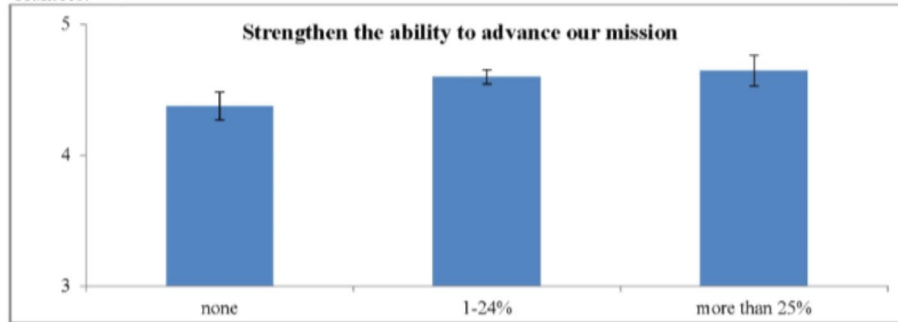
Funders
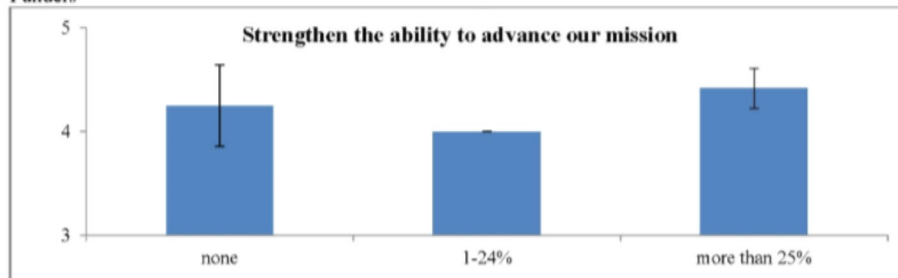
Funders at more diverse organizations feel there is a greater challenge to be overcome in connecting DEI with environmental outcomes. (Organization diversity does not impact how grantee org individuals feel about this challenge)
Funders:

Grantees:

Perceived lack of connection to our environmental goals.
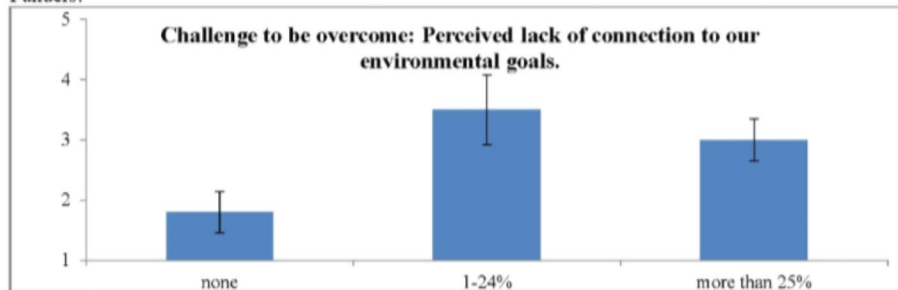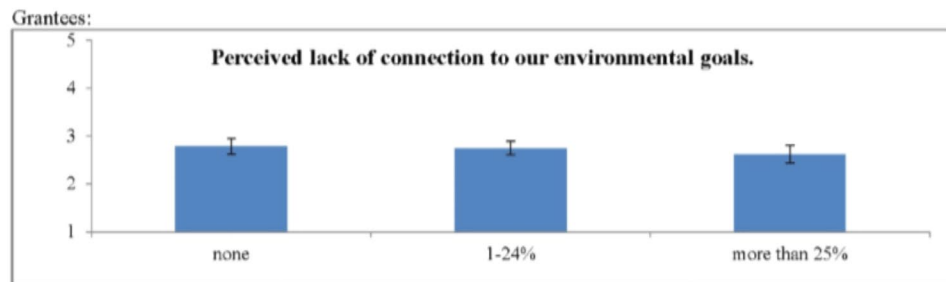
Section II: Age and Gender

Do women and men feel differently, and by age, about how important it is that all communities are represented in environmental work?

Answer: All groups felt strongly that all communities should be represented. Women in the middle age category felt stronger than other groups
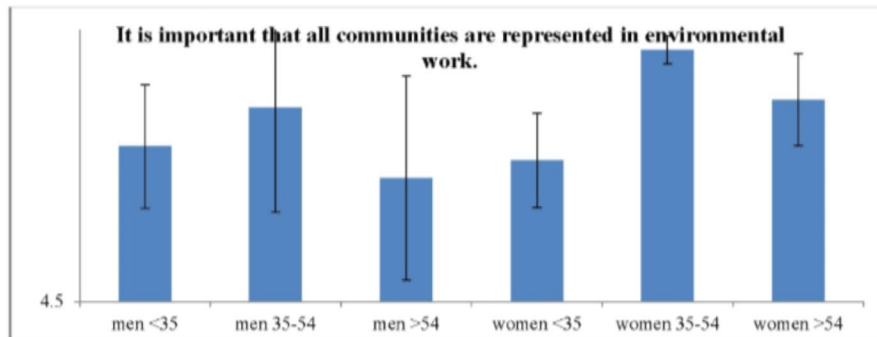
There was no difference among groups for how strongly people felt that DEI practices helped strengthen ability to advocate for env improvement.
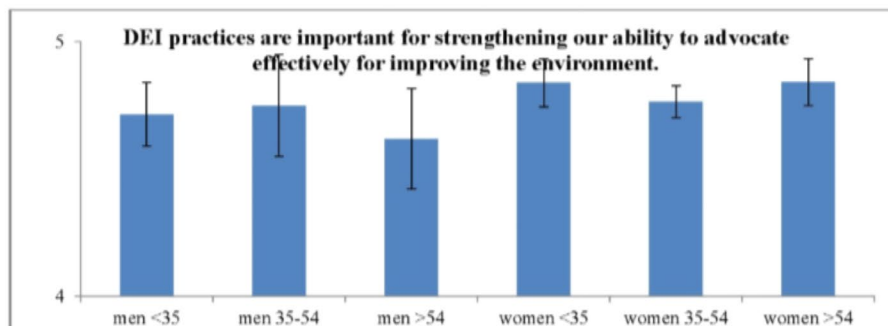
Question: Does age or gender (or a combination) affect the perception of whether advancing diversity strengthens the ability to advance the org's mission?

Answer: Yes: Young people tend to feel DEI is more important, and women tend to feel it's more important. (High variability so would have to run the statistics). It's important to realize that scores are very high overall here.

**Strengthen the ability to advance our mission**
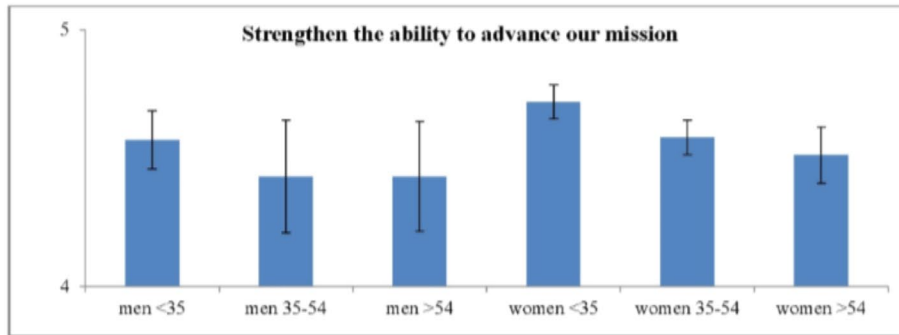
Question: Is there a difference between genders and ages (and combination) in how people feel that advancing DEI helps the org better serve diverse pops?

Answer: Yes to age, no to gender. Men and women feel the same, but younger people feel that DEI helps the org better serve diverse populations, though it's important to note that all scores are about 4, so everyone feels it's important.

Enable us to better reflect and serve diverse populations through our work
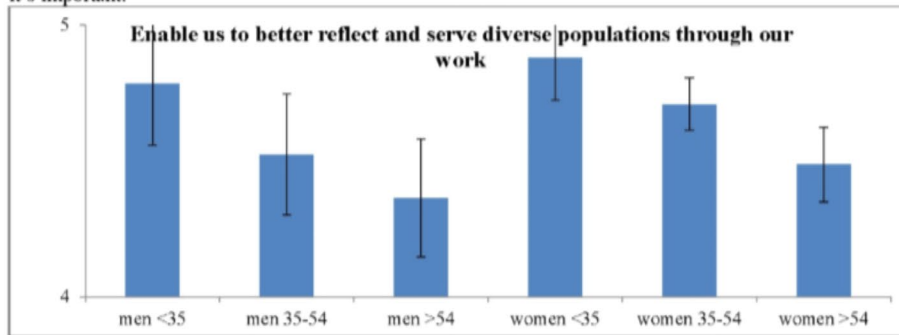
Question: Do people of different genders/ages (or combination) feel their orgs are inclusive to staff/vols of diverse backgrounds.
Answer: Men and women – no difference; But older people tend to feel their organization are more welcoming.

13

Our organization is welcoming and inclusive for staff and volunteers from diverse backgrounds and perspectives.
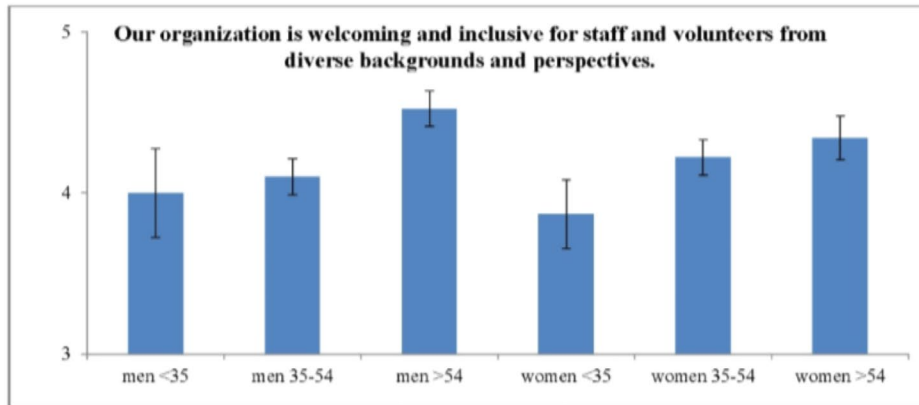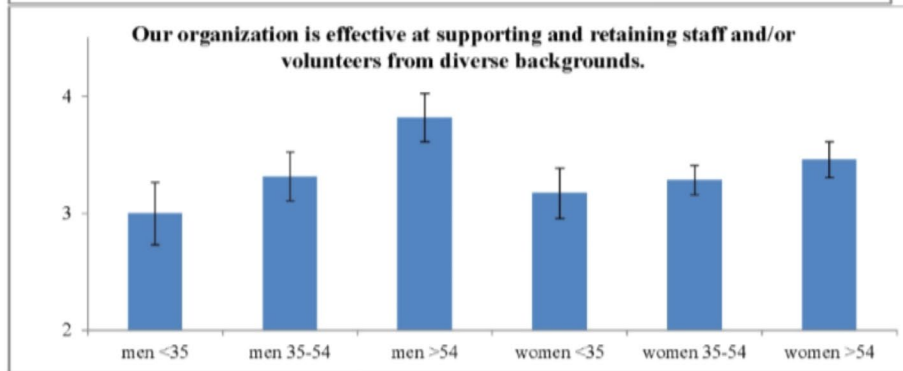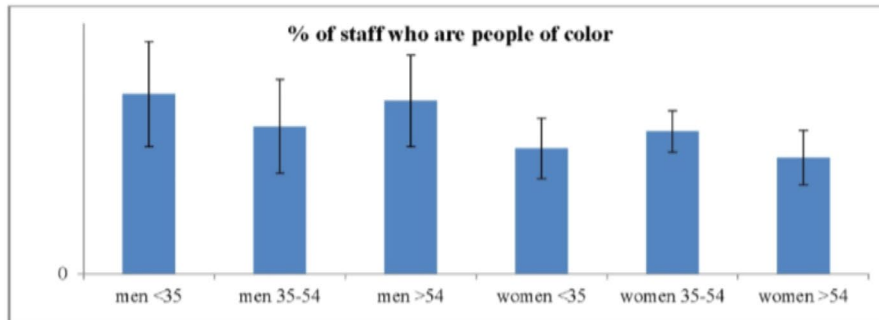
Question: Does gender/age affect whether people feel their organizations' staffs reflect the region's diversity? (But we didn't specify that "diversity" here meant "containing people of color." So, in theory, someone coming from a predominantly Caucasian region might think that their organization represents the diversity of their region if it was mostly white". I.e., diversity =/ "people of color" necessarily in this question)

Answer: Yes: Older people tend to feel their org's represent their region's diversity in terms of ethnicity more than young people. Is that a real difference, or a perception? Older Caucasian men feel their organizations reflect their region's diversity best. Are these people's organizations *really* representing diversity best, or is this a *perception* influenced by age/gender?
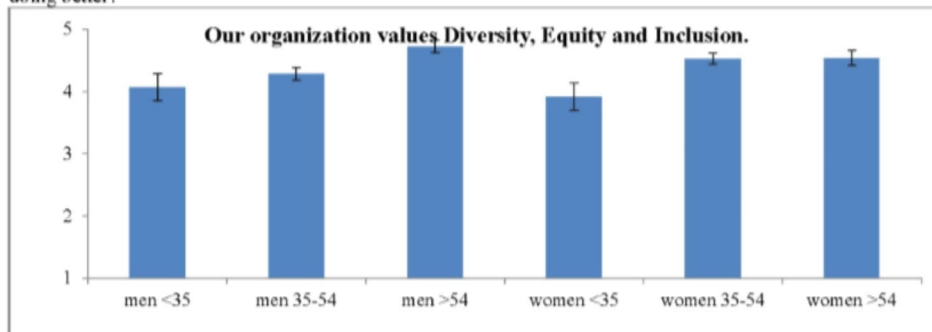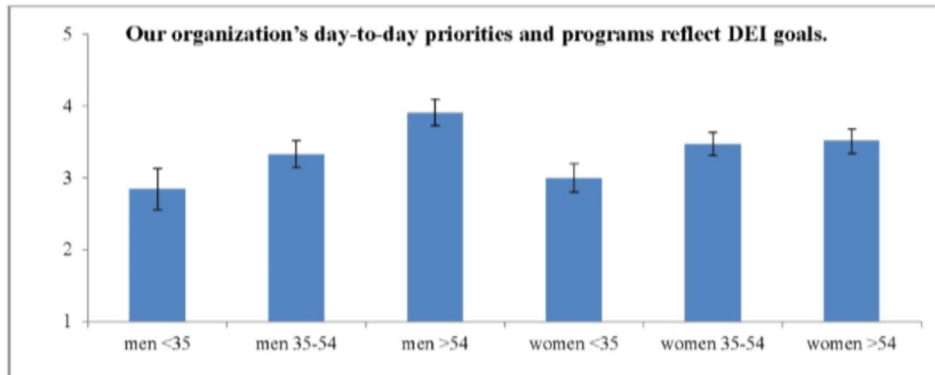

Race/ethnicity
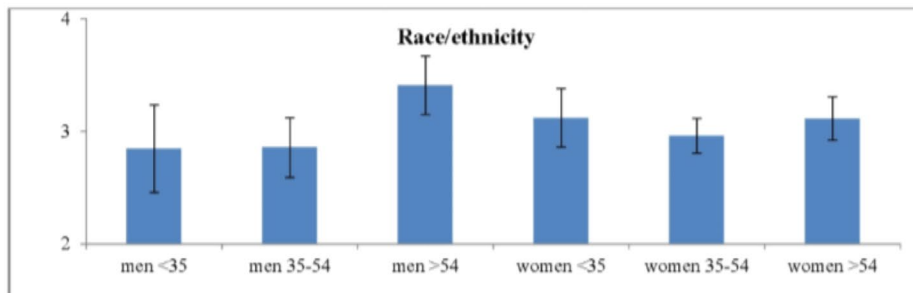
Men also feel their organizations have more people of color on staff than women do. Is this a true statistic? Or a perception?

% of staff who are people of color

Chart with bars for: men <35, men 35-54, men >54, women <35, women 35-54, women >54. Y-axis starts at 0.

Our organization is effective at supporting and retaining staff and/or volunteers from diverse backgrounds.

Chart with bars for: men <35, men 35-54, men >54, women <35, women 35-54, women >54. Y-axis from 2 to 4.

Question: Does gender/age/combination impact whether people feel their org values DEI?

Answer: Older people tend to think their organization values DEI more than young people, but no difference in gender. So are these older people misguided or are they right? Are younger people more sensitive to DEI, so they wish their orgs were doing better? Or are older people more sensitive to DEI, so they think their orgs are doing better?

Our organization values Diversity, Equity and Inclusion.

Chart with bars for: men <35, men 35-54, men >54, women <35, women 35-54, women >54. Y-axis from 1 to 5.

15

59

**Our organization's day-to-day priorities and programs reflect DEI goals.**

60

# Section III: Socioeconomics and Ethnicity

Question: Do POC and Caucasian respondents tend to be evenly distributed across (perceived) income scale?
Answer: A higher proportion of caucasian respondents fall in the upper income levels (44%) versus POCs (28%). A larger proportion of POCs report that they are in the low income bracket (20%) versus caucasian (8%). A similar proportion perceive themselves to be in the middle income bracket (POCs – 52%; caucasian 48%).
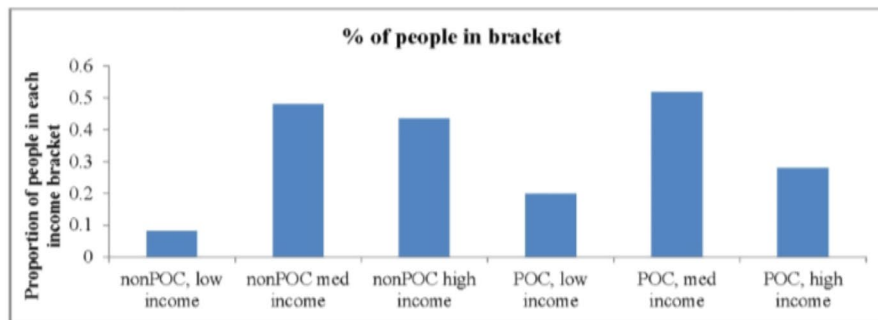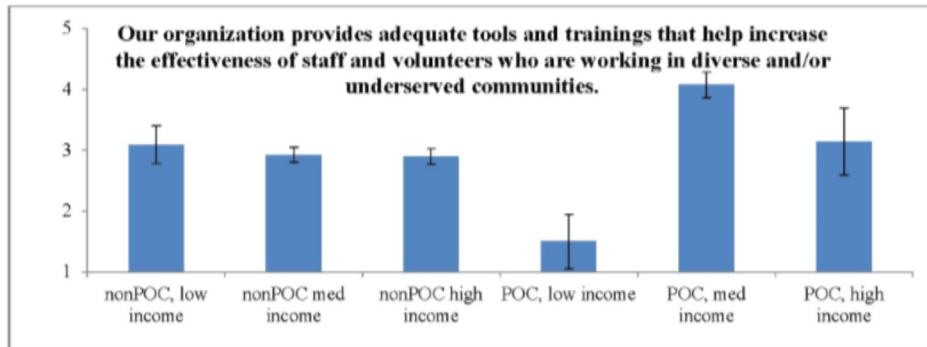

Question: Does socioeconomics/ethnicity/combination affect whether you think DEI practices can improve environment?

Answer: people overwhelming feel they can, but low income POC feel slightly less
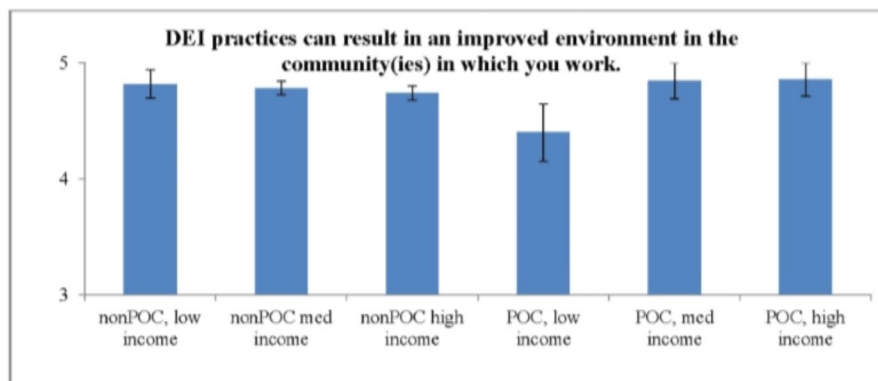
Whether you think your org is providing the right tools depends on both perceived income level and ethnicity. Low income POC feel they need more tools and trainings to work in communities of color. (Though that sample size is low: 5 individuals)

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Our organization provides adequate tools and trainings that help increase the effectiveness of staff and volunteers who are working in diverse and/or underserved communities.

Staff who feel they are in the low income bracket feel more so than higher income staff that perceived disconnect with mission and environmental goals is a challenge to overcome in terms of DEI work:
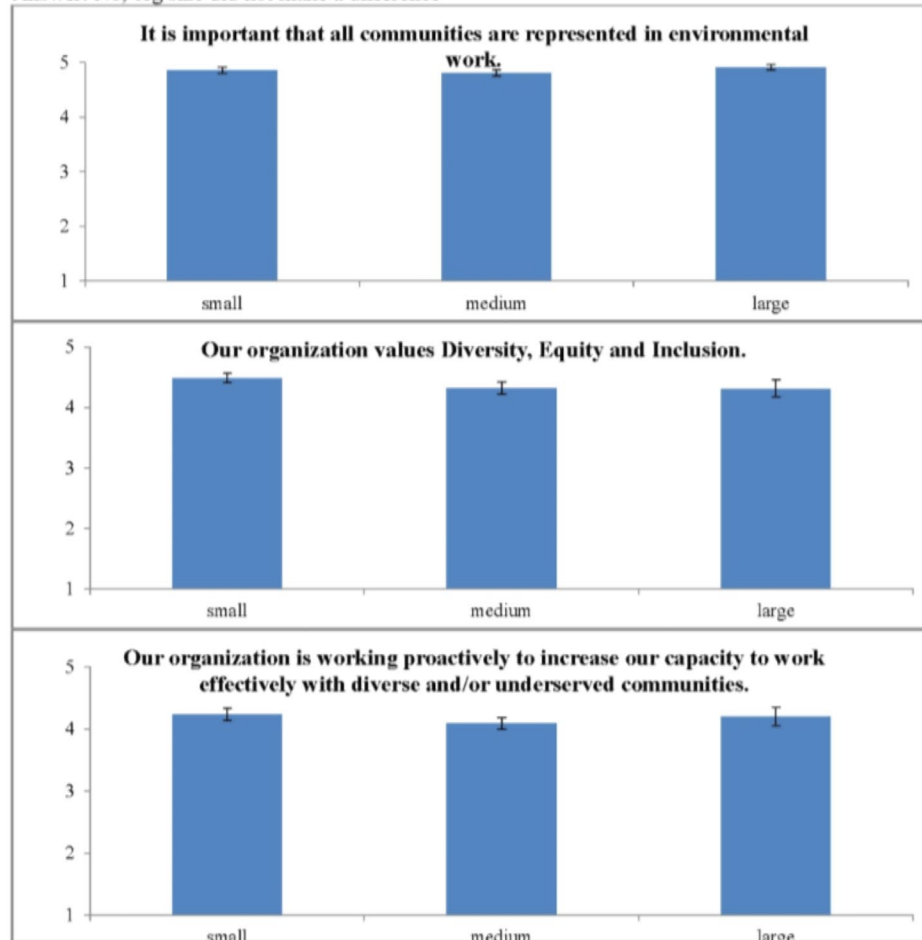
Perceived disconnect with our mission.
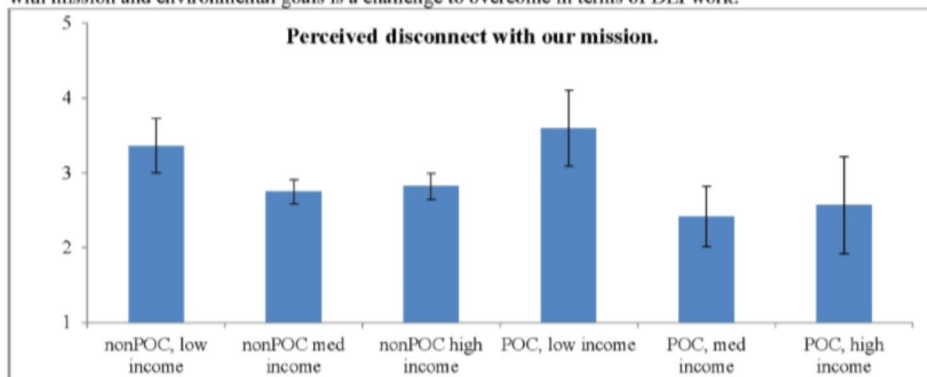
Staff who feel they are low income also feel that their org values DEI less than other groups (though, again, small sample size (n=5))

**Our organization values Diversity, Equity and Inclusion.**

18
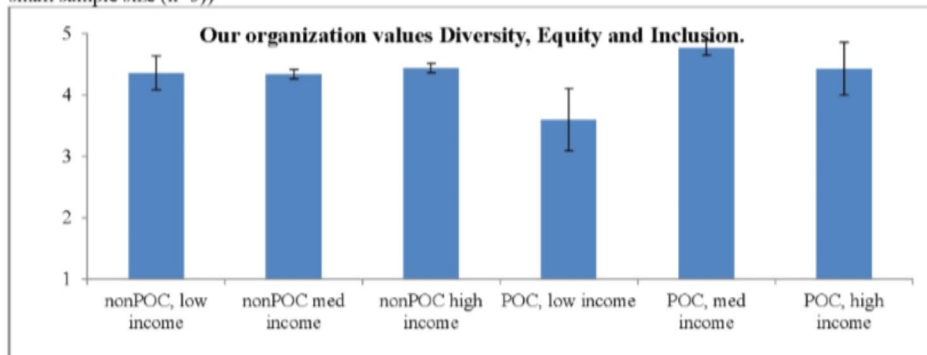
Section IV Organization Size

Do people from different org sizes have different opinions on the value of DEI work?

Answer: No, org size did not make a difference

It is important that all communities are represented in environmental work.

Our organization values Diversity, Equity and Inclusion.

Our organization is working proactively to increase our capacity to work effectively with diverse and/or underserved communities.
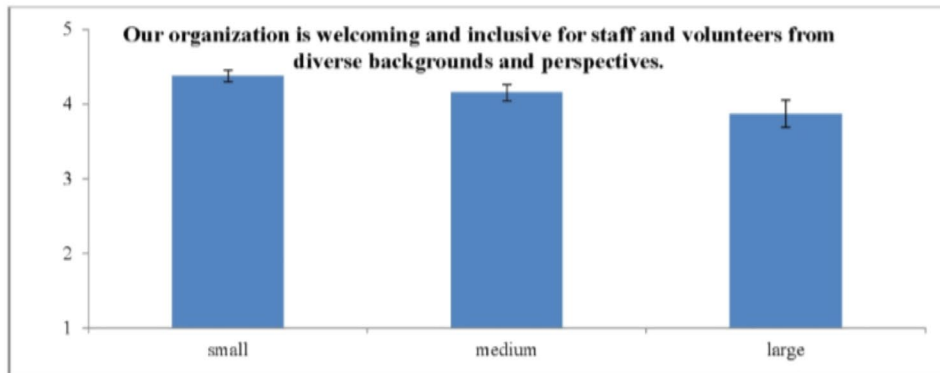

People from larger organizations have a slight tendency to think DEI work can improve environment, but all answers were high (>4)
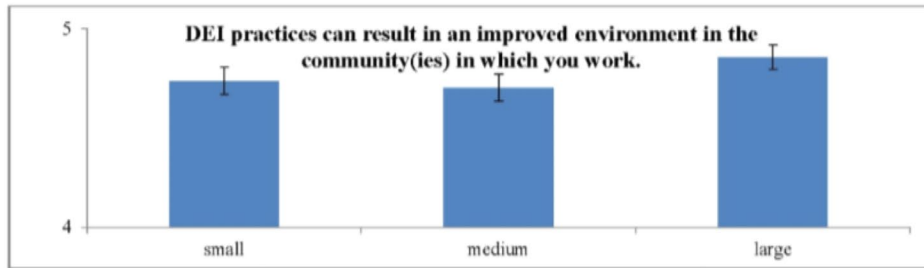
There was a slight trend with org size in individuals feeling that a perceived lack of connection to env goals is a challenge:
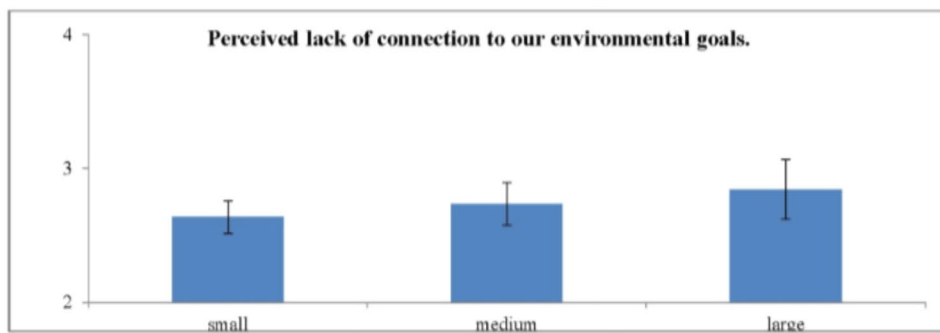
There was a slight trend in feelings of inclusion of diverse staff/vols with org size:
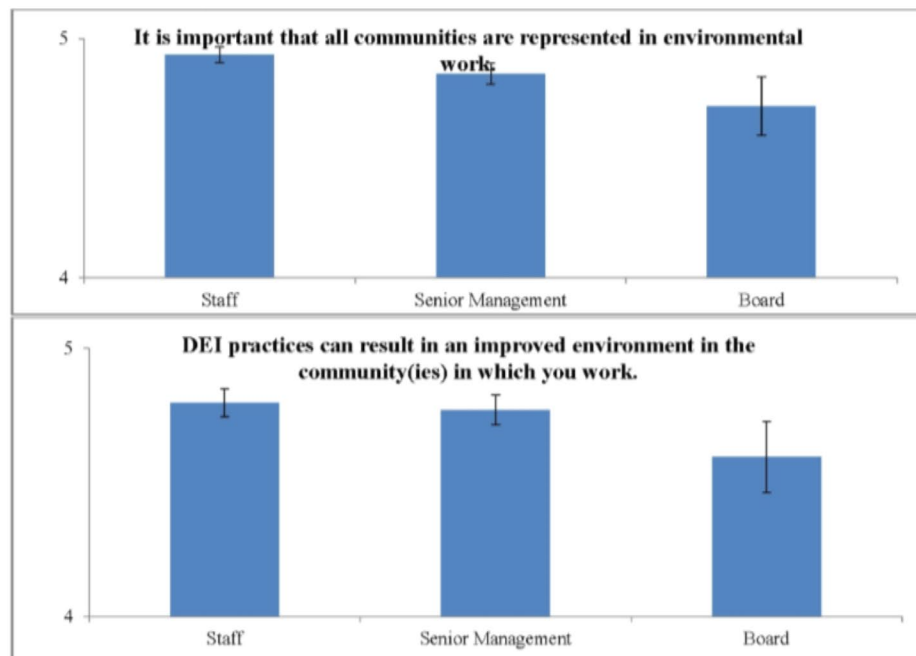

Individuals from larger organizations were more likely to think DEI work would strengthen the ability to advance their mission:

20

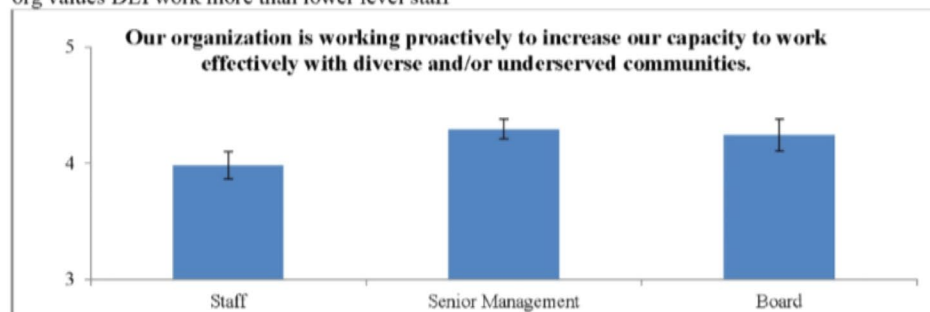Strengthen the ability to advance our mission
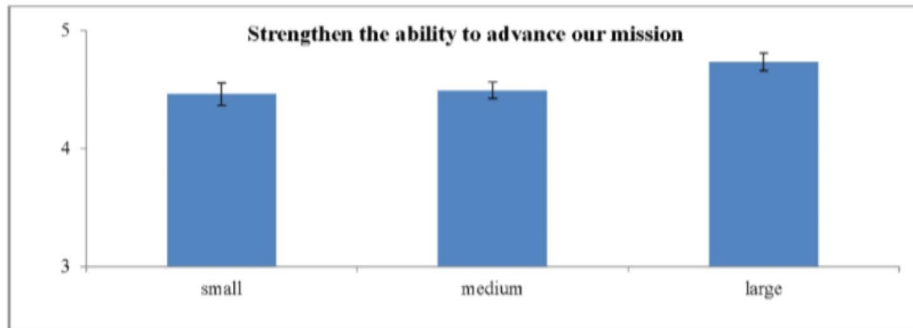
Section V Management Role

Do people at different levels within the organization feel differently about DEI work?

Answer: Lower level staff feel it's more important than more senior levels (though everyone scored it above 4.0);

It is important that all communities are represented in environmental work.

DEI practices can result in an improved environment in the community(ies) in which you work.

However, more senior levels feel they are doing more to increase their capacity and board feels their org values DEI work more than lower level staff

Our organization is working proactively to increase our capacity to work effectively with diverse and/or underserved communities.

Our organization values Diversity, Equity and Inclusion.
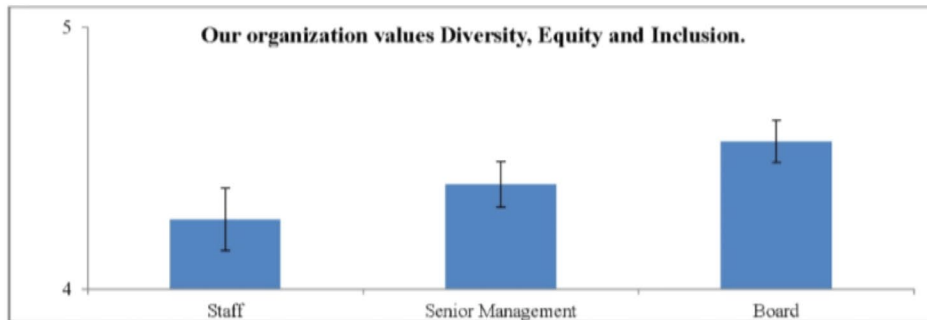
Lower level staff feel perceived connection to environmental goals is more of a challenge to advance DEI work:

Perceived lack of connection to our environmental goals.
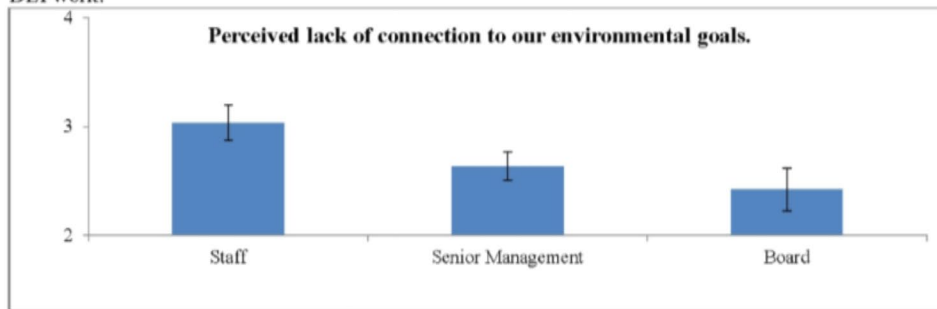
Board feels they are more welcoming to staff/vols from diverse backgrounds than staff do:

Our organization is welcoming and inclusive for staff and volunteers from diverse backgrounds and perspectives.

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Section VI: Organization Issue Area: Environmental Only, or Other Issues as well

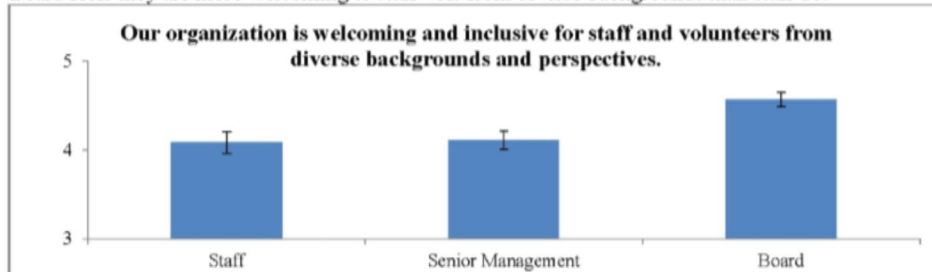Do organizations that focus on broader areas than just environment view DEI differently?

Answer: No. Most answers tend to be the same for individuals associated with orgs that work purely on environment-related issues than on env + other topics.

It is important that all communities are represented in environmental work.

DEI practices can result in an improved environment in the community(ies) in which you work.

Our organization is working proactively to increase our capacity to work effectively with diverse and/or underserved communities.

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Our organization values Diversity, Equity and Inclusion.

Our organization is welcoming and inclusive for staff and volunteers from diverse backgrounds and perspectives.

Organizations who focus on other issues than just environment tend to have more people of color on staff.

% of staff who are people of color
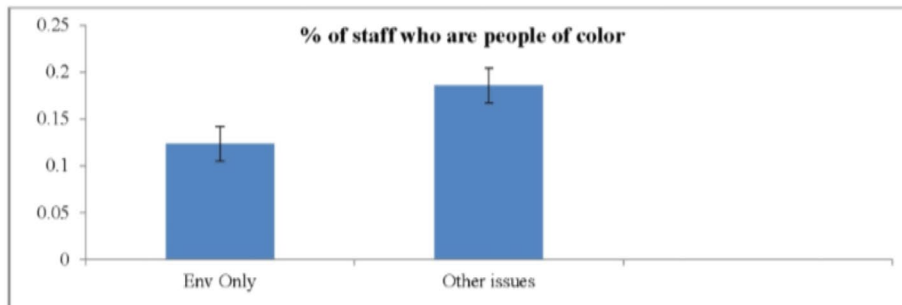
Appendix 6. DEIJ Audit Framework Template

The following audit framework was developed for foundations who fund environmental work, and could be adapted to meet the needs of other organizations.

Diversity, Equity and Inclusion Audit Template

developed by Skeo Solutions

May 2018

For more information: www.skeo.com

Skeo

DEI Audit Scorecard Template

Overview
This DEI Audit Scorecard has been developed as template to help environmental funders advance Diversity, Equity and Inclusion in their work. The scorecard was adapted from several models that have been used to evaluate DEI for foundations, environmental organizations and organizations from other sectors. The scorecard includes 31 actions divided across the following eight objectives:

1. Authorizing Environment
2. Hiring, Promotion and Tenure
3. Contracting and Investing
4. Training and Internal Culture
5. Grantmaking Program Design
6. Funding Priorities
7. Philanthropic Leadership
8. Data Tracking, Analysis and Reporting

Gathering Data for Evaluation
When using the scorecard, evaluators may look to several different sources of information about the organization's policies, practices, data collection and tracking, and outcomes. These sources include, but are not limited to:

- Document review (e.g. policy documents, strategic or organizational plans, grant-making documents, data analysis and reporting)
- Engagement with staff, board members or grantees (e.g., interviews, facilitated group dialogues, surveys)

How to Use the Scorecard
The DEI Audit Scorecard evaluates DEI Actions using the following two scales:

Status (have the actions been taken?)	Assessment (what is the quality of the actions?)
No	1 – Not yet meeting goals
Partially	2 – Achieving goals
Yes	3 – Exceeding goals

An assessment score of 1 represents an area where improvement is needed to achieve DEI goals. An assessment score of 2 represents a positive assessment that the organization is consistently meeting the DEI goals set for that action, though there still may be areas for improvement. An assessment score of 3 represents a practice that stands out as new, innovative and worthy of investing resources in modeling for others in the field. The assessment also includes written findings supporting the scores with recommendations for improvement where needed.

Using this assessment method, it is not necessarily the goal for an organization to aim for a score of 3 in all categories. A score of 2 represents a positive baseline score that indicates the organization is performing well in achieving DEI goals.

Note on the Term "Other Underrepresented Groups"
The groups that an organization prioritizes for expanding representation may be dependent on the relevant grant-making field and may also shift and change over time as a field evolves. The term "other underrepresented groups" is used throughout the scorecard to give the actions in this scorecard relevance to foundations who work in a variety of fields as well as flexibility over time as a foundation's priorities evolve in response to changes in the field.

DEI Audit Scorecard

Objectives and Actions	Status			Assessment			Findings and Recommendations
	N	P	Y	1	2	3	
Objective 1. Authorizing Environment							
1.1 Adopt and disseminate a clear DEI statement or policy.							
1.2 Adopt an organizational DEI Plan and assess progress on the plan.							
1.3 Include DEI measures in the performance goals for the CEO and other senior and mid-level managers.							
1.4 Create a Board-level Diversity or DEI Committee or equivalent							
Objective 2. Hiring, Promotion and Tenure							
2.1 Adopt personnel policies and procedures to promote DEI in hiring, promotion and tenure.							
2.2 Conduct proactive outreach and recruitment to increase representation of people of color and other underrepresented groups across board, management, staff and intern positions.							
2.3 Include people of color and other underrepresented groups in hiring and promotion committees.							
2.4 Seek opportunities to provide professional development, promote and retain people of color and other underrepresented groups across board, management, staff and intern positions.							
Objective 3. Contracting and Investing							
3.1 Adopt policies and practices that promote DEI in contracting and consulting.							
3.2 Adopt practices to ensure socially responsible investments and DEI best practices among investment managers.							
Objective 4. Training and Internal Culture							
4.1 Conduct staff and board training on DEI and racial equity issues.							
4.2 Ensure staff and board support the DEI policy as integral to achieving the mission of the organization.							
4.3 Regularly include DEI considerations in daily operations and decision-making at the staff and board levels.							
4.4 Ensure board, management and staff have the skills and tools needed to advance DEI.							
Objective 5. Grantmaking Program Design							
5.1 Seek input from external audiences on the value and implementation of DEI in grant-making.							

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Objectives and Actions	Status			Assessment			Findings and Recommendations
	N	P	Y	1	2	3	
5.2 Develop DEI criteria to be used in grant evaluation and targets.							
5.3 Explicitly include DEI criteria in grant evaluation and targets.							
5.4 Provide outreach and grant-management training to organizations run by and primarily serving communities of color and/or other underrepresented communities.							
5.5 Ensure grant review committees include people of color and other underrepresented groups.							
Objective 6. Funding Outcomes							
6.1 Promote non-discriminatory policies among applicant/grantee organizations.							
6.2 Fund organizations that engage people of color or other underrepresented groups.							
6.3 Fund organizations led or staffed by people of color or other underrepresented groups.							
6.4 Incentivize and/or require organizations to increase DEI in their organizational practices.							
6.5 Incentivize projects that align environmental investments with community needs.							
Objective 7. Philanthropic Leadership							
7.1 Ensure communication materials are culturally accessible; promote DEI goals and reflect people of color and other underrepresented groups.							
7.2 Collaborate with philanthropy peers to develop and implement standardized DEI indicators for applicant/grantee organizations.							
7.3 Evaluate and disseminate best practices regarding increasing DEI in environmental philanthropy, and support adoption of best practices by peer foundations.							
Objective 8. Data Tracking, Analysis and Reporting							
8.1 Track, analyze and report on the diversity of the board (and other appointed advisory groups as relevant), management, staff and interns.							
8.2 Track, analyze and report on the diversity of contractors and consultants.							
8.3 Track, analyze and report on engagement of people of color or other underrepresented groups through funded projects.							
8.4 Track, analyze and report on investments in organizations led or staffed by people of color or other underrepresented groups through funded projects.							

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