

Inclusion Assessment Proposal: DO NOT COPY, DO NOT DISTRIBUTE

The following is a proposal from a past client with client's information removed. This document serves as a representation of services IPS can provide. However, each project is designed with the unique needs and capacity of the client in mind. This sample is for a comprehensive assessment. Keep in mind such an assessment may not fit the needs of your organization. The purpose of this document is to provide you with a sense of our methodology, framework, and approach.



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Executive Summary

To create a work and service environment that is inclusive and diverse, some institutions have relied on demonstrating their efforts and commitment through high profile activities and/or targeted recruitment of underrepresented minorities. It has become evident that even though these efforts provide some significant increases in the diversity of their clientele and staff, they are usually not enough to overcome common organizational barriers to inclusion.

These barriers affect how staff members work together and how the client population is served. An organizational culture change is required to achieve an inclusive environment so that valuable, diverse perspectives and knowledge can be fully integrated into the organization's framework. To accomplish this, a diversity and inclusion lens must be developed to identify systemic gaps, opportunities for growth, and influence Company A's decision making process.

Company A understands that in order to ensure all individuals of different backgrounds feel valued and appreciated, they will need to cultivate an environment that demonstrates the value proposition that diversity, inclusion, and cultural competence lends to enhancing organizational performance.

This can only be achieved by first assessing Company A's capacity to achieve the desired state it is seeking. It is recommended that Company A utilize the services of Inclusive Performance Strategies (IPS) to conduct a multi-faceted assessment that will provide a snap-shot of Company A's current efforts towards inclusion.

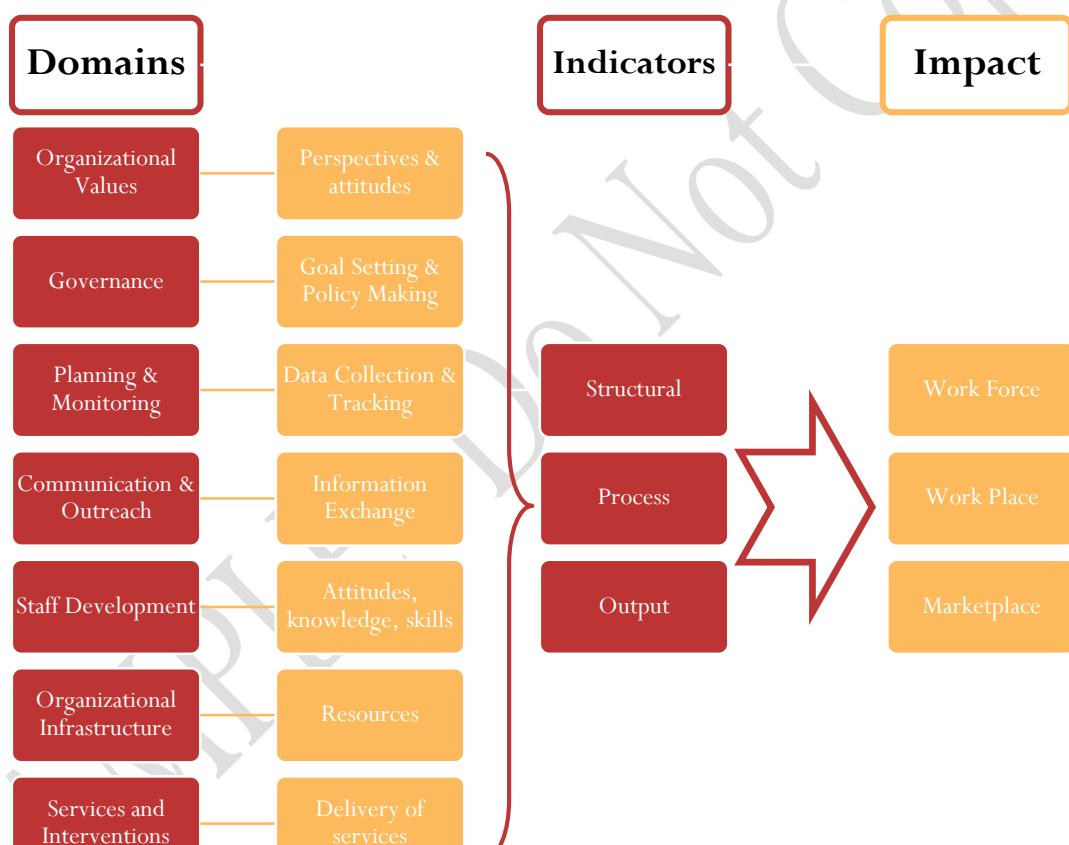
Utilizing a mixed method approach, the assessment will collect quantitative and qualitative data from stakeholders to gauge their perception of Company A's capacity to provide and manage an inclusive environment. Participants will include staff, board members, volunteers, and community stakeholders. This targeted collection of data will set the stage for strategic planning to develop a diversity and inclusion lens into all of Company A's key function areas, both internally and as they pertain to Company A's goals to engage underserved communities in advocating for and participating in thriving neighborhoods.

Company A has requested the assistance of Inclusive Performance Strategies to conduct an assessment of the current organizational state of inclusion that will inform a strategic framework for inclusive internal operations as well as community initiatives that will engage underserved neighborhoods in advocating for and participating in thriving communities.

Scope, Approach, and Methodology

Scope

To provide structure for the assessment Inclusive Performance Strategies will utilize seven organizational domains as ‘categories in which to ensure organizational inclusion’. Diversity, inclusion, and cultural competence should manifest clearly in each of these domains, which are foundational to any organization. The graphic below presents these domains, which also provide performance indicators to measure the level of impact on an organization’s ability to achieve and sustain an inclusive environment. The result is the development of specific metrics that measure an organization’s capacity for inclusion from a structural, process, and output framework.



Approach

IPS will initiate engagement by facilitating a session with the Company A Board to clarify intentions, expectations, and identify key drivers that will influence the outputs of our work. Based on this session, an **Assessment Implementation Plan** will be developed outlining key actions steps to assess the organization's capacity to achieve its desired state of diversity and inclusion.

As a functional framework, IPS will employ our exclusive **D5 Strategic Development Methodology™ (D5™)** which enhances the effectiveness and flexibility of our assessment approach. The methodology can be customized to work within any existing organizational structure while leveraging existing internal resources. We will engage Company A through an **Appreciative Inquiry (AI™)** approach that respects existing assets and strengths. The goal will be to capture pertinent information that will be utilized in the development of a strategic blueprint toward diversity and inclusion for Company A. The following provides an overview of the **D5™** and components of each phase. While the scope of this project extends through Phase 4, it is highly recommended to continue work through Phase 5.

Methodology

Phase 1: DEFINING & DESIGNING

Metrics: Work collaboratively to define metrics, measures for success, data collection, analysis, and reporting.

Collaboration: Serve as facilitators and mentors throughout assessment activities. Support the development of Company A key personnel to foster the progress of diversity and inclusion efforts within the organization.

Communication: Paramount and preliminary to the work is the context, sincerity, and transparency of a communication plan that expresses the value of this change initiative to Company A as it strives to achieve its goal of providing an inclusive environment for all people it serves. Communication must assure confidentiality, address and manage perceptions about the intent of the assessment, and ensure the meaningful use of the findings and recommendations.

Phase 2: DATA GATHERING

Document Audit: Review and assess all existing materials related to procedures, policies and practices that would support inclusion directly or indirectly.

Cultural Snapshot: Assess the existing organization's culture via focus groups, key interviews, and surveys to create a baseline of data that provides the "voice of the customer" through the construct of various stakeholder perceptions. Individual inventories will be developed to capture the perception of stakeholders concerning diversity, cultural competence, and racial equity issues, as well as Company A's

capacity for change. Opportunities for growth will be identified at all levels to support equitable accountability for inclusion across all stakeholders.

Phase 3: DATA REVIEW & ANALYSIS

Projected Desired State: Utilize defined performance indicators of the desired state through long range objectives and requirements of Company A to create an effective, inclusive learning and working environment.

Findings and Insights: Analysis of demographics vis-à-vis responses, perceptions, and the ‘voice of the customer’.

Phase 4: DEVELOP REPORT OVERVIEWS

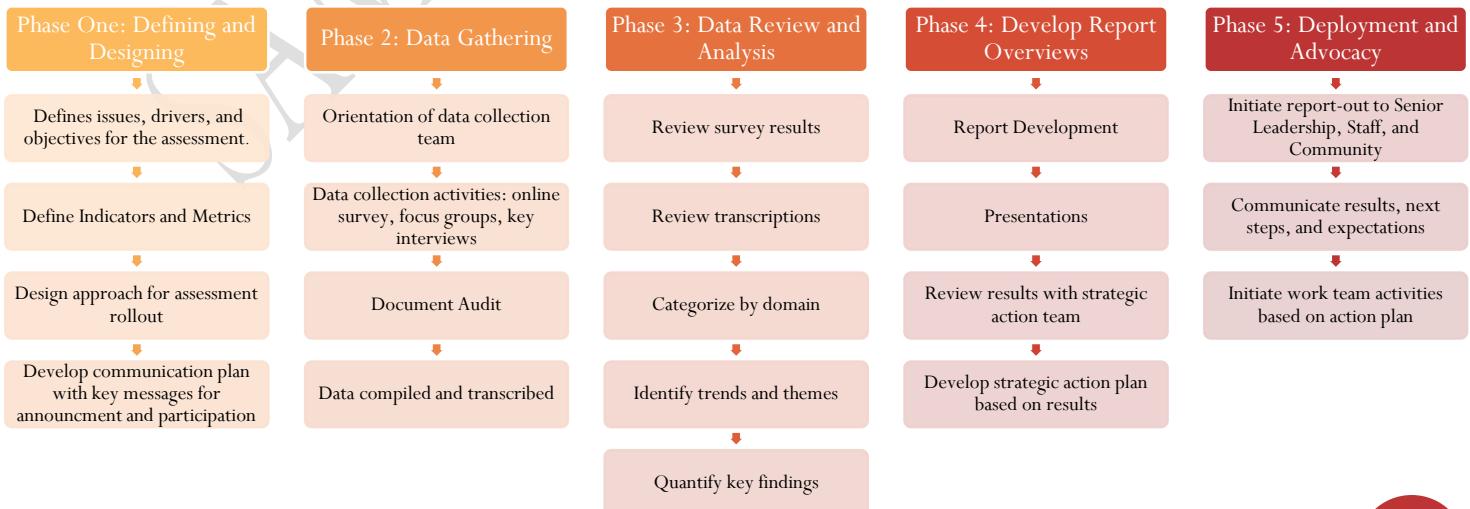
Recommendations: Initial findings and recommendations will be presented Company A’s staff and board.

Strategic Planning: Inclusive Performance Strategies will work with a strategic action team of Company A’s staff, board, and community stakeholders to develop an initial action plan based on results of the assessment

Phase 5: DEPLOYMENT AND ADVOCACY

Initiate Work Team: Inclusive Performance Strategies will assist Company A in implementing the action plan towards increased organizational performance both internally and externally, maintaining accountability to the opportunities for growth related to the metrics of the assessment. Specific emphasis will be placed on those domains which will enhance Company A’s ability to address their goal of increasing participation from underserved neighborhoods in advocacy for and participation in thriving neighborhoods.

Below is a graphic representation of the D5 Methodology. Issues or activities that could influence the assessment timeline will be identified during the Defining and Designing phase of work.



Deliverables

Inclusive Performance Strategies will provide a comprehensive report of the assessment findings. The report will include an overview and explanation of the methodology, a detailed report out of inquiry used in data collection, the results and trends of assessment data broken down by organizational domain, summaries of trends and initial recommendations for each domain, and appendixes with transcribed results from surveys, focus groups, and key interviews organized by domain. In addition, Inclusive Performance Strategies will present this report to Company A's board and staff. In addition, IPS will create communication materials outlining key trends and initial first steps that can be used in internal and external communications.

Project Management Approach

Leadership Paradigm for Community Based Projects

It is our vision to offer organizations strategic guidance to build and maintain systems change that supports their ability to meet their mission in a rapidly changing global environment. The demands to understand new cultures, values, and behaviors are increasing dramatically as the workplace and marketplace become increasingly diverse. Employing a measurable methodology, we help organizations create a strategic framework designed to successfully meet human dimension challenges through an *intentional relationship building* approach.

We believe, through collaborative engagements and the development of intentional relationships of trust, a transformational organizational culture can evolve and positively impact the community it serves

Our working philosophy is to embrace an entity's existing objectives while instilling cultural change into the fabric of an organization from grassroots to grass tops. We establish a baseline to measure growth from current state to desired state through the long-term infusion of culturally competent criteria. Assessing the current state of Friends of Grand Rapids Parks and identifying key value propositions will allow connections to be created that strategically link culture change objectives to the organization's dashboard.

Diversity and Inclusion Lens

Our approach to accomplish this goal utilizes a flexible methodology that will embrace the existing organizational culture and begin with dialogue and a strategic planning process that focuses on building a diversity and inclusion framework.

To establish clear objectives, it is important to understand the definitive relationship of inclusion, diversity, and cultural competence, which have been interchanged frequently when discussing the ability to embrace

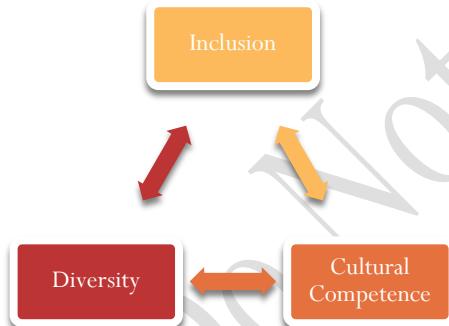
difference. Below are some basic definitions to provide a fundamental understanding of these concepts. The diagram is also presented to provide clarity to the inter-reliance of the three concepts.

Diversity: refers to the unique characteristics we all possess that distinguish us as individuals and identify us as belonging to a group or groups.

Cultural Competence: the attitude, knowledge, and behavior required to interact with individuals from different cultural, ethnic, religious, and socioeconomic backgrounds.

Inclusion: an organizational behavior where all individuals feel valued; their diverse backgrounds are embraced and respected.

The Relationship of Diversity, Inclusion and Cultural Competence



“Inclusion is an organizational behavior that embraces the diversity we all possess, while supporting our ability (cultural competence) to cross-culturally interact.” (Paul Doyle)

The aforementioned relationship between diversity, inclusion, and cultural competence demands an entirely deeper level of understanding in order for it to manifest within an organization’s fabric. This will avoid the historic “diversity in a box” approach that positions the organization in a reactive mode versus a proactive mode when implementing its efforts toward diversity and inclusion. Company A is uniquely positioned to take an intentional approach, and **Inclusive Performance Strategies** is equipped to support Company A in doing just that.

Client Engagement and Correspondence

Below are estimated resource requirements from Friends of Grand Rapids Parks to successfully complete the development of an inclusion framework within a specific timeline to be agreed upon by IPS and Company A . The majority of Company A's responsibility will center on the following activities:

- Internal communications
- Support team orientation and development
- Support of focus group and key interview scheduling
- Support in sharing online survey with Company A stakeholders
- Data collection support (Document and Program Audit)

It is recommended that a designated Assessment Coordinator be identified by Company A to serve as a liaison with the IPS team.

ENGAGING FRIENDS OF GRAND RAPID'S PARKS' STAFF, BOARD, VOLUNTEERS, AND COMMUNITY STAKEHOLDERS

1. Based on prior experience, key requirements include confidentiality and the opportunity to 'be heard'. This is accomplished with the completion of key stakeholder interviews (anonymous and confidential) and focus groups.
2. A communication template will be developed explaining the purpose and meaningful use of the gathered data, findings, and subsequent recommendations. Participants will be assured of confidentiality, timeliness, and the objectiveness of the focus group facilitators.
3. Follow-up communication is recommended to deliver the message back to all participants that their voices have been heard and their input will be of value to Company A efforts to move forward.
4. Inclusive Performance Strategies plans to engage in the following ways:
 - a. Key interviews with at least 5 and up to all 11 board members. Interviews can be conducted in person or over the phone and will last approximately 30 minutes.
 - b. Deploy an online survey to Company A stakeholders and the general community through Company A's mailing lists, IPS and Company A and IPS social media, etc.
 - c. One hour-long focus group with Company A staff.
 - d. One hour-long focus group with Company A volunteers, specifically targeting volunteers from both _____ & _____ programs.
 - e. Two hour-long focus groups with community stakeholders from Company A target neighborhoods, with an emphasis on recruiting participants from currently underserved communities.

Estimated Budget

Appendix A: Project Team Staffing

Paul T. Doyle

Paul T. Doyle, principal, applies over 30 years of management experience to help organizations embrace change and develop inclusive work and service environments. By understanding how to embrace the cultures, values and behaviors of a diverse workforce, Paul helps organizations maintain the competitive edge needed for success in today's rapidly changing global economic market.

Combining his experience and knowledge of organizational analysis and transformation, Paul utilizes a customizable methodology to provide organizations with a measurable strategic framework that will boost their innovative growth, inclusion and quality. A key to his success is creating platforms of trust through intentional relationship building—allowing diversity of thought to be achieved and appreciated.



Paul holds a degree in Education from Ferris State University, from which he also received the honor of a Distinguished Alumni Award. He has completed the Executive Leadership Institute at the University of Michigan Ross School of Business and graduate work at the Western Michigan University School of Educational Leadership with a concentration in organizational analysis. Paul is a recipient of the United Way's Project Blue Print Diversity Leadership Award, Grand Rapids "GIANTS" Leadership Award for Community Health and the Legacy Award for Legislative Leadership. He teaches as Adjunct Faculty at Michigan State University's College of Human Medicine and also serves on several boards and committees to improve the quality of life for all individuals within his community through inclusion.

Paul was born in the housing projects of Brooklyn, New York, the youngest of five children and the first to graduate from high school. His drive to be a positive impact in the lives of others and community is rooted in that phase of his life journey.

Danielle Veldman

Associate Consultant Danielle Veldman's passion for community equity and inclusion from grassroots to grass tops has fueled her work experience for the last 6 years. Her engagement within under-served African American, Hispanic, and immigrant communities has provided her the knowledge to identify and understand the root causes for existing disparities and develop program models that support systemic change through inclusion.

Before joining IPS, Danielle served as Fund Development Coordinator for Baxter Community Center in Grand Rapids, Michigan. During her time at Baxter she was responsible for grants management, donor relations, and community outreach. She also worked to create results based accountability plans and marketing and communication strategies. One of her key achievements was the development of an urban agriculture program to address existing food and health disparities within underserved communities of color. This innovative and sustainable program has served hundreds of community members over the last 3 years.

Inclusion is needed to promote productive and thriving communities, whether they be whole cities or the organizational communities of nonprofits and businesses. Danielle understands through firsthand experience that inclusive environments foster innovation, creativity, teamwork, ownership, and effective change. She now utilizes her experience and skills to enhance inclusive performance with organizations across community sectors.

Danielle graduated from Calvin College with her B.A. in International Development and Sociology. She has completed professional development courses in results based accountability, grant writing, evaluation, program management, and racial reconciliation. In her spare time she serves on the Board of Feeding America of West Michigan, is a volunteer mentor in Baxter Community Center's Mizizi Maji Mentoring program, an active participant in Congregations Organizing for Racial Reconciliation, and co-chair of New City Fellowship's Multicultural Accessibility Committee.



Appendix B: Company Overview

Inclusive Performance Strategies: Progressive Improvement-Sustainable Results

Inclusive Performance Strategies strives to provide your organization with a customized plan that will promote systemic change to help you move forward. Each organization presents unique issues and barriers that limit their ability to embrace inclusive performance; we intentionally identify them to better equip staff and improve overall performance. Whether you are just starting the journey or you have already made progress, we can step in at any stage to help.

Inclusive Performance Strategies has engaged collective impact communities, individual businesses, nonprofits, higher education institutions, and governmental institutions, including Sutter Health, Spectrum Health, Princeton University, Michigan State University, Grand Rapids Opportunities for Women, and the Urban Core Collective.

Person authorized to contractually bind organization:

Paul Doyle

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