ORGANIZATIONAL ASSESSMENT

This organizational self-assessment activity was designed to assist human service organizations develop a snapshot of their current performance in serving LGBTQ people and communities. The self-assessment process provides for an examination of organizational policy and practice based on ten key areas of operation. While the tool itself is extensive, it is not intended to be comprehensive. Instead, we encourage organizations to use this tool as one strategy in building capacity to increase LGBTQ access.

The organizational self-assessment is designed as a team activity to bring various perspectives into conversation about organizational performance. Each section includes both open ended framing questions and performance indicators.

GETTING STARTED: TEAM-BUILDING

GAIN AUTHORIZATION from the organization's leadership about starting a self-assessment process. Clarify the scope of authorization to bring together staff and to develop recommendations for change.

INVITE A TEAM who will bring diverse perspectives to the assessment process. The team should include representation from direct services workers and management of various departments. You may also include board members, volunteers, clients, collaborative partnership and/or other stakeholders.

SCHEDULE A SEQUENCE OF MEETINGS to complete the assessment. It is recommended to schedule at least three 90-minute meetings. The facilitator should familiarize themselves with the assessment tool before the first meeting. Ideally, team participants should not review the tool in advance.

SELF-ASSESSMENT: The facilitator should help set intentions and guidelines that will encourage members to participate openly. The facilitator leads by reading the indicator prompts offered in the assessment and encourages the team toward dialogue about the organization's performance.

DOCUMENT DISCUSSIONS and capture ideas generated in the process. Be sure to follow up with participants on next steps. Ultimately, the assessment form itself is far less important than the conversations it sparks and the actions it aims to inspire.

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HOW IT WORKS

The Organizational Self-Assessment is divided into ten related areas of organizational operations: built environment, human resources, workplace climate, volunteer programs, professional development, intake & referral, services & programs, collaboration & outreach, development & communications, and mission & values.

Performance Indicators are specific areas related to LGBTQ access. For each indicator, you will be prompted to rate the current effectiveness of your organization on the following scale:

HIGHLY EFFECTIVE
EFFECTIVE
NOT EFFECTIVE
HAVE NOT TAKEN ACTION

N/A (not applicable) is an alternative response when the organization *does not* perform on a particular indicator (i.e. we do not have a Board of Directors, we do not have a reception area, etc.). For items where your organization does perform, but is currently not taking action mark "HAVE NOT TAKEN ACTION."

Framing questions are designed to dig deeper into unique strengths and opportunities that might not be reflected in the standard performance measures.

TIPS FOR THE TEAM:

Encourage Candid Responses: Differing viewpoints and experiences are a strength to developing a dynamic and realistic "snapshot" of the organization at this moment in time. Attempt to become an observer to the organization, rather than an opinion leader, champion, or critic. Stay in the present, while acknowledging where organizational history may be shaping current policies and practices.

Deepen Commitments: This tool is best use as a companion to or complimentary with assessments related improving services for underserved groups (language access, disability, anti-racism, etc.). The terms "equity & social justice" are used throughout this document to refer broadly to strategies that an organization may use to retain a diverse workforce and improve access to services for underserved communities. Where these terms appear, organizations may choose to replace them with the terminology used at the organization (e.g. diversity, humility, etc.).

Document Strengths: Organizations often find that they are performing more effectively in some areas than in others. If the organization is highly effective in a specific area, take note of that success. For example, if your organization is HIGHLY EFFECTIVE in recruiting and retaining LGBTQ staff, write down some of the strategies that make the organization effective (e.g. we advertise job openings in LGBTQ media, open positions are circulated by current & former employees which leads to word of mouth referrals"). Documenting strengths may inform strategies for other areas and help the organization recognize and sustain successful practices.

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FOR FACILITATORS

- Set up conditions for a successful meeting. Welcome everyone, lead introductions, acknowledge time parameters.

- Identify a note taker and provide them with instructions and the team's copy of the organizational self-assessment.

- Explain the purpose and process for the organizational self-assessment to the team and go over the general schedule of meetings.

- Provide an overview of the 10 thematic areas of the assessment.

- Move the group into the first list of indicator questions. Ensure that everyone participating understands the question before it is discussed. First consider whether the question is applicable to your organization. If applicable, discuss briefly before moving the group to a rating. If consensus cannot be met, move onto the next question.

- For large organizations or organizations with multiple sites and programs, there may be substantially different ratings for different programs. You may choose to mark multiple boxes and indicate the programs associated with each.

- Following the indicators you will find a set of framing question. Invite the group to consider if improvements could be made to any of the indicators, as well as other areas that were not addressed.

- Keep the team on track to the thematic area you are working on. Set the amount of time you will spend on each sections.

Thank all the participants and let them know the next steps!

FOR NOTE TAKERS

- Log each date your team worked together, the start and end time, and a roster of team members present.

- On each indicator, register ratings as decided by the group.

- Make a **?** next to any question that is confusing or unclear to the group

- Take notes during the discussion, including identified strengths, gaps, and barriers.

- Take note of any areas where the team needs additional information or training or technical assistance.

- Document any issues you think may be relevant to your team's experience completing the Organizational Self-Assessment.

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BUILT ENVIRONMENT

	Highly Effective	Effective	Not Effective	Has not taken action	Does Not Apply
Facilities and offices are accessible by public transportation.					
The organization has a plan to support access for people with disabilities and/or people who have experienced trauma.					
The organization visually communicates that racially diverse LGBTQ people are welcome in its facilities (artwork, magazines, posters).					
The organization visually communicates its equity and social justice values in its facilities (artwork, magazines, posters).					
The organization does not use unnecessary surveillance equipment to monitor clients.					
The reception area is configured to best ensure client privacy in completing documents and forms that may reveal personal information.					
All gender restrooms are available for staff & clients in all agency buildings					
Organizational policy ensures that all gender restrooms are made available at off-site events and programming.					
Residential facilities can house people of all genders					

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FRAMING QUESTIONS

How is a commitment to LGBTQ access reflected in the organization's facilities and physical spaces?
What are some of the physical, spatial, or geographic barriers to LGBTQ access that the organization might be able to address in the short-term? In long-term planning?

HUMAN RESOURCES

	Highly Effective	Effective	Not Effective	Has not taken act ion	Does Not Apply
The organization is committed to workforce diversity and equity across all levels of the organization					
The organization's lowest paid workers earn a livable wage based on local cost of living					
Job announcements explicitly encourage LGBTQ candidates to apply					
Job candidates are screened for potential bias or training needs working with underserved communities, including LGBTQ people					
The organization's anti-discrimination policies & protocols include protections based on sexual orientation, gender identity and expression, family status, _and_ experience as a survivor of violence.					
The organization maintains grievance procedures for complaints about discrimination.					
Employee benefits are equitable for unmarried domestic partners and children in employee's care (regardless of legal status)					
Healthcare insurance policies do not exclude transgender related health					
The organization has a standard procedure for name changes on employment-related document					
The organization has a written policy ensuring staff can use a preferred name at work					

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FRAMING QUESTIONS

Do organizational human resource practices and workplace climate support the hiring and retention of diverse LGBTQ employees?

How do you know if the workplace is inclusive and affirming for LGBTQ employees?

How might the organization better promote LGBTQ access and equity through its employment practices?

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WORKPLACE CLIMATE

	Highly Effective	Effective	Not Effective	Has not taken action	Does Not Apply
All new staff receive information about the organization's commitment to workplace equity & social justice including LGBTQ access					
A person or committee is designated to lead workplace equity efforts					
Workplace equity efforts explicitly incorporate LGBTQ equity					
Staff at all levels are able to participate in equity efforts (e.g. trainings, task forces, events, etc.) as part of their job description					
Leadership* participates in workplace equity efforts					
Events and social activities (recreational, celebrations, fundraisers, etc.) engage and appeal to the diversity of staff and volunteers that presently at the organization.					
Events and social activities are equitably attended by LGBTQ families					
There is an active LGBTQ affinity group or network for staff, volunteers and board					
The workplace climate is affirming for LGBTQ staff					

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FRAMING QUESTIONS

Is the organization's workplace culture welcoming and affirming of LGBTQ staff and volunteers?

Are LGBTQ staff, volunteers, and Board of Directors (if applicable) connected to each other?

Are staff or organizational social events engaging the diversity of staff at your organization, including LGBTQ staff?

Does your organization solicit feedback from staff about equity concerns or workplace climate?

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VOLUNTEER PROGRAMS

	Highly Effective	Effective	Not Effective	Has not taken action	Does Not Apply
The organization maintains a diverse pool of volunteers, including LGBTQ volunteers					
New volunteers receive notice of non-discrimination policies and information on workplace equity policies and practices					
Volunteers are provided with educational materials related to LGBTQ access					
Volunteers working directly with clients receive an orientation and/or training related to LGBTQ access					
All volunteers receive an orientation and/or training related to the organization's values and commitments, which includes LGBTQ access					
Volunteer are screened for gaps in training and/or experience, including gaps related to working with LGBTQ people					
Volunteer program supervisors are equipped to respond to volunteers who express bias or discriminate against LGBTQ clients or staff					
Volunteers are invited to join the LGBTQ access team or related capacity building projects					

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FRAMING QUESTIONS

Does the organization's volunteer program attract diverse LGBTQ volunteers? Why and why not?

Does the organization's prepare its volunteers to hold the organization's commitment to LGBTQ access?

How does the organization communication its values to volunteers?

How might the organization advance the skills of all volunteers in supporting the organization's commitments to LGBTQ access?

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PROFESSIONAL DEVELOPMENT

	Highly Effective	Effective	Not Effective	Has not taken action	Does Not Apply
There is a minimum orientation and/or training requirement for all new staff that includes information on LGBTQ access					
A comprehensive training is offered to all new staff that includes information on overcoming barriers to services/programs for LGBTQ communities					
Staff are expressly encouraged to attend ongoing professional development opportunities (trainings, webinars, events), including those related to LGBTQ issues					
A staff member or committee is designated to update LGBTQ resources, educational materials, and literature available to staff					
The organization has designated an LGBTQ expert or consultant (internal/external) available for staff consultation and advisement					
The organization prepares staff to talk to clients/participants about:					
sexual orientation, sexual identity, or sexuality _and_ gender identity and expression					
diverse families or relationships structures					
intimate partner violence and abuse, including in LGBTQ relationships					
sexual violence and trauma					
other forms of violence and trauma (family violence, police violence, bias-motivated)					
legal protections for LGBTQ people (employment, housing, school, family law, incarceration)					

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FRAMING QUESTIONS

How does organization prepare its staff to reduce barriers facing LGBTQ survivors?

What are some strategies the organization might use to create a culture of learning and constructive feedback in serving LGBTQ individuals & communities?

What else does your organization need to ensure its staff can best advocate and support LGBTQ survivors?

INTAKE & REFERRAL

	Highly Effective	Effective	Not Effective	Has not taken action	Does Not Apply
The organization explicitly states that LGBTQ people & families are eligible for services & programs					
The organization has a policy related to data collection on sexual orientation and gender identity					
Forms allow clients to report a preferred name and gender pronoun					
Participants receive notice of the organization's commitment to LGBTQ access					
The organization ensures confidentiality for clients in LGBTQ-specific services or programs					
Programs that serve by gender (e.g. women-only, gay/bi men only, mom's group, etc.) affirm clients' self-reported gender identity, sexuality, and familial relationships					
For services or programs specific to survivors of intimate partner violence:					
The organization engages in a comprehensive assessment process to determine appropriateness for services					
Staff are trained at referring LGBTQ individuals who are not appropriate for survivor services to other resources or programs					
Information on LGBTQ-specific referrals are readily available to staff & clients, and staff make LGBTQ-specific referrals (internal & external), when appropriate					
Co-advocacy relationships have been developed with LGBTQ-specific providers					

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FRAMING QUESTIONS

How might the intake process be improved to ensure LGBTQ people are welcomed and affirmed, and that confidentiality is maintained?

Do current referrals processes ensure that referrals are effective, safe, and appropriate for LGBTQ people?

Does the organization engage in co-advocacy with LGBTQ-specific organizations or providers?

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SERVICES & PROGRAMS

	Highly Effective	Effective	Not Effective	Has not taken action	Does Not Apply
Services & programs are periodically reviewed and updated to reflect best practices in working with LGBTQ people					
The organization maintains a client Bill of Rights that speaks specifically to LGBTQ access					
Programs and services are currently serving diverse LGBTQ individuals and communities					
The organization collects data to better understand the experiences of LGBTQ individuals & communities in services and programs					
The organization offers LGBTQ-specific services/programs					
Program materials have been made relevant to LGBTQ individuals and communities					
Health information & resources address LGBTQ health and HIV/AIDS					
The organization routinely utilizes participant feedback to improve services and programs					
Violence prevention programs address violence experienced by LGBTQ people					
For **support groups** and other **group programs:**					
facilitators make appropriate referrals for LGBTQ					
facilitators are equipped to respond to LGBTQ bias among participants					
curricula are analyzed for outcomes (positive/adverse) with LGBTQ participants					

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FRAMING QUESTIONS

Of the organization's current services and programs, which ones are best engaging LGBTQ people, families, and communities?

Are any of the organization's programs or services specifically designed to be accessible for LGBTQ individuals & communities?

Are policies, protocols, and standards of practice creating unintended barriers or impacts on LGBTQ populations?

What might your organization do to improve outcomes & experiences for the LGBTQ individuals & communities you are already serving?

How might you best determine the impact of your programs on LGBTQ clients?

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OUTREACH & COLLABORATION

	Highly Effective	Effective	Not Effective	Has not taken action	Does Not Apply
Organizational partnerships are evaluated for impact on LGBTQ access					
The organization intentionally develops relationships with culturally-specific providers					
The organization cultivates relationships with LGBTQ-specific providers and organizations					
Partnerships are periodically evaluated for fidelity to their intended goals and outcomes					
LGBTQ people, families, and communities attend organizational events and/or programs					
The organization officially participates in LGBTQ community and cultural events.					
The organization participates in regional task forces or coalitions related to LGBTQ survivors					
LGBTQ-specific organizations refer clients/participants to the organization					
Outreach materials (brochure, websites) indicate that the organization serves LGBTQ people					
Staff use social media and other online forums to outreach to LGBTQ communities					
The organization conducts outreach to LGBTQ-specific organizations					
Staff are encouraged to attend LGBTQ-specific trainings, conferences, programs, and events					

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FRAMING QUESTIONS

Does the organization cultivate relationships and partnerships with culturally-specific providers, including the LGBTQ-specific services, programs, and groups?

Does the organization utilize outreach strategies that appeal to diverse LGBTQ individuals and communities?

How might the organization improve its collaborations and outreach?

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DEVELOPMENT & COMMUNICATIONS

	Highly Effective	Effective	Not Effective	Has not taken action	Does Not Apply
The organization intentionally recruits board members to reflect the diversity of the communities served, including LGBTQ board members					
Board training/orientation includes information about the organization's equity & social justice efforts, including the organization's commitment to LGBTQ access					
Leadership (Board of Directors an/or Executive Management) can communicate the organization's commitment to LGBTQ access					
Leadership will advocate on behalf of LGBTQ communities in public forums					
Development efforts showcase LGBTQ-related work (e.g. highlight services & programs, collaborations and partnerships, LGBTQ client or staff stories, etc.)					
LGBTQ content is included in the organization's communications (blogs, newsletter, etc.)					
The organization advertises or collaborates with local LGBTQ-specific or LGBTQ-friendly media					

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FRAMING QUESTIONS

What information does the organization's Board of Directors need to prepare them to represent the agency's commitment to LGBTQ access?

Might the organization's development staff better integrate LGBTQ access into their communications and fund development activities?

MISSION & VALUES

	Highly Effective	Effective	Not Effective	Has not taken action	Does Not Apply
The organization integrates its values and mission into daily practice					
The organization has an equity & social justice statement that includes LGBTQ access					
The organization commits resources to equity & social justice efforts					
The organization makes its commitment to LGBTQ access explicit to stakeholders and the broader community					
Major policy and protocol decisions are analyzed for impact on LGBTQ access					
The organization encourages purchasing from women and minority-owned vendors/businesses, including LGBTQ businesses					
The organization's continuing improvement practices, accreditation processes, or other forms of evaluation include equity indicators, including those related to LGBTQ access					
The organization seeks out recommendations and technical assistance from LGBTQ- leaders, field experts, and organizations					

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FRAMING QUESTIONS

How does LGBTQ access fit into the overall mission & values of the organization?

Could the organization further incorporate LGBTQ access into its ongoing equity & social justice commitments?

How might the organization better advocate for LGBTQ survivors in the broader community?

Key terminology were developed specifically for the purpose of this tool. Organizations may choose to redefine, expand, or adapt the terminology to suit the organizational understandings of the term. Record any adapted definitions.

ALL-GENDER FACILITIES
Refers here to restroom/showers made available to all people, regardless of gender.

CLIENT
Refers here to any individual who accesses services or programming, or otherwise participates in activities conducted by organization.

EQUITY
Refers here to strategies and practices to ensure respect and integration of diverse perspectives and communities *and* to remove barriers and increase access to services for historically marginalized peoples and communities.

GENDER AND SEXUALITY DIVERSITY
Refers here to the spectrum of gender and sexuality related identities, expressions, perceptions, and experiences.

HETEROSEXISM
Refers here to beliefs, behaviors, cultural norms, and institutional practices that assume and privilege heterosexuality, heterosexual relationships, traditional gender roles, and marriage as being "natural" and preferred. Heterosexism implies that people are in only one of two distinct sexes, male and female.

LEADERSHIP
Refers to organizational leadership (typically, Board of Directors/Trustees and executive or managerial-level staff).

LGBTQ (lesbian, gay, bisexual, transgender, queer and questioning)
Refers here to all identities, experiences, relationships or communities that differ from dominant cultural expectations of heterosexuality, binary gender identities as assigned at birth, and traditional relationship expectations.

LGBTQ ACCESS
Refers here to a broad category of strategies and practices to ensure respect and integration of gender and sexuality diversity, and to reduce barriers to access and increase quality of services for LGBTQ individuals and communities.

NON-TRADITIONAL FAMILY OR RELATIONSHIP STRUCTURES
Refers to relationship or family forms that differ from normative expectations of a monogamous marriage/partnership of two people.

STAFF
Refers here to persons on the organization's payroll, as well as regular contract staff or consultants. Where volunteers operate in substantially the same functional manner as staff members, volunteers should be considered "staff" for the purposes of this self-assessment.

SURVIVORS
Refers here to individuals who are experiencing or have experienced a pattern of abuse, coercion, and exploitation within an intimate relationship/partnership.

VOLUNTEER
Refers here to a person who carries out duties or tasks for the organization without compensation.

This tool was adapted from the LGBTQ Access Project, a partnership by the Coalition Ending Gender-Based Violence in King County and The Northwest Network of Bi, Trans, Lesbian, and Gay Survivors of Abuse. © 2016

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