

Mission & Vision

Strive to promote values of equity, diversity and inclusion in the organization's mission and vision.

Introduction

Inclusive values and mission statements help funders set a commitment to communities through ongoing engagement, in support of greater impact

The mission and/or vision of a foundation, alternatively a “north star,” should be clear about the communities that the organization seeks to serve. This process can begin with honest reflection and thoughtful, informed discussions among board, staff and community members.

Tools for equity

Creating an equity-focused vision or mission statement in four steps:

Step 1: Organizational Learning

Build an understanding, among your board and leadership team, of your organization's commitment to equity, diversity and inclusion, and begin to identify gaps in your stakeholders' experiences of equity.

A commitment to organizational learning is critical to building a shared understanding of equity in your organization that reflects the needs of all of stakeholders, and moves your equity work forward. This process includes reflecting on your organization's history and understanding its present context.

Created in collaboration with [Equity Based Dialogue for Inclusion](#)

Action Steps

- **Define:** Begin by exploring terms and definitions to spark conversations and build shared vocabulary around equity, as well as related terms such as diversity, inclusion and justice
- **Vision:** Reflect on your organization's ultimate goal and how it intersects with your definition of equity and what equity would look like in your organization's context
 - What kind of success would make your organization obsolete?
- **Assess:** Conduct an initial diversity, equity and inclusion assessment at all levels of your organization, including the board, top management team, staff and external stakeholders. Clarify organizational gaps and outline opportunities for greater equity

Sources

YWCA Glossary

Michigan Nonprofit Association DEI Assessment Tool

Step 2: Collaborative and participatory visioning

Create multiple formal opportunities (in-person and virtually) for all organizational stakeholders to share their vision for equity in your organization.

The process of writing an equity-focused vision or mission statement is most effective when done through a collaborative and participatory process. Taking a collaborative and participatory approach increases the likelihood of organization-wide alignment on equity principles and implementation.

Action Steps

- **Build:** Invite people in your organization to support community and stakeholder outreach to ensure that all stakeholders feel welcome to participate in the vision or mission statement development process
- **Facilitate:** Host in-person and virtual "Town Hall" sessions for:
 - organizational leaders to share their thoughts about equity in relation to their vision for the organization and personal commitment, and

- stakeholders to share their perspectives on your organization's equity vision or mission statement
- Provide additional opportunities for stakeholders to provide input via online survey or feedback forms
- **Communicate:** Distill key takeaways from “Town Hall” sessions and other feedback mechanisms, and make a report detailing these key takeaways publicly available to all stakeholders

Sources

YW Boston

Facilitating Organizational Change

Government Alliance on Race and Equity

Racial Equity Action Plans

USC Suzanne Dworak-Peck School of Social Work

A Guide to Discussing Identity, Power and Privilege

Institute for Educational Leadership

Courageous Conversation About Race Protocol

North Carolina Center for Nonprofits Organizations

Initiating Conversations About Equity

Step 3: Statement Writing

Board and top management team members align on your organization's core equity principles and write an equity vision or statement, incorporating stakeholder feedback throughout the process.

Crafting an effective vision or mission statement requires a clear understanding of the feedback provided by your internal and external stakeholders. At this stage, it is **important for your board and top management team to achieve alignment on the core principles of your equity vision and mission statement.**

Action Steps

- **Alignment:** Crafting an effective vision or mission statement requires a clear understanding of the feedback provided by your internal and external stakeholders. At this stage, it is important for your board and top

management team to achieve alignment on the core principles of your equity vision and mission statement

- **Principles:** Identify “must-have” characteristics for an effective equity vision or mission statement in your organizational context. Keep your stakeholders’ feedback in the preceding step top of mind
- **Characteristics:** An effective statement is clear, specific, unique and should inspire stakeholders. Here, a review of effective mission and vision statements from peer organizations can be helpful
- **Feedback:** Conduct an open commenting process for both internal and external stakeholders. This is also an opportunity to revisit the facilitated discussions on equity from the preceding step

Sources

U.S. Chamber of Commerce

Writing a Diversity and Inclusion Statement

Open Growth Community

What is a Mission/Vision Statement?

Aperian Global

Crafting the Right DEI Mission

Step 4: Statement implementation

Commit resources and supportive structures, and recruit internal leaders to realize the principles detailed in your vision or mission statement.

Realizing the mission and vision of your organization calls for deep engagement with both internal and external stakeholders. This **requires committing resources, creating supportive structures and recruiting internal leaders to realize the mission and vision statement.**

Action Steps

- **Communication:** The board and top management team should communicate the purpose and importance of the renewed vision or mission statement. The renewed statement(s) should be reviewed by both internal and external stakeholders

- **HR integration:** The mission and vision should be integrated into hiring, onboarding, organizational assessment and performance review processes
- **Data reporting:** Key performance indicators (KPIs) or other metrics should be implemented to measure your statement's success over time. Structures and systems should be implemented to collect data that can measure and drive progress on equity commitments

Sources

The Nonprofit Association of Oregon

Equity & Inclusion Lens Guide

Dēmos

Dēmos' Racial Equity Transformation

NEO Law Group

Diversity, Equity, and Inclusion in Nonprofit Bylaws

Government Alliance on Race and Equity

Contracting for Equity

Additional questions & actions to consider

Additional questions

- What are the current and anticipated demographic and socioeconomic characteristics of the populations you seek to reach?
- How might diversity and inclusive practices advance your foundation's mission?
- Are the values expressed in your foundation's mission shared and embraced throughout the organization?
- Does your foundation's mission represent and engage the diversity of those you aim to serve?
- What would a greater emphasis on equity mean to your foundation and the communities it serves?

Additional actions to consider

- Develop an understanding, and communicate internally/externally, that equity is mission-critical
- Routinely collect, disaggregate, and analyze data by race/ethnicity in programmatic and operational work
- Propose targeted strategies that have been put through a racial impact analysis
- Develop mechanisms to manage accountability for equity, diversity and inclusion
- Support the efforts of affinity groups working on promoting equity across your organization

Sources

Council on Foundations

Ten Ways for Community Foundations to Consider Diversity and Inclusive Practices

RESPECT / Annie E. Casey Foundation

Advancing the Mission: Tools for Equity, Diversity, and Inclusion

RaceForward

Racial Equity Impact Assessment Toolkit