Racial Equity for Culturally Specific Organizations: An Assets-Based Evidentiary Assessment

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Abstract

*Culturally specific organizations have been missing out on the racial equity and cultural responsiveness initiatives that are prominent in nonprofits and government, due to the absence of relevant assessment tools, as well as discourses within these initiatives which have overlooked the sector of culturally specific organizations and subsequently provided a competitive advantage to culturally responsive organizations. This paper reports on the development of a culturally specific organizational assessment, and the results of a four-site pilot study of the tool. Findings show the [**Tool]** achieves its objectives of creating actionable insights and quality improvement plans. Additional benefits emerge from the pilot's participants: that an evidence-base for the organization's assets is initiated, that organization-wide identity is strengthened, that staff have been energized by relevant equity dialogues and relationship deepening, and that motivation for research and evaluation that captures the fullness of the organization's impacts be undertaken. Samples from the tool are included.*

Keywords: racial equity, culturally specific organizations, organizational assessment, cultural responsiveness, accountability, ethno-cultural organizations

Introduction

There is a little-known service delivery model that has been gaining profile and influence in the Pacific Northwest, although it is not unique to this region. Called "culturally specific organizations" these are organizations that service specific communities of color and that have distinct relationships with these communities, having been developed by and for these communities. Over the last 15 years, the sector has consolidated in [the region] and developed a collaborative coalition that has been a prominent advocacy voice. There are two foci to this advocacy: the first is identifying racial inequities that are prominent in the region and advocating for racial equity initiative to be taken up in public and institutional policy and practice. The second is advocating for larger portions of funding to be allocated to these organizations that have been generating very strong outcomes with clients of color. In a subsequent initiative that is the focus of this article, a subset of these organizations has come together in a collective impact model, to address both needs of the partners (of which there are 6, including the backbone organization) [to be named in the article] and to conduct research that holds potential to deepen the evidence base of the practices that are effective in supporting children and their families. The research methodology will be detailed in the subsequent section: first we identify the rationale for the organizational assessment tool.

In [the local region], attention to racial equity has surged in recent years. Largely attributed to a series of research reports published by the [local coalition], policy makers have taken notice and responded with commitment to address racial disparities across numerous systems and institutions. The [coalition] and its members have been working strategically to prioritize issues and levels of government and have been successful in altering the funding landscape for culturally specific organizations (CSOs). More dollars are definitely flowing to CSOs and, due to parallel advocacy efforts by the [coalition], expectations have been raised for mainstream and culturally responsive organizations (those working to improve their racial equity and cultural responsiveness) to disaggregate their data to identify how well they are serving community of color. One feature of this movement is that funding bodies (both government and philanthropy) are requiring that organizations conduct an organizational assessment for racial equity and cultural responsiveness, and submit their action plan for improvements to their funders. This has been an important gain for racial equity in the region.

Here is where the issue becomes more complicated: these tools are designed for mainstream organization, aiming to educate and support discernment of assets and challenges – both omissions and violations – with which mainstream organizations practice.

In a pilot study of an organizational assessment tool back in 2013 (citation blinded), two culturally specific organizations completed the tool, only to assert that it was a cultural mismatch and the tool did not work for the organization. At the same time, local funders and the community in general, views equity assessments as an important accountability tool, and leaving culturally specific organizations omitted from this accountability step diminishes their credibility. It also leaves them out of a series of investments to improve racial equity, as funding is sometimes available for these processes, as well as technical assistance, abundant trainings are available on the topic, and numerous culturally responsive organizations are gaining profile through speaking engagements, and access to policy makers. The problem, thus, is two-fold: first, the movement towards racial equity within dominant culture organizations is helping such organizations become more desirable. Note, at the same time, that communities and organizations of color affirm these efforts for their promise to better serve their communities. Unfortunately, the practice of unequal investments has tended to leave organizations of color with a reduced competitive advantage.

The second problem is that of having inadequate assessment tools for CSOs, and one that this initiative begins to address. Trenerry and Paradies (2012) identified significant benefits emerging from conducting organizational assessments: creating an evidence base that problems exist, creating impetus for serious reforms, sustaining a focus on the whole organization, creating organizational accountability, and raising internal and external expectations. Together, these benefits create momentum for change.

This research initiative aims to fill the gap and create a relevant CSO-specific tool: by using the findings of a major research study, we operationalized this evidence base to create an organizational self-assessment for culturally specific organizations. We now have piloted the Tool with four organizations and share these insights in this article.

Research Methodology and Results

The broader collective impact initiative [to be named in the article] that created the umbrella under which this [name] Tool development has occurred has engaged in a combination of service design and implementation, systems change and advocacy, and research. This paper builds on one of its major research initiatives, and its subsequent adaptation into an organizational assessment tool. The research study is a combination of an in-person Delphi study, and a consumer voice study. Briefly, the Delphi is an established research method whereby experts come together to build consensus on a complex topic (Hanafin, 2004). Linstone & Turoff (1975) provide greater detail, with this definition: "A method for structuring a group communication process so that the process is effective in allowing a group of individuals, as a whole, to deal with a complex problem" (p.3). In our situation, approximately ten deeply experienced organizational members were nominated by each organization, who came together for three four-hour sessions to build consensus on the features of their culturally specific organizations that they perceived were responsible for gaining excellent outcomes. The result is a two-part list of 12 organizational assets and 25 additional assets that characterize the organizations' staff. Of interest, these organizations each represented the following communities: Latino, African American, Native American, Asian and Pacific Islander, and immigrants and refugees of color.

Once this research concluded, a second part to the study was conducted to assess how clients and community members valued the organization. Community researchers were hired and trained to gather data in each organization, using a mixed methods approach with heavy reliance on a 44-question survey alongside these qualitative efforts: eleven focus groups, 46 interviews, 6 popular education activities, and 22 organizational and program observations. The survey reached a representative sample of clients, at 505 completed surveys. While there is much to be learned from the research, we can definitively state that clients highly value the full range of organizational and staffing assets, with an average rating of 92.7% achieved in the top two ratings of a five-point Likert scale. Our best efforts to discern an industry standard came in at approximately 77% (blinded reference, 2018).

In short, the results of this study (blinded reference, 2018) have articulated the assets of the partner organizations and established their high valuation by clients and community members. The full set of assets provides a significant window into the approaches that are used to culturally specific organizations to effectively serve their communities. Sometimes we refer to these insights as the "recipe" or "ingredients" that accounts for their strong results. The assets cover the following domains:

- ***Community embedded***, meaning these organizations are historically and currently by, of, and for the community;
- ***Culture of success***, as tied to holding beliefs in the strengths of clients and the community, and high expectations for positive outcomes;
- ***Responsive to community needs***, with practices that ensure priorities are surfaced and the organization is intentional in their responses;

- ***Advocates to improve community and client success***, with policy and institutional advocacy effectiveness a priority;
- ***Inclusive,*** with community members entering the organization knowing they belong and respect is experienced;
- ***Culturally relevant,*** meaning that services are designed for the community, respectful of their cultures, traditions, and circumstances;
- ***Comprehensive continuum of services,*** with holistic wraparound opportunities available wherever possible, and the whole family welcomed;
- ***Relationship model,*** whereby staff prioritize welcome, compassion, affirmation, respect and responsiveness;
- ***Staff are personally invested,*** as they emerge (primarily) from the same communities as their clients and subsequently hold futures that are tied to the success of their clients and community.

Creating the Tool involved a collaborative process of 2-3 nominees from each organization who became the Advisory Committee for the Tool's development. The team met three times to clarify objectives including depth and breadth of the Tool, troubleshoot organizational ambivalence (discussed next), and contribute to the specific questions in the Tool. We also consulted with the larger project's Data Team who has met every two weeks for the last four years and serves an essential role in the larger initiative, leading and advising the research team at United Way, as well as the Principal Investigator from [a local university]. When ready to launch the pilot, each organization was oriented to the Tool, technical advising support made available, and asked to complete the Tool within a three-month period in the winter of 2018. Once completed, one-hour debriefs of that experience occurred, with a visit from the PI and United Way's lead researcher, attended by ¾ of the members of the local teams leading the assessment attending. In addition, a survey was conducted for those who were not able to attend the debrief meeting, to capture their experience.

Before the Tool itself is described, it is important to understand the significance of this undertaking, and what can best be described as ambivalence of both the Advisory Team and the Data Team for the undertaking.

The [name] Tool: Contentions

Creating an equity-oriented, CSO-specific tool is somewhat contentious. Unlike the equity assessments for culturally responsive organizations, this assessment is not about discerning the status of the organization's location on a spectrum of cultural responsiveness. It is not about determining if the organization is a "good enough" CSO. Rather, it is about CSOs assessing the concrete ways in which they integrate assets and identifying areas for deepening their relationships and responsiveness to community needs and priorities. It is not about whether a CSO is culturally specific or not; it is about how the CSO demonstrates its assets. We decided not to include a "benchmark" or "targets" approach as this would communicate a sense of whether the organization is "good enough" to earn its status as culturally specific.

Another contention is that this effort is a capitulation to funders who are perceived to be over-scrutinizing communities of color, and that the project holds potential to backfire. This concern emerged from some organizational members who envisioned that their reporting of results would be viewed as a deficit. When mainstream organizations begin an equity journey, they are applauded for their initiative and sharing of their challenges in advancing equity. Their shortcomings are perceived as authentic insights, and they are perceived as honorable in committing to the journey. As culturally specific organizations dig into related work, concerns emerge about the ways this effort will be interpreted. Rather than being honorable, it may be perceived as disclosing unforgivable deficiencies, particularly when CSOs have been understood as the service delivery models of choice for communities of color. In some ways, this is a result of the effective advocacy with funders, whereby CSOs have been asserting their capacity to effectively serve their communities. Here is the message that was provided to funders to anticipate this dynamic, and also included in the Tool to highlight that parallel advocacy is being done to resist this potentially damaging discourse:

We ask for funders and stakeholders to give CSOs the same affirmation and support as has been seen when CROs undertake such self-revealing work. It is tough to scrutinize one's own practices. Know the sector undertakes this work with the goal of better serving their clients and communities. This is a movement worthy of respect and support. [blinded reference, 2018, p.X]

In response to this concern, agreements were reached with [local funders] that reporting would be limited to the action plan that emerges from the assessment.

The [name] Tool: Content

The full Tool document includes an introduction that addresses the above concerns, an FAQ on how to complete the Tool, the tool itself, a set of standards that are aspirational in nature and emerge from the Delphi findings and other relevant literature, a framework for creating an action plan, definitions, and supplemental resources, such as a client assessment tool that can be used to gather feedback on the organization and services. The Tool's questions include yes/no responses, short answers and narratives/longer answers.

The [Tool] includes ten domains, 75 standards, and a total of 87 questions. A sample of one standard and a related question is included with this article. We share this to demonstrate the character and a little bit of the substance of this Tool, recognizing that these details are only a glimpse of the content.

1. Governance, Advocacy and Leadership
   a. Standard: Represents community priorities, needs and assets (one of eight standards)
   b. Sample question: How does your organization support staff, volunteers and clients to be leaders in three areas: the organization, the community and informing public policy?
2. Community Embeddedness and Responsiveness
   a. Standard: Has structure/policy to be accountable to the community (one of eight)
   b. Sample question: Does the organization have a formal process for identifying new and shifting community needs?
3. Serves the Community
   a. Standard: Programs engage in advocacy to advance anti-racism in institutions that influence clients' lives (one of nine)
   b. Sample question: What racial disparities are you prioritizing in your advocacy efforts? What progress has been made?
4. Service User Inclusion and Influence
   a. Standard: High linguistic accessibility for clients (one of seven)
   b. Sample question: How do you ensure clients are served in their preferred language?
5. Workplace Composition and Capacity
   a. Standard: Staff and volunteers understand the cultural characteristics of those served, the fullness of service needs, community assets and histories of oppression (one of seven)
   b. Sample question: What Human Resources policies and procedures exist that support staffs' abilities to work in a culturally specific environment? How are these communicated to staff?
6. Relationship Characteristics
   a. Standard: Demonstrate respect (one of twelve)
   b. Sample question: Does your staff evaluation system highlight critical self-reflection as a core competency for all staff?
7. Advocacy, Anti-Racism and Anti-Discrimination
   a. Standard: Members are participating in public and institutional policy reforms and are effecting change (one of seven)
   b. Sample question: Does the organization have an advocacy agenda that is informed by the priorities facing the communities served? If the organization has an advocacy agenda, how was it developed?
8. Building Evidence Base of Practice
   a. Standard: Contributes to building and disseminating evidence on the effectiveness of CSOs (one of six)
   b. Sample question: Is the organization conducting outcomes-based evaluation research on a variety of programs each year?
9. Resource Allocation
   a. Standard: The organization uses its resources to expand opportunities for families, including that its expenditures support local communities and businesses of color (one of six)
   b. Sample question: How well supported are the (typically) unfunded mandates of the organization, such as community development, advocacy and leadership development? How does the organization sustain these activities?
10. Data, Metrics and Quality Improvement
    a. Standard: Has an effective quality improvement process that is rooted in client and community experiences of the organization (one of five)
    b. Sample question: Give some examples of metrics you are currently using for tracking client and community progress

We encourage interested readers to connect with [backbone organization] regarding access to the 17-page assessment tool.

Learnings from the Pilot

This section is organized to cover the experiences of the four pilot organizations, introducing the section with a summary of the goals of the assessment and action plan process. Attention then turns to methods through which the Tool was administered, and subsequently to the experiences of the pilot organizations, divided into the process-oriented experiences, and then the substantive insights the Tool yielded. Closing this section are learnings from the pilot experience.

The goals of this Tool were robust:

- Its implementation provides actionable insights for participating organizations
- It holds potential to be a source of quality improvement
- Through its alignment with the research-based Delphi/Consumer Voice study, the assessment becomes a source of evidence that organizations can use to discern its alignment with the ideal features of a culturally specific organization
- It provides an important counternarrative to culturally responsive and mainstream organizations, highlighting distinctive assets of CSOs, and supporting an aligned but unique approach to equity is relevant to the context of organizations of color serving their own communities
- It holds potential as an accountability method to be used with stakeholders, funders, and local communities

Administering the Tool

Those designing the Tool anticipated that it would begin with senior management deciding who would lead the Tool process, and subsequently this driver/s would ask for self-nominations to participate, and then the organizational leaders or their delegates would ensure that there was breadth across the organizational departments as well as hierarchical representation. Supplemental invitations would be made to ensure this. Our initial FAQ content identified that the team of ten to twelve people would likely need to meet three to five times for three to four hours. It was designed to be self-administered, without the need for a consultant to guide the process. We also expected that two or three people would do the writing of the assessment, requiring additional hours for this role. Variations to this envisioning occurred in the pilot and shared below.

The reality of organizational life is that getting a large cross-sectional team together is very difficult. Organizations also are stretched in different ways for different reasons: at year-end, for example, administrators are working to close off budgets and grants. In the summer, many staff take holidays. In the fall, many programs are ramping up, and often with new staff being onboarded. When large grants are applied for, staff leads and data staff are stretched. In essence, there is rarely a good time for gathering a large group of organizational leaders and regular staff with representation across the organization. In response, we see that each organization adapted to their own context. Here are the processes used by the pilot sites:

- [Organization 1] worked with an existing management team as the primary team, and those members brought relevant topics to their own teams for input. Additional staff groups (including all-staff meetings) discussed relevant questions, totaling 8 additional meetings. The primary team met four times, and additional preparation meeting occurred between these members.
- [Organization 2] determined it was impossible to gather a large group for a series of meetings and had one coordinator meet with smaller groups that represented all sectors of the organization. Fifteen people were involved in the assessment, organized into smaller teams, and responding to a range of questions that were assigned to each team. A total of ten meetings were held, and all meetings were scheduled within one week. The staff lead reviewed and organized the questions according to the expertise of the staff in the organization.
- [Organization 3] decided to hold just two meetings with the team of ten. The first was 90 minutes, and the second was going to be as long as was needed, and the work was completed in 3 hours. There were two representatives from each of 5 organizational teams, and each team shared their input on each question in the Tool. The same group was involved from start to finish in this method. Reducing the number of meetings to two supported this organization's process.
- [Organization 4] was completed in a manner similar to [Organization 1]. The executive team led the process, and appointed a leadership team to organize and facilitate the process. This was a program team of three people who were consistent in attending three meetings. All in the organization were invited to join the assessment process, with the management and executive team leading the process. Three 90-minute meetings occurred and 20 people participated. This larger team of 20 worked through the questions sequentially. All departments participated, and there was representation across the hierarchy of the organization. Between the meetings, notes were posted and all were invited to edit and expand on the notes.

  Each organization adapted to its local context, its opportunities to include additional staff, and the degree to which the organization was time-pressed. The variations show the adaptability of the Tool alongside the creativity and responsiveness of the Tool administrators in the organizations to ensure that the process was not overly onerous and that local conditions (such as time constraints and limited availability of staff) were respected.

Insights from Debriefing each Organization

- Process-Oriented Experiences

This section identifies two benefits of the assessment experience: broadening one's understanding of the organization, and relationship development. It also covers perspectives on two potential challenges: the involvement of the CEO, and the narrow timeframe of 2 months for implementation.

All the organizations in this pilot have budgets in the range of $10-20 million, and are relatively large human service organizations. Staff complements are typically larger than 100, and many do not know each other, particularly between direct service and administrative staff. Each of the participating organizations identified how listening to others' perspectives holds potential for a spectrum of benefits.

A few examples illustrate these benefits. [Organization 4] shared stories about clients who had been successful in the long-term and the ways the organization had supported them. Catalyzed by the questions in the Tool, these narratives helped all units understand their contribution to these long-term success stories. Staff also stated that "*the process helped us to learn about other parts of our organization.*" [Organization 1] highlighted the generative conversations that served to energize and broaden possibilities for the future of the organization. While these specifics are in the next section, the contribution of the Tool to foster generative, relationally-rich, explorations of the organization is encouraging. The ethos created by the Tool served to strengthen steps forward.

Each debrief group was asked about the level of authenticity they perceived existed in the assessment dialogues. Across the groups, they perceived that there was high authenticity as the dialogues surfaced both assets and challenges facing the organizations. In the words of one partner, "*we had lots of 'yes' and 'no'… sometimes perspectives varied across departments and sometimes members within the same team had different perspectives… each conversation spawned additional conversations.*"[1] Another partner identified that it took a little bit of time to build authenticity, as "*people want to shine – not admit their failures*." Only one of the four organizations decided to include their CEO, perceiving that it could narrow the comfort of participating. That said, it was important to have a senior administrator as part of the team who could speak on behalf of the CEO, and who had decision making authority. All organizations were sensitive to this possibility and held "*concern for the chill*" the CEO presence might bring. Most decided to not fully participate but to attend for half the sessions and pay attention to the dynamics to see if critique was surfaced. In the words of one staff lead, "*safety and openness was noticed… staff comments were not judged or evaluated, but seen as a perspective*."

In each team's debrief, the question of a 2-month timeline for completion was raised. While all recognized the importance of gathering more voices, none advocated for a longer time period. One member said, "*it forced us to be motivated moving forward*." While each question could be discussed at greater depth, the teams identified their own "*sweet spot*" of time and comprehensiveness. While these varied, they were relatively equivalent, and no organization became disenchanted with the process and commitment remained high. This is an excellent achievement as implementing the action plans is the most significant outcome of the process, and where real organization strengthening can be experienced. If the process were drudgery, then energy for its results would be depleted.

- Substantive Insights from the Experience, and Action Plan Priorities

While this article distinguishes process-oriented and substantive insights, these are actually intertwined, and mutually reinforcing. They are addressed in separate sections to distinguish the unintended relational benefits from content that links to the Tool and assists in detailing how it achieves its intended goals.

The debriefing sessions illustrated how substantive insights were achieved with each of the organizations, and additional value-added from the Tool. Each organization will be discussed in turn, and include the broad dimensions of the Action Plan. The organization serving immigrants and refugees [will name] has already benefitted from completing the Tool. First, in their words, "*staff are super-appreciative of these CSO-specific equity discussions*." It "*makes concepts like respect tangible.*" The assessment processes coincided with a strategic planning process where staff have sought to define an answer to this: "How do we live equity?" The Tool provided them with answers to this question, and in turn strengthened their strategic planning tasks. Staff experiences further affirmed the benefit of the asset-based approach that is embedded in the Tool: "*we really like the asset based [approach] for defining a CSO, ranging from leadership to programs. Without this, it is hard for staff to defend [the organizational model]… at the organizational level, it highlights our depth and uniqueness*."

Second, in completing the Tool,

[1] Italicized text are quotes from staff in the pilot organizations.

We found threads that continue across the organization… and built our identity as an organization… we've wanted to be more than a collection of programs…. this builds our base to grow on…. We identified the common themes that we all share.

This identity-based benefit was unanticipated. [This organization] has culturally specific units (with their own governing and advisory structures) alongside more pan-community services. Resulting from the Tool is a stronger sense of organizational integrity, with these threads helping members discern its comprehensive asset base, and there was, to those of us in the debrief, a palpable sense of pride in the organization.

The third, and potentially most important benefit, is that the Tool "*builds the evidence base for us… and expands broader understanding of CSOs.*" It provides the organization "*with a way to quantify and evaluate equity.*" The Tool itself, due to its rooting in a robust research process, creates an evidence base for the organization in terms its alignment with and incorporation of the Delphi assets. The Tool supports the organization's ability to identify its assets and its priorities for quality improvement.

A challenge surfaced for {Organization 1]: "*highlighted was the need for alignment of data systems*," which are unaligned due to the disparate reporting requirements of funders. [The organization] now sees the need for and importance of pan-organizational impacts. This in turn, requires a different approach to evaluation, beyond the typical program-specific, client-focused evaluations required by funders. [The organization] now perceives their future to be increasingly tied to an ability to identify, on an organization-wide level, their impacts and return on investment.

[The organization] intends to repeat this assessment in the next year or two. It also envisions a broader consultation process with clients to include their perspectives more directly, and inclusion of the organization's Board of Directors, and the Advisory Boards of their community-specific programs. Its Action Plan will focus on making the threads that became apparent in the assessment process more durably embedded into the organization, through policies and procedures development. Aiming for greater consistency across the organization is its goal, and supporting its staff to align more fully with related objectives is seen as a parallel process. The organization also intends to develop a more cohesive set of evaluation practices that will document the ways in which the organization is impacting the wellbeing of its communities.

The second organization [named] serves the African American community. Completing the Tool was confirmed as a "*good exercise [that] affirmed the range of our practice*" which were often a compendium of "*many small things*" such as being open on Saturdays and having many initiatives to support Black families. The benefit of focusing on the whole picture of the organization as opposed to the conventional stance of focusing on specific programs was important: "*It was good to slow down*" and keep the assets of the organization in view. Discussions were generative, as abundant ideas emerged, such as avenues for client feedback to be gathered, and parent advisory groups to be created for youth programs. Another benefit was to help the organization prepare for a generational turnover, as many of the long-term senior staff are approaching retirement. Completing the assessment brought the issue of fidelity to the organization's values into focus: there are many assets of the organization that have not been codified, some of which have historically been priorities and treated intentionally, but others have been somewhat neglected over time.

At times, it "*felt odd to explain practices, because this is just what we do.*" For example, about 85% of the staff are African American, which is "*not due to policy, but what we do.*" Bringing these assets into focus, and placing them into a larger framework of culturally specific organizations as a service model is helpful both for this organization and additional CSOs.

One important challenge for [this organization] was ambivalence about creating policies to entrench the organization's practices and procedures. While the overall assessment process highlighted that "*we do things every day that we take for granted*" there is value in making commitments more durable and entrenched. But similarly, there is concern that policy can lead to a loss of flexibility and creativity in how staff responds to clients and community members. Overall, the group decided that the organization can benefit from codifying approaches, as a practice that can both invigorate attention to neglected elements, protecting from lost history with staff turnover, and onboarding of new hires.

The third organization [named] serves the Latino community. Completing the Tool came after the organization conducted a climate survey a few months earlier. The climate survey was more ground-breaking for the organization, as it was a deep dive into the ways in which inclusion and acceptance were actualized for staff. Results were overwhelmingly positive and the task of this Tool was an easier process for all. The debrief with the team leaders was straight forward with few concerns raised. The process was confirmed as beneficial for the organization, and it was important to have "*our organizational values embedded in the Tool, and shared across the CSOs.*" As the Tool "*helps the organization identify these values [and how they show up], it helps strengthen the organization*." An additional benefit was highlighted: that it is "*rare to focus on the whole organization*" which is a benefit echoed by all the pilot sites. Extending this, it is also of benefit to bring multiple lenses to the domains covered in the Tool, as each program team in the organization commented on each question, and all on the assessment team heard these perspectives, frequently leading to a deeper and more nuanced understanding of the issues.

The fourth organization [named] serves the Native American urban community. [The organization] found that the Tool supported their engagement as a community of staff. Although their cross-organizational identity is strong, the pace and volume of work limits the depth of relationships that exist across the 140 full-time staff. Relationships between staff are key for sustaining relationships and developing program innovations that expand access to services across departments. One example is that staff in two programs had time to discuss client experiences and to share long-term progress of some youth. The desirability to better link the two programs became clear, and service linkages are now being developed for clients from exploring college and career opportunities and preparation for adulthood.
In another example, staff across departments deepened their appreciation for the fullness of how service-level staff are committed to their clients: "*Everyone here is on overload. Their life and job are one… they put in a lot of extra hours. It really is remarkable*."

Major elements of the Action Plan are two-fold: to create a consistent and formal process for organization-wide client satisfaction assessments, and to make more effective use of evaluation practices and the data collected by the organization. At present, numerous programs are required to submit to outcomes to funders, but cross-organizational data is not effectively used to strengthen the organization. In addition to these core elements in the Action Plan, there were insights that will inform the strategic plan of the organization as it articulates its vision for the next five years. Insights from executive staff are that there has been mission drift as a consequence of funding constraints, and the organization aims to deepen the resources it makes available to its community, and aims to strengthen its identity as a holistic presence in the community. Says one leader, "*We are trying to keep clients here instead of sending them out to other [non-Indigenous] services… we are looking at us as a whole with many moving parts*." Another stated: "*This helps our strategic plan and opened ideas of where it can go… [the organization] already has a sense of who we are as an organization… now we can focus on where we can go."*

The organization also includes more relationship building time across the organization, and intends to "*create time to explore and develop more collaboration and collective responses*" to client and community priorities. If some streamlining of workloads could occur, the value of simply being together in dialogue about the organization and its community could manifest. Preserving the "*sense gained in doing the Tool*" could strengthen the organization.

Conclusions from the Pilot Study

Overall, participating organizations confirmed that the Tool process was valuable for their quality improvement, for affirming their organizational and staffing assets, and for furthering their insights and vision for strategic planning.

There are four core learnings from the pilot process: (a) the Tool achieves its intended goals, although it is premature to confirm how quality improvement is achieved, (b) gains for the participating organizations are varied and positive, (c) creativity in administering the Tool demonstrated its adaptive capacity, and (d) very few revisions are suggested prior to disseminating the Tool itself.

Tool Revisions

Relatively few improvements were recommended for the Tool. There were two questions that were repetitive, and a few questions on communicating the findings and developing the action plan needed to be move towards the end, as they were positioned prematurely in the text. Overall, we were surprised that so few tool revisions were suggested, as it is a large tool (at 87 questions) and all four major equity groups (Indigenous, Latino, African American, Asian and Pacific Islander) as well as immigrants and refugees participated in the pilot study. The debrief of the pilot revealed procedural suggestions, and highlighted relational opportunities embedded in the Tool, but the Tool itself was deemed strong and relevant. A minor element is that linguistic questions are most relevant for organizations that serve relative newcomers to the region. A note will be placed in the document to skip these questions if not relevant, and an additional question asked about the role of the organization in preserving the original languages of those in their community, as a pathway to strengthen cultural identity.

One organization identified the need to refine language and nudge a few questions towards being more culturally specific. For example, the Tool relied on the concept of "quality improvement" (QI) in an untroubled manner, without recognizing that there is a dominant culture context to QI that presupposes objective decision making, concise decisions to respond to new information, and an ability to track outcomes. The partners in this study are typically skeptical of dominant culture research, which has often been used to marginalize their communities, and impose interventions that have not been validated with their own communities and in the current context, which for these organizations, in the era of President Trump's active marginalization and dehumanizing of immigrants, refugees and communities of color, has been considerable. It will be important, in the months to come, to review the concept of "quality improvement" and establish a culturally specific version to be integrated into the Tool.

A second organization extended this concern to using the Tool for accountability practice. Again, accountability has typically worked against culturally specific organizations, as the requirements for accountability have been dictated by majority culture organizations within frameworks that function within dominant discourses about both interventions and results. Little attention has been paid to themes such as resistance to racism and xenophobia, or to deepening critical consciousness. That said, all were in favor of using the Tool to be accountable to one's staff and one's community, but cautious of the boundaries that could upheld to keep their efforts from being scrutinized by unintended audiences. It is important to remember that majority culture systems have created this dynamic and the skepticism that results is important to respect.

Digging deeper into critique of the Tool, cultural dimensions were discussed in the debriefs. For the organization serving immigrants and refugees, there were insights on occasional lack of alignment between the local context and the Tool's context. One of the foundations of the Tool, as well as the Delphi results, is that clients are best served by members of their own community. While this is affirmed in the literature in fields of social work, education and health services (as examples, Eddy & Easton-Brooks, 2011; Hohman & Galt, 2001; Kumsa, Mfoafo-M'Carthy, Oba & Gaasim, 2014; Gutierrez & Lewis, 1999; Rivera & Erlich, 2001), there is a small set of program participants who would prefer to be served by a person who shares their larger lived experiences (as immigrant, as Black, and as African – for example), but not by someone who is a member of their clan or sub-clan: "*For oral societies, information is power*" and this concern tends to negate assurances of confidentiality.

Another foundation is that clients benefit most from more comprehensive engagement with the organization, but there are relatively large sections of the community that "*come when they are in need, but then don't come in again*." This prevalence tends to cause the organization to prioritize crisis services, although believing that clients are best served in preventive, holistic and comprehensive culturally-relevant services.

Third, there is a construct in the Tool that clients will ideally build a prideful identity within their own culture. This is limited, however, by a range of clients who do not want to be explicitly recognized as members of their own communities, due both to a yearning for inclusion in US society, and due to the xenophobia and racism that seeks to have people of color distance themselves from their cultural and ethnic supports and traditions.

These three challenges do not undermine the Tool, and no revisions were asked for related to these concerns. But these insights are important to preserve, and to share with those who implement the Tool in the future, so as to build awareness of the challenges in alignment across cultures and contexts that may require local adaptations. An additional introductory section will be added to groups who face similar concerns and to suggest pathways to reflect them in the text of the assessment process.

A final appeal was made by one organization: that measurement within the Tool could benefit from being more quantitative. For the organizations wanting to measure change across time, the current heavy reliance on narrative poses some challenges. Discussion was held early on in the Data Team (as the Tool was being developed) about the value of having clear quantitative metrics embedded in the Tool. Quite simply, the generative dimension of having multiple perspectives on key themes would have been narrowed, and highlighting quantitative dimensions would have reduced the appeal of the process for many involved. How an organization reflects (for example), the inclusion of its community cannot be reduced to a number. On this question, we discussed the option of saying, "how many community members provided feedback to the organization in the past year?" The Advisory Team and Data Team discerned that (a) too much effort would be required to track this for relatively little gain, (b) the group tracking this could change in subsequent years and variations in the method would negate the reliability of the findings, and (c) emphasis on numbers to measure what should be a quality metric held potential to diminish the intention of the item. Ultimately, while many on the Data Team held a desire for more quantitative measures to best measure progress, qualitative measures were preferred and thus prioritized.

To reflect the spirit of this desire, a few more quantitative dimensions were included in the yes/no questions, such as, "do you collect data on the race and ethnicity of your clients and staff?" and "do you have a formal process for listening to community priorities?" Implied are that some key practices can be tracked over time. Moving from a "no" to a "yes" would signal substantial quality improvement. An addition was made to the Tool to include a range of additional resources that could assist organizations to further operationalize some initiatives, such as a client satisfaction tool, and a partnership assessment tool, and a staff self-assessment that could be used by an organization aiming to establish metrics (with Likert rating scales) to further define current status and progress over time. As supplemental resources, these are optional.

Conclusions of the Tool [named]

Our conclusions are five-fold. The Tool is an organizational assessment process that is relevant for culturally specific organizations across different cultures, filling an unmet need among organizational equity efforts. Second, the Tool has led the participating organizations to develop action plans that cover a spectrum of beneficial insights and intentions. They highlighted and reminded organizations of the fullness of their value to their communities, stretching considerably beyond the normal program evaluation insights that are more limited in focus, and operationalized ideas for quality improvement that are seen useful for strengthening the organizations' value to community wellbeing. Third, participating organizations anticipate using the Tool's results to strengthen the evidence of their usefulness to their communities and service users. In being tied to a research study that evidentiary in nature, the results deepen the organizations' own evidence base, and subsequently their credibility for effectiveness with culturally specific communities.

Fourth, the Tool's process has led to unanticipated benefits that are relational in nature, and that these improved relationships hold potential, in turn, to improve programs and services, organizational identity and capacity to deepen collaboration and problem solving. Fifth, the Tool can adapt to an array of implementation sensibilities and continue to generate useful results.

Regarding unmet goals, it is early as yet to discern quality improvements that result from the action plans, we are unable to confirm that the Tool is useful for quality improvement. That said, at the close of the Tool processes, energy remains high for the teams implementing the process, and confidence in the usefulness of the findings is also substantial.

The nature of the items in the pilot organizations' action plans are a combination of what can be called "low hanging fruit" that can be readily implemented and more serious actions that are useful to each organization's relationship with their community. These include a range of enhancements that include more robust roles for service users to inform organizational priorities, entrenching key practices into policies, deepening relationships across branches of the organization, and strengthening the organization's use of data systems – which was the only element that surfaced across all four pilot organizations. A vision exists across organizations to have time and resources to learn more about the whole organization and avenues that need strengthening. This comes with a needed advocacy agenda to have funders prioritize this over program-specific output and occasional outcome measures.

Next Steps

Tracing the long-term organizational benefits of conducting the assessment and action plan for these pilot organizations holds potential to be helpful to our knowledge base of the usefulness of this Tool. Such tracking could also help guide future revisions to the Tool, ideally lowering the number of questions to a less time consuming organizational commitment. The teams developing the Tool worked hard to achieve this and were successful in reducing the original number from 114 to 87 questions but were unable to go further. If we had insights on the vehicles that yield the most important forms of quality improvement, a narrower tool might result. Such prioritizing is impossible at this time.

The Tool has emerged, as evidenced through this pilot study, as a community-validated organizational assessment and action planning tool for culturally specific organizations. This is the first of its kind, and holds promise to support and deepen organizational capacity for amplifying the distinct assets of culturally specific organizations, which have been confirmed by service users as holding heightened value to their lives. The promise for improved client outcomes has been strengthened by this pilot study.

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