

**Questions to Consider in Assessment of LBE Progress
(After 1 to 1.5 Years of Work)**

1. Briefly describe the plan of work you undertook at the beginning of this process.
2. How did your team define “success” for this work as it relates to creating a more diverse, inclusive, and equitable organization?
3. What organizational strengths and assets (in regards to diversity, inclusion, or equity) did you identify through your various assessment efforts? What weaknesses or gaps did you identify through your various assessment activities?
4. What strategies have you used so far to engage other foundation stakeholders in your (internal) organizational change efforts related to diversity, inclusion, and equity?
5. Who have been the key players; what are their interests in this work and their capacity and involvement in playing an important role?
6. List major accomplishments of your efforts to date.
7. Briefly describe the status of the work at this time.
8. What remains to be done? What are your short-term objectives? What are your long-term objectives?
9. Has your team developed a plan to support your foundation in achieving these objectives? Have the foundation’s trustees ratified the plan? Allocated resources for the plan?
10. What have been key barriers that your team encountered in undertaking this organizational change work?
11. Have they been overcome? If not, what additional strategies will you use to overcome them?
12. What assistance/resources do you think might be needed to successfully integrate this work in the internal systems, policies, and culture of the community foundation?