**BMP Demographic Investee Survey**

Blue Meridian Partners is committed to supporting, engaging, and learning with our investees. Today we are inviting you to share with us where you are on your racial equity, diversity, and inclusion (REDI) journey. This inaugural survey will help us more systematically understand the demographic makeup of our investees, including the patterns and trends reflected in our investment decisions to ensure they are equitable. This survey will also help us understand how you define your own REDI efforts in the context of your organization.

The survey is divided into the following four sections:

1. **Investee Background Information**
2. **Demographic Information**
3. **REDI Self-Reporting**
4. **Feedback**

Section I of the survey (“Investee Background Information”) focuses on general background information about the organization.

Section II of the survey (“Demographic Information”) is split into three parts, Part (A), Part (B) and Part (C). Part (A) (titled “Racial Identity Demographics”) asks demographic information on race/ethnicity within the organization. Part (B) (titled “Gender Identity Demographics”) asks demographic information about gender within the organization. Part (C) (titled “Additional Information”) invites organizations to share information regarding other race/ethnicity or gender information, that was not listed in our survey, they collect. It also invites organizations to share other demographic or identifying information that they collect or think is important to collect systematically. **We also acknowledge that many organizations may collect this information using less detailed, or broader identities than those listed below. In these instances, please report counts on the identities for which you collect data – while all staff members should be accounted for in your reporting, not all race/ethnicity identities or gender identities need to be utilized.**

Section III of the survey (“REDI Self-Reporting Assessment”) is the self-reporting assessment portion of the survey. The open-ended questions in this section invite respondents to assess their organization across four dimensions of racial equity that Blue Meridian Partners has adopted in our organizational priorities.

Section IV of the survey (“Feedback”) requests any additional comments or information the organization would like to share regarding the survey. For example, organizations may share comments about the survey structure.

**Please note the race/ethnicity identities in this survey were chosen to be consistent with existing sector-relevant standards. Similarly, the gender identities below were chosen based on emerging best practices and extensive consultation with experts in this area. Though these categories were designed to be as inclusive as possible, we acknowledge that your organization may collect information on staff race/ethnicity and staff gender identities using different or more extensive standards. We encourage you to share these practices in Section IV titled “Feedback”.**

**I.** **Investee Background Information:**

1. Don’t need this question: Using the drop-down menu, please select your organization:
   1. This will be automatically selected when the user signs into the portal and won’t be visible in the list of questions
2. Please state the number of members in the organization’s **executive/leadership team** (**including** the CEO/ED)? Whole number

1. Please state the number of members (**including** the CEO/ED) on the organization’s **Board**. Whole number
2. Please state the number of **staff** employees in the organization (**including** the CEO/ED and the members of the executive/leadership team). Whole number

1. Thank you for providing this general information about your organization. Would you like to continue this survey and provide information regarding your organization’s demographic makeup? Yes, No (two options) – but with logic in the form

NOTE: Please select “yes” if you would like to continue this survey. Please select “no” if you would like to opt-out of the remainder of the survey. Selecting “no” will submit your existing responses to questions 1-4. As a reminder, your responses to this survey will not be used to make any individual grant decisions.

1. It would help us to understand why you are choosing not to continue this survey. Please provide as much information as you are comfortable sharing to explain your decision.
   1. Multi-line text box after user selects “No”

**II.** **Demographic Information:**

***This is an on-screen instruction for the user filling out the survey***

Section II of this survey is (divided into?) broken up into three parts, Part (A) Racial Identity Demographics and Part (B) Gender Identity Demographics. Part (A) asks demographic information on race/ethnicity within the organization. Part (B) asks demographic information about gender within the organization. Part (C) invites organizations to share what other race/ethnicity identity information or gender identity information or demographic/identifying information, not included in our survey, they collect systematically or think is important to collect systematically.

**A. Racial Identity Demographics**

1. Does the organization’s **CEO/ED** identify as a member of a racially underrepresented group in the U.S.? Please note that there is an opportunity to select a specific racial groups in the next question. For individuals whose answers you were not able to collect, please select “Unknown”.
   1. Yes, No, Unknown (3 options?)

1. Please specify the racial identity or identities of the organization’s **CEO/ED**? Please select all that apply: Asian, Black or African American, Indigenous, Latina/o/x, Multiracial, White, Other, Prefer Not to Answer, or Unknown.
   1. Multi-select option set
2. In the table below please provide the following for the organization’s **executive/leadership team** (**including** the CEO/ED):

* Number of members that identify as members of a racially underrepresented group in the U.S.
* Number of members that **DO NOT** identify as members of a racially underrepresented group in the U.S.
* Number of members that preferred not to answer
* Number of members whose answers you were not able to collect.

Note: Only one answer should be provided for any single member of the organization’s executive/leadership team. Please note that there is an opportunity to select a specific racial group in the next question.

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| **Racial Identity Categories** | **Number Of Executive/Leadership Members** |
| Identify as members of a racially underrepresented group | Whole number |
| **DO NOT** identify as members of a racially underrepresented group | Whole number |
| Prefer Not Answer | Whole number |
| Unknown | Whole number |

1. In the table below, please specify the racial identity or racial identities for each member of the organization’s **executive/leadership team** (**including** the CEO/ED). For each member, please select all that apply: Asian, Black or African American, Indigenous, Latina/o/x, Multiracial, White, Other, Prefer Not to Answer, or Unknown.

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| --- | --- |
| **Executive / Leadership Team Member(s)** | **Racial Identity / Racial Identities** |
| Member 1 Fill in – name field (single line of text | Multi-select option set |
| Member 2 Fill in – name field (single line of text | Multi-select option set |
| Member 3 Fill in – name field (single line of text | Multi-select option set |
| + add more members | Multi-select option set |

1. In the table below please provide the following for the organization’s **board** (**including** the CEO/ED):

* Number of members that identify as members of a racially underrepresented group in the U.S.
* Number of members that **DO NOT** identify as members of a racially underrepresented group in the U.S.
* Number of members that preferred not to answer
* Number of members whose answers you were not able to collect.

Note: Only one answer should be provided for any single member of the organization’s board. Please note there is an opportunity to select a specific racial group in the next question.

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| **Racial Identity Categories** | **Number Of Board Members** |
| Identify as members of a racially underrepresented group | Whole number |
| **DO NOT** identify as members of a racially underrepresented group | Whole number |
| Prefer Not Answer | Whole number |
| Unknown | Whole number |

1. In the table below, please specify the racial identity or racial identities for each member of the organization’s **Board** (**including** the CEO/ED). For each member, please select all that apply: Asian, Black or African American, Indigenous, Latina/o/x, Multiracial, White, Other, Prefer Not to Answer, or Unknown.

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| **Board Member(s)** | **Racial Identity / Racial Identities** |
| Member 1 Fill in – name field (single line of text | Multi-select option set |
| Member 2 Fill in – name field (single line of text | Multi-select option set |
| Member 3 Fill in – name field (single line of text | Multi-select option set |
| + add more members | Multi-select option set |

1. **(OPTIONAL):** In the table below, please provide the following for the organization’s **staff** (**including** the CEO/ED nor members of the executive/leadership team):

* Number of members that identify as members of a racially and/or ethnically underrepresented group in the U.S.
* Number of members that **DO NOT** identify as members of a racially and/or ethnically underrepresented group in the U.S.
* Number of members that preferred not to answer
* Number of members whose answers you were not able to collect.

Note: Only one answer should be provided for any single member of the organization’s board. Please note there is an opportunity to select a specific racial group in the next question.

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| **Racial Identity Categories** | **Number Of Staff Members** |
| Identify as members of a racially and/or ethnically underrepresented group | Whole number |
| **DO NOT** identify as members of a racially and/or ethnically underrepresented group | Whole number |
| Prefer Not Answer | Whole number |
| Unknown | Whole number |

**B.**  **Gender Identity Demographics**

1. Please select which of the following gender identity categories the organization’s **CEO/ED** identifies as: Cisgender, Transgender, Other Gender Identity, and Unknown. Only one of the four options may be selected. Please select “Unknown” for individuals who prefer not to answer or whose gender identity you were not able to collect. Multi-select option set
2. Please specify the gender identity of the organization’s **CEO/ED**? Please select all that apply: Cis Male, Cis Female, Non-Binary, Transgender, Other Gender Identity, Unknown. Please select “Unknown” for individuals who prefer not to answer or whose gender identity you were not able to collect. Multi-select option set
3. In the table below please provide the following information for the organization’s **executive/leadership team** (**including** the CEO/ED):

* Number of members that identify as cisgender
* Number of members that identify as transgender
* Number of members that identify as other (neither cisgender nor transgender)
* Number of members who prefer not to answer or whose gender identity you were not able to collect

Note: Only one answer should be provided for any single member of the organization’s executive/leadership team.

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| **Gender Identity Categories** | **Number Of Executive/Leadership Team Members Who Identify As This Gender Identity Category** |
| Cisgender | Whole number |
| Transgender | Whole number |
| Other Gender Identity | Whole number |
| Unknown | Whole number |

1. In the table below, please specify the gender identity or gender identities for each member of the organization’s **executive/leadership team** (**including** the CEO/ED). For each member, please select all that apply: Cis Male, Cis Female, Non-Binary, Transgender, Other Gender Identity, Unknown. Please select “Unknown” for individuals who prefer not to answer or whose gender identity you were not able to collect.

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| **Executive / Leadership Team Member(s)** | **Gender Identity / Gender Identities** |
| Member 1 Fill in – name field (single line of text | Multi-select option set |
| Member 2 Fill in – name field (single line of text | Multi-select option set |
| Member 3 Fill in – name field (single line of text | Multi-select option set |
| + add more members | Multi-select option set |

1. In the table below please provide the following information for the organization’s **board** (**including** the CEO/ED):

* Number of members that identify as cisgender
* Number of members that identify as transgender
* Number of members that identify as other (neither cisgender nor transgender)
* Number of members who prefer not to answer or whose gender identity you were not able to collect

Note: Only one answer should be provided for any single member of the organization’s Board.

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| **Gender Identity Categories** | **Number Of Board Members Who Identify As This Gender Identity Category** |
| Cisgender | Whole number |
| Transgender | Whole number |
| Other Gender Identity | Whole number |
| Unknown | Whole number |

1. In the table below, please specify the gender identity or gender identities for each member of the organization’s **Board** (**including** the CEO/ED). For each member, please select all that apply: Cis Male, Cis Female, Non-Binary, Transgender, Other Gender Identity, Unknown. Please select “Unknown” for individuals who prefer not to answer or whose gender identity you were not able to collect.

|  |  |
| --- | --- |
| **Board Member(s)** | **Gender Identity / Gender Identities** |
| Member 1 Fill in – name field (single line of text | Multi-select option set |
| Member 2 Fill in – name field (single line of text | Multi-select option set |
| Member 3 Fill in – name field (single line of text | Multi-select option set |
| + add more members | Multi-select option set |

1. **(OPTIONAL):** In the table below please provide the following information for the organization’s **staff** (**including** the CEO/ED and the members of the executive/leadership team):

* Number of members that identify as cisgender
* Number of members that identify as transgender
* Number of members that identify as other (neither cisgender nor transgender)
* Number of members who prefer not to answer or whose gender identity you were not able to collect

Note: Only one answer should be provided for any single member of the organization’s Board.

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| --- | --- |
| **Gender Identity Categories** | **Number Of Staff Members Who Identify As This Gender Identity Category** |
| Cisgender | Whole number |
| Transgender | Whole number |
| Other Gender Identity | Whole number |
| Unknown | Whole number |

**C.**  **Additional Information**

1. Does your organization collect more detailed or nuanced race/ethnicity identity information than is captured throughout the survey? Multi-line text box
2. What race/ethnicity identities does the organization use to collect information on staff? Multi-line text box
3. Does your organization collect more detailed or nuanced gender identity information than is captured in the categories above? Multi-line text box
4. What gender identities does the organization use to collect information on staff? Multi-line text box
5. If there is other demographic or identifying information that you collect or think is important to collect systematically please use the space below to share these insights. Multi-line text box

**III.** **REDI Self- Assessment**

There are many ways that principles of racial equity, diversity, and inclusion (“REDI”) can be integrated in our work and organizations. As a starting point, we are eager to learn more about how REDI principles are integrated in four areas of your work: organizational strategy, programs and services, measurement, evaluation and learning practices, and talent efforts.

1. To what extent does your organization integrate racial equity, diversity, and inclusion (“REDI”) principles in its **organizational strategy** (for example through a publicly articulated commitment to REDI in your mission, explicit REDI priorities into your organizational strategy and operational plans, mechanisms to measure short- and long-term progress on strategic REDI priorities, etc.)?
   1. Option set

***Answer Option:*** Five point Extent Scale: Completely; To a Large Extent; Moderately; Slightly; Not at All; Cannot Assess/Not Applicable

1. If you answered “slightly” or higher please provide a few examples to help illustrate how racial equity, diversity, and inclusion are reflected in **your organizational strategy**. (open ended). If you responded “not at all or cannot assess”, please share more about your experience.
   1. Multi-line text field
2. To what extent does your organization integrate racial equity, diversity, and inclusion (“REDI”) principles in the **design and delivery of programs and services** (for example by designing and customizing services and supports to meet the unique needs and assets of diverse constituents, by explicitly focusing on addressing disparities in racial/ethnic programmatic outcomes; by routinely assessing and refining programs integrating constituent feedback)?
   1. Option set

***Answer Option:*** Five point Extent Scale: Completely; To a Large Extent; Moderately; Slightly; Not at All; Cannot Assess/Not Applicable

1. If you answered “slightly” or higher, please provide a few examples to help illustrate how racial equity, diversity, and inclusion are reflected in your **design and delivery of programs and services.** (open ended) If you responded “not at all or cannot assess”, please share more about your experience.
   1. Multi-line text field
2. To what extent does your organization integrate racial equity, diversity, and inclusion (“REDI”) principles in your **learning, evaluation, and measurement practices** (for example through data disaggregation and constituency feedback, using data to hold yourself accountable for equitable strategies, operations, and programmatic performance)?
   1. Option set

***Answer Option:*** Five point Extent Scale: Completely; To a Large Extent; Moderately; Slightly; Not at All; Cannot Assess/Not Applicable

1. If you answered “slightly” or higher, please provide a few examples to help illustrate how racial equity, diversity, and inclusion are reflected in your **learning, evaluation, and measurement practices.** (open ended) If you responded “not at all or cannot assess”, please share more about your experience.
   1. Multi-line text field
2. To what extent does your organization integrate racial equity, diversity, and inclusion (“REDI”) principles in your **talent management practices** (for example by focusing on hiring, retaining and promoting of individuals who identify as BIPOC – including Board members, by designating a leadership team to execute the progress on organizational diversity and racial equity strategies, by engaging external advisors to support ongoing advancement of you REDI work)?
   1. Option set

***Answer Option:*** Five point Extent Scale: Completely; To a Large Extent; Moderately; Slightly; Not at All; Cannot Assess/Not Applicable

1. If you answered “slightly” or higher, please provide a few examples to help illustrate how racial equity, diversity, and inclusion are reflected in your **talent management practices.** (open ended) If you responded “not at all or cannot assess”, please share more about your experience.
   1. Multi-line text field

**IV. Feedback**

1. Please provide any comments or feedback you have regarding the questions in this survey as well as the survey as a whole.
   1. Multi-line text field