BENCHMARK YOUR JOURNEY

THE DIVERSITY EQUITY & INCLUSION SELF-ASSESSMENT

FOR ORGANIZATIONS

Hiring & Recruiting

Working Expectations & Policies

Product & Branding

Cultural Practices & Processes

Meeting Practices

Employee Support Mechanisms

Listen & Learn

THE CLU STUDIO

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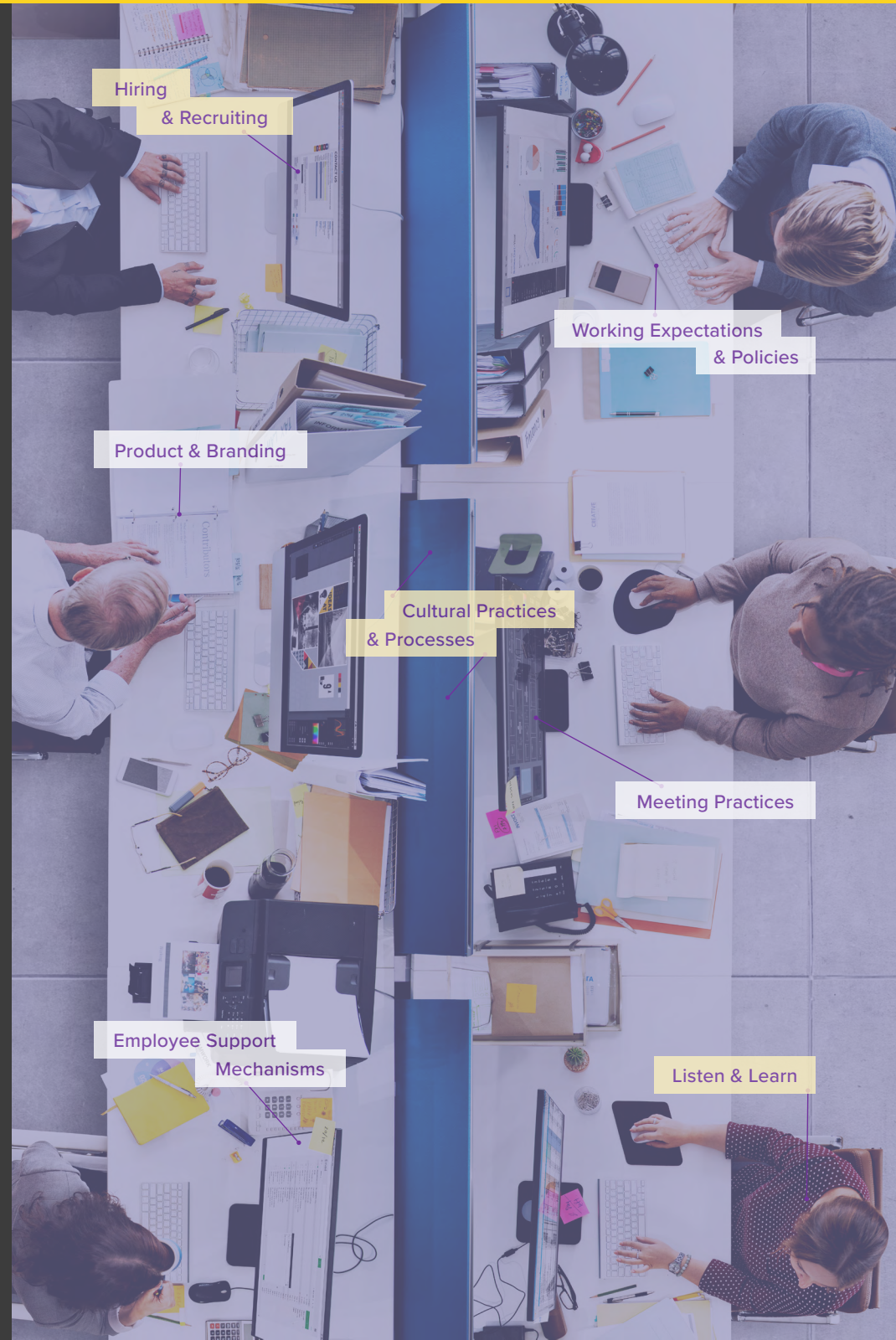
THE DIVERSITY EQUITY & INCLUSION SELF-ASSESSMENT

The Diversity Equity & Inclusion Self Assessment is a guide to help you assess your organization's D&I strengths and weaknesses. The self-assessment is designed for HR and D&I professionals to benchmark their organization's diversity equity & inclusion (DEI) journey, and identify areas for improvement. It's not intended to be a pass/fail grading instrument, but rather a tool that helps assess progress toward institutionalizing DEI into organizational practice

How to Use the Diversity Equity & Inclusion Self Assessment
1. Examine each action item and check off the ones your organization is currently doing today.

2. Assess the priority and level of effort involved in addressing each unchecked action item.

3. Share the self-assessment with colleagues for feedback.

Authors
The Diversity Equity & Inclusion Self Assessment is a collaboration between The CLU Studio and Equalicert in pursuit of their shared mission of supporting organizations in creating more diverse and inclusive workplaces. The CLU Studio creates games and experiences to help organizations address unconscious bias, and Equalicert helps organization's measure and institutionalize DEI.

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GET STARTED

HR / PEOPLE OPERATIONS

Join a DEI Community!
Join a Slack or LinkedIn community to discuss DEI questions and learn in a community of other practitioners. Consider joining Equalicert Champions, a Slack community to connect with other DEI professionals, get advice, and learn new techniques.

LEADERSHIP

Demonstrate Commitment to DEI
Inform your organization that you are committed to DEI and plan to demonstrate your commitment by forming a DEI Council for transparency and accountability.

LISTEN & LEARN

LEADERSHIP

Survey your Employees
To create a sense of belonging, seek first to understand your employees and their perspective on DEI. Use a survey tool or communication platform to collect anonymous feedback.Topics should include psychological safety, perception of DEI in the organization, and additional insights.

Understand Implicit Bias
Educate employees about unconscious bias. The CLU Studio offers an Unlocking Awareness Workshop designed to help employees recognize their biases and blind spots.

Interrupt Bias as a Leader
Every person in the organization can make an impact on building a more diverse and inclusive workplace. Unconscious Bias and How to Disrupt it is a great resource in understanding how bias works.

Assess Employee Feedback
Building a diverse, equitable, and inclusive company takes time, but starts with decisions and behaviors modeled by leadership. As a management team, briefly share and discuss the constructive feedback from employees to identify any quick wins or ideas. Document any ideas that may overlap with our recommendations.

"Unconscious bias is a problem most organizations don't know they have. With no formal or sustained mechanism as a check, it flourishes in micro aggressions, the defense of culture fit, passive aggressiveness, dark humor, and sarcasm."

— Steffon Isaac, Founder, The CLU Studio

WORKING EXPECTATIONS & POLICIES

HR / PEOPLE OPERATIONS

Define Working Hours Policy
Supporting a flexible working hours culture is inclusive, but set expectations for employees around timeframes that require synchronous work or availability. Be specific enough to account for expectations at the company-level vs department level where appropriate, and consider employees who may work across multiple time zones. A clearly defined policy should include:

- When **company-level meetings** can occur

- When **department/team-level meetings** can occur

- When employees are expected to be **available for communication** via Slack/email (and when it is ok not to be available outside of emergencies)

- **On-call availability shifts** are clearly documented and fairly balance work across the team

Support Flexible Working Hours
Offer flexible working hours to employees where possible, and measure employee success on output as opposed to rewarding employees for simply being present at the office or online.

"Defining working hours and expectations of availability will make your workplace instantly more accessible. Set the tone to help all employees understand when they need to be available."

— Rachel Dowling, Founder/CEO, Equalicert
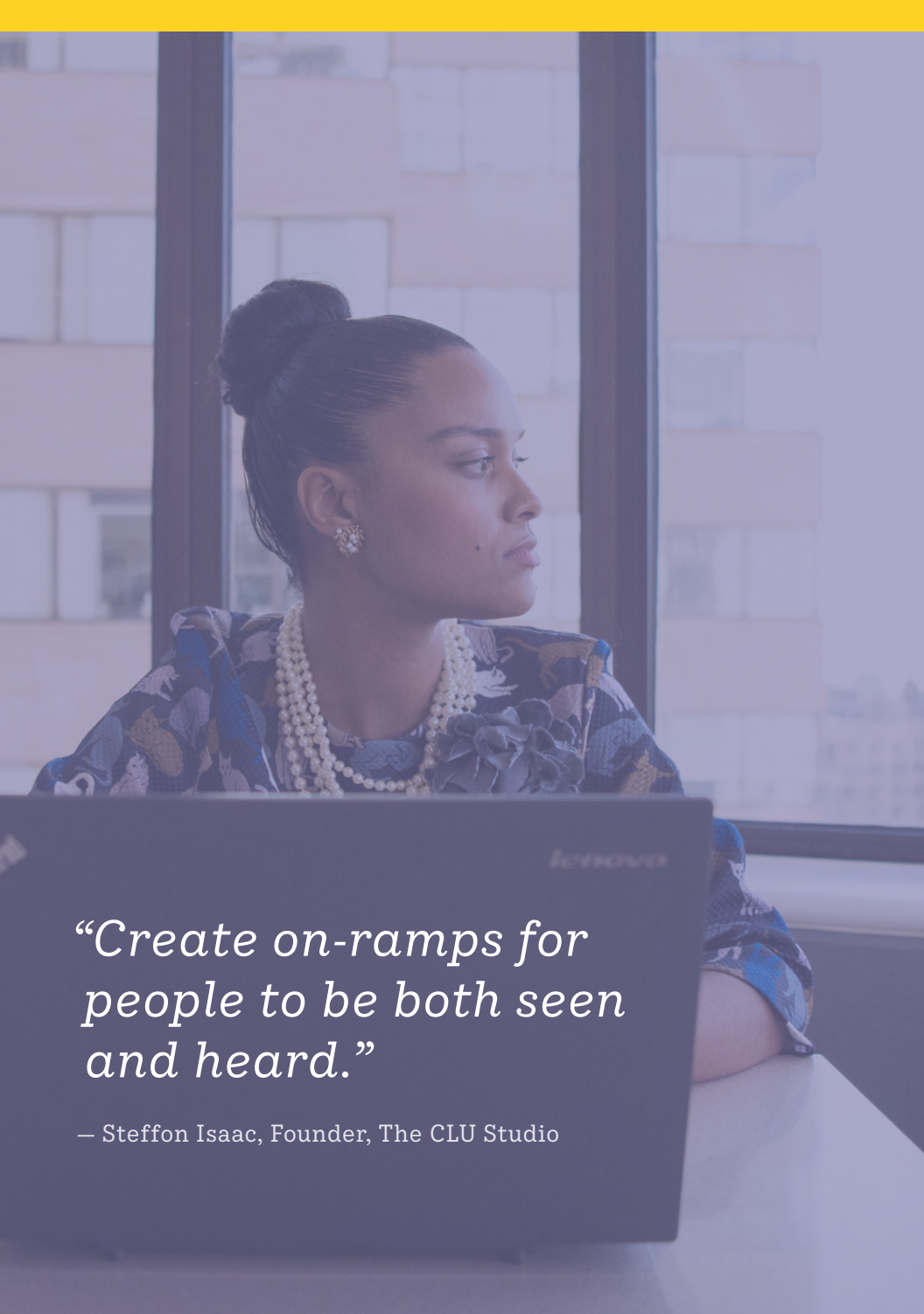
EMPLOYEE SUPPORT MECHANISMS

HR / PEOPLE OPERATIONS

Anonymous Employee Feedback Channels
Create a mechanism for employees to voice feedback anonymously through a survey tool.

Whistleblower / Code of Conduct Mechanisms
Create a mechanism for employees to report Code of Conduct issues (such as illegal activity or sexual harassment). This mechanism should not be anonymous in the case of legal investigation, however, policies should be documented to ensure employee indemnification.

"Create on-ramps for people to be both seen and heard."

— Steffon Isaac, Founder, The CLU Studio

PRODUCT & BRANDING

MARKETING / HR

Company Mission / Inclusion Statement
Customers and stakeholders care about inclusivity, and many will use your website to assess how you prioritize DEI. Ensure your organization has either a statement of inclusion or is evidenced by your organization's mission statement.

Careers Page Statement
According to McKinsey, nearly 4 out of 10 jobseekers decided not to pursue an opportunity due to a perceived lack of inclusion.

Your Careers page is a reflection of what is important to your employees and potential candidates. Ensure your Careers page has demonstrated a commitment to an inclusive place to work.

Earn 3rd Party Accreditation
Earn a certification of your organization's friendly and inclusive atmosphere to verify that you have taken steps and had them checked by outside counsel. Equalicert offers a certification, which dovetails well with this self-assessment.

"Your public-facing communication is an opportunity to demonstrate your commitment to diversity and inclusion."

— Rachel Dowling, Founder/CEO, Equalicert

PRODUCT & BRANDING

PRODUCT / MARKETING

Ensure Accessibility
If your organization sells products, ensure your User Experience considers accessibility in their design process.

Accessibility barriers can make it difficult for users with low vision or limited mobility to access your product.Improving access ensures an enjoyable and equitable experience, and protects your organization from legal risks.

Representation in Branding
Examine the diversity in your marketing, and make it clear that you celebrate all users and have a diverse representation on your website.

Include a review in your content production process that materials regarding your product demonstrate a diverse group that is reflective of your customers.

Use Inclusive Technical Language
If your organization has a style guide for technical documentation, consider reviewing it to identify any opportunities to make language more inclusive.

MEETING PRACTICES

ALL EMPLOYEES

Balance Speaking Time with Equal Time
Traditional meeting formats favor extroverts who may be more naturally comfortable speaking up. Gently ask for feedback from individuals who may be speaking less frequently in meetings.

For supported video conferencing tools, have your team leverage Equal Time by Equalicert to better visualize speaking time and receive recommendations.

Before Meetings
Consider following areas:

- **Schedule Inclusively:** Ensure all meetings are scheduled within the expected time frames set for employees. Additionally, companies operating in a hybrid environment should ensure communication tools such as Zoom, Microsoft Teams, WebEx or Google Meet are included for remote employees

- **Include All Participants:** Invite the appropriate individuals to the meeting, and for non-required attendees mark them as optional accordingly using your calendar tools.

- **Share Agendas:** Meeting owners should circulate agendas in advance to allow for feedback and preparation. This not only ensures time will be focused, but helps more introverted employees provide any feedback in advance in writing.

- **Include Remote Employees:** Where possible, ensure meeting rooms include video conference equipment to optimize for the engagement of remote employees. Meeting owners should include a video conferencing link.

"Meetings are a prime place where inclusion or exclusion occurs. Help your colleagues to have a more inclusive mindset with tools that support self-awareness."

— Rachel Dowling, Founder/CEO, Equalicert

MEETING PRACTICES

ALL EMPLOYEES

During Meeting

- **Monitor Speaking Time:** Leverage Equal Time to get better insight into how much speaking time participants take. Take the opportunity to solicit feedback or ask questions if individual contributions to the conversations may be underrepresented.

- **Discourage Interruptions:** Support a culture to minimize interruptions so participants are able to complete their thought process.

- **Acknowledge Ideas:** Verbally credit and acknowledge the ideas of others when you build on them.

- **Take Notes:** Document key discussion decisions and action items for who may miss the meeting. This may also support individuals who have a preference for written communication, and reduce ambiguity of meeting outputs.

- **Rotate Admin Tasks** Create a fair rotation for note taking, to avoid scenarios where women or underrepresented employees get stuck with extra clerical work.

- **Embrace Conflicting Opinions:** Avoid groupthink by soliciting conflicting opinions if consensus comes too easily. Create a safe space for participants to express dissent during the meeting or offline.

- **Support Anonymous Channels:** For larger meetings such as Town Hall or Company Presentation, allow participants to ask questions or provide feedback in anonymous ways.

"Start every meeting with intention. Think about the outcomes you want to create and the feeling you want to leave people with."

— Rachel Dowling, Founder/CEO, Equalicert

MEETING PRACTICES

ALL EMPLOYEES

After Meetings

- **Send Meeting Recap:** Meeting owner should ensure delegated notetaker sends out meeting notes to include participants who may have missed the meeting.

- **Assess Participant List:** Identify if any decisions or topics have changed who needs to be in the meeting, and adjust attendees accordingly to be sensitive to everyone's calendar time.

CULTURAL PRACTICES & PROCESSES

ALL EMPLOYEES

Support or Start ERGs (Employee Resource Groups)
If your organization has enough employees who identify with a particular group, consider starting or supporting employees to form an ERG (Employee Resource Group). ERGs help employees find a sense of community, especially for underrepresented groups. An ERG can be started even if just two employees are highly passionate about forming a group and have sufficient ownership and support to create one.

HR / PEOPLE OPERATIONS

Pronoun Usage: Add Pronouns as part of your core communication practices to support how employees identify. Ensure pronouns are added to the following areas:

- Company Signature

- Messaging (e.g. Slack, Teams, Skype, etc.)

- Video Conferencing (e.g. Zoom, WebEx, Teams, etc.)

"Culture shifts take time because Culture doesn't scale. It moves horizontally, person to person."

— Steffon Isaac, Founder, The CLU Studio

CULTURAL PRACTICES & PROCESSES

HR / PEOPLE OPERATIONS

Inclusive Social Events
Be mindful of events that could exclude specific groups, and most importantly solicit employee feedback pre/post-employee events. For example, events that require an athletic component or are alcohol-centric may exclude certain groups. For teams that are operating in a hybrid environment, identify activities that can engage everyone remotely or events that all team members can travel to.

Quick Tips:

- Get feedback in advance

- Form event committees that are diverse

- Avoid appealing to a select group of preferences

- Be clear on intentions or themes for the event (e.g. welcoming new hires, celebrating a company milestone, etc.)

- Provide notice when events are after-hours or on weekends

- Consider varying times beyond happy hours (such as breakfast, afternoons, lunch, etc.)

- Avoid alcohol being the sole focus of events

- Change up locations

- Include educational opportunities where possible with cultural events

- Be cognizant of events that may be overly physical to avoid risks with sexual harassment or excluding those with physical disabilities

"What employees really want is an environment where they can be their best selves and deliver their best work."

— Steffon Isaac, Founder, The CLU Studio

HIRING & RECRUITING

HR / PEOPLE OPERATIONS

Use Diverse Job Boards
Advertise your open roles on job boards that attract a diverse audience such as women, BIPOC, disabled persons, LGBTQ+, veterans, parents, etc.

Reduce Resume Review Bias
Headshots and images of candidates on resumes may introduce bias in hiring. Update your hiring procedure to request that candidates do not send resumes with images of themselves.

Job Description Inclusion Statement
To reinforce your commitment and ensure consistency, include your statement of inclusivity on all your job descriptions for new hires.

Avoid Requesting Salary Info
Requesting prior salary information is illegal in several states in the United States. Asking for prior salary allows prior compensation to unnecessarily be a factor in determining a candidate's fit for the role, or to benchmark your offer. Differences in starting salary is where most wage gaps occur.

Ensure your team members involved in hiring do not ask for salary-related inputs during the evaluation process.

"The key is to set realistic candidate expectations, and then not to just meet them, but to exceed them—preferably in unexpected and helpful ways."

— Steffon Isaac, Founder, The CLU Studio

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HIRING & RECRUITING

HR / PEOPLE OPERATIONS

Use Diverse Hiring Panels
Include diverse representation on hiring panels where possible to mitigate unconscious bias. Include peers and employees who may not be in the management reporting chain to also evaluate candidates for feedback.

Assess Multiple Candidates Simultaneously
Research from Harvard Kennedy School Professor Iris Bohnet shows empirically that assessing multiple candidates at once reduces bias in selection.

Hiring managers are more likely to choose candidates with the best skill match as well. Managers who look at multiple resumes and interview multiple candidates for a single role tend to rely less on subjective measures like hiring people who they "just like" or who look like them.

Avoid running interviews and making a Yes/ No decision with one candidate at a time, if you can avoid it.

Assess Candidates Objectively
Don't assess candidates subjectively (e.g. "culture fit"), and ensure candidates are evaluated based on their skills. To combat this ensure all new positions include a clear rubric or requirements that all interviews are consistently evaluating hires against.

"In order to create a vibrant and creative company, prioritize creating a diverse candidate pool. You will not have a diverse candidate pool by accident. Seek it out actively."

— Rachel Dowling, Founder/CEO, Equalicert

HIRING & RECRUITING

HR / PEOPLE OPERATIONS

Salary Transparency
Publish salary ranges externally for roles. Not only does this set candidate expectations, allow out-of-budget candidates to self-select out, but also proactively adheres to requirements in states such as Colorado and California that have made salary ranges a legal requirement. Additionally, research has shown underrepresented groups are more adversely impacted in salary negotiations which further contributes to pay equity issues.

Allow Internal Applicants for Promotions
Avoiding "external-only" hires ensures internal employees have opportunities to grow and reduces the risk of employee attrition. Open up each position to internal staff and promote the opportunity internally.

"Implement inclusive practices in your new hire decision-making panels. Set requirements for the diversity in your hiring team to create more balanced hiring decisions, and reduce the impact of 'looks like me' bias."

— Rachel Dowling, Founder/CEO, Equalicert