ASSESS

Inclusion Counts Assessment Rubric

A diverse, equitable and inclusive workplace refers to a workplace in which all individuals feel seen, valued, respected and engaged not regardless of — but with consideration and appreciation for differences.

Companies that have strong Diversity, Equity & Inclusion (DEI) practices recognize and value differences such as gender, gender-identity, race, ethnicity, nationality, age, faith, sexual orientation, ability, and class and also respect personal traits such as life experience, career choices, educational background and communication style that are influenced by their identities and experiences.Diversity stretches beyond representation and includes meaningful & inclusive dialogue, equitable policies and purposeful systems of acknowledgement and recognition that intentionally support employee engagement, satisfaction and retention. DEI should be seen as an active process of integration, adaptation and ongoing change and be responsive to the needs of all employees, staff and external stakeholders. The starting point for any DEI initiative is to first understand how your workplace is currently performing across key areas. This rubric should take between 15-20 minutes to complete and covers areas and central indicators of inclusion & diversity in an organization such as: **Representation, Engagement & Interactions** and **Policies & Systems.**

This rubric is subjective and not a substitute for qualitative DEI auditing of existing levels of DEI such as interviewing sample staff and engaging in dialogue. This rubric is a point for reflection and will allow you to begin identifying DEI gaps, establishing values and setting objectives.

REPRESENTATION:				
	1	**Y/N**	**3**	**1-4**
1	**EMPLOYEES**: Are your employees diverse? (gender, gender-identity, race, ethnicity, nationality, age, faith, sexual orientation, ability, and class)		To what extent is your organization actively recruiting diverse individuals?	
	Are your employees diverse? (life experience, career choices, educational background and communication style)		To what extent is your organization actively promoting diverse individuals?	
2	**LEADERSHIP**: Is your organization's leadership diverse? (gender, gender-identity, race, ethnicity, nationality, age, faith, sexual orientation, ability, and class)		To what extent is your organization actively recruiting diverse individuals in leadership?	
	Is your leadership diverse? (life experience, career choices, educational background and communication style)		To what extent are your leadership hires made from internal promotion vs. external hire?	
3	**BOARD OF DIRECTORS**: Is your organization's board of directors diverse? (gender, gender-identity, race, ethnicity, nationality, age, faith, sexual orientation, ability, and class)		To what extent is your organization actively recruiting diverse individuals to your board of directors?	
	Is your Board of Directors diverse? (life experience, career choices, educational background and communication style)		To what extent do your chaired board & leadership positions include diverse representation? (gender, gender-identity, race, ethnicity, nationality, age, faith, sexual orientation, ability, and class, field, life experience, etc.)	
			To what extent has your Board of Directors recruitment team defined what 'highly qualified' means to your organization and what weights have been established to include inherent and acquired diversity within the definition?	
4	**COMMITTEES & WORKING GROUPS**: Are your opt-in committees and working groups diverse (this includes committee groups, wellness teams, action-teams, holiday planning groups, etc.)?		To what extent is your organization actively including diverse individuals in these groups or actively seeking diverse representation to support these groups?	

Inclusion Counts Rubric Score is based on a scale from 1-4, 1 being low and 4 being high*

REPRESENTATION:

#	1	Y/N	3	1-4
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			To what extent do your chaired board & leadership positions include diverse representation? (gender, gender-identity, race, ethnicity, nationality, age, faith, sexual orientation, ability, and class, field, life experience, etc).	
	Is your Board of Directors diverse? (life experience, career choices, educational background and communication style)		To what extent has your Board of Directors recruitment team defined what 'highly qualified' means to your organization and what weights have been established to include inherent and acquired diversity within the definition?	
4	**COMMITTEES & WORKING GROUPS**: Are your opt-in committees and working groups diverse (this includes committee groups, wellness teams, action-teams, holiday planning groups, etc.)?		To what extent is your organization actively including diverse individuals in these groups or actively seeking diverse representation to support these groups?	

5	**VOLUNTEERS**: Are your volunteers diverse?

To what extent do your leadership positions within committees & working groups include diverse representation? (gender, gender-identity, race, ethnicity, nationality, age, faith, sexual orientation, ability, and class, company position, etc.)

To what extent are you actively recruiting diverse individuals in volunteer roles?

To what extent do your volunteers match the community or population you serve?

To what extent do your volunteer policies (background checks, certifications, etc.) disqualify individuals from matching the population you serve? (Mark 4 - does not disqualify, Mark 1 - disqualifies often)

6	**DONORS**: Are your donors diverse?

To what extent are you actively seeking funding from diverse individuals, corporations or foundations?

To what extent is your awareness of what other civic & social causes individuals, corporations or foundations support? (i.e. political affiliations, etc.)

To what extent do your individual, corporate and foundation represent your company philosophy on diversity, equity & inclusion (DEI) for all?

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7	**MARKETING**: Are your marketing materials diverse? (this includes imagery and voice in promotional materials, website, newsletters, annual reports, etc.)	To what extent do your marketing materials and imagery represent diversity?
		To what extent do you utilize a cultural calendar in observance and acknowledgement of your staff & communities you serve?
		To what extent are diverse individuals from within your company featured in external promotional material (featured blogs, videos, articles, etc.)?
8	**FACILITIES:** Are your facilities and collateral within your facilities diverse? (this includes books, imagery, meeting foods served, etc.)	To what extent do your facilities and collateral within your facility represent diverse depictions?
		To what extent do your foods & beverages served and sold at staff meetings or organization-sponsored events celebrate diverse cultures or make accommodations for cultural dietary needs?
		To what extent are your facilities accessible to all? (differently-abled individuals, gender-inclusive bathrooms, etc.)

ENGAGEMENT & INTERACTIONS:

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9	**L&D:** Do new employees receive professional learning on diversity, equity & inclusion within the onboarding process? (this includes unconscious bias training, diversity philosophy training, cultural competency training, etc.)	To what extent do new employees receive professional learning on diversity, equity & inclusion within the onboarding process?

#	Item	
10	**L&D:** Do existing staff receive ongoing professional learning on diversity, equity & inclusion?	To what extent do diverse individuals participate in facilitating or leading the onboarding process? (welcome, training, ongoing coaching, etc.)?
		To what extent do staff receive professional learning opportunities on diversity, equity & inclusion?
		To what extent is DEI training geared towards application to the community you serve?
		To what extent is DEI professional development geared internally, to employee relationships, belonging & communication?
11	**L&D:** Do existing staff receive opportunities to opt-in to membership organizations that provide guidance, advice or training on diversity issues to further their professional development/ application of their work? (This includes participating in forums, seminars, etc.)	To what extent do existing staff receive opportunities to participate in opt-in opportunities related to professional advancement of DEI initiatives?
12	**L&D:** Does your organization have a diversity, equity or inclusion committee that meets at least 4 times a year?	To what extent do your employees have agency in coordinating the implementation of DEI policies and practices within your organization?
		To what extent does your organization use a continuous improvement process to coordinate the implementation of ongoing DEI policies & practices within your organization?
13	**INTERACTIONS:** Do employees feel safe (physically) from racism, sexism, heterosexism, classism, appearancism, ageism, ableism, faithism in the workplace?	To what extent are your employees comfortable addressing physical harassment or threats to physical safety related to race, gender, gender-identity, sexual orientation, class, appearance, ability or faith?
14	**INTERACTIONS:** Do employees feel safe (emotionally) from racism, sexism, heterosexism, classism, appearancism, ageism, ableism, faithism in the workplace?	To what extent are your employees comfortable addressing emotional or social grievances related to race, gender, gender-identity, sexual orientation, class, appearance, ability or faith?
15	**INTERACTIONS:** Is communication (verbal or nonverbal) between employees culturally affirming?	To what extent is your employee communication free of cultural insensitivity or microaggressions?

POLICIES & SYSTEMS:

#	Question	Sub-question		
16	**HIRING**: Does your company attract diverse candidates?	To what extent does your company source candidates from diverse pools (diversity platforms, diverse career fairs, etc.)		
		To what extent do your company literature, advertising and imagery used at recruitment fairs depict diverse individuals?		
		To what extent does your commitment to diversity & equity statements explicitly list marginalized identities (black, indigenous, gender, gender-identity, etc.)?		
17	**HIRING**: Is your hiring process equitable?	To what extent does your hiring process eliminate opportunities for bias (stripping candidate names or details relating to characteristics protected under equality legislation, school or university)?		
		To what extent do cultural fit interviews influence your hiring process? (We use cultural fit interviews - MARK 4, We don't use cultural fit interviews - MARK 1)		
		To what extent has your company defined what 'highly qualified' means to your organization and what weights have been established to include inherent and acquired diversity within the definition?		
18	**PRACTICE**: Does your organization have a written commitment to diversity statement?	To what extent does your committment to diversity statement explicitly call-in marginalized populations, including individuals who identify as Black, Indigenous, Gay, Lesbian or Transgender?		
		To what extent is your commitment to diversity statement explicitly listed in job postings and opportunities?		
		To what extent is your commitment to diversity & equity shared externally (on your website, etc.)?		
19	**POLICY**: Does your organization have a Diversity, Equity & Inclusion policy in your employee handbook?	To what extent does your organization have a clearly-defined approach to positively resolve diversity, equity & inclusion grievances amongst staff?		

#	POLICY / PRACTICE	Question
		To what extent are diversity, equity & inclusion grievances amongst staff handled with an employee-centered approach (reflective & restorative)?
20	**POLICY**: Does your company have mechanisms in place (wellness policy) to support the health and well-being of diverse staff?	To what extent do your wellness policies address emotional support and crisis-management for individuals affected/ effected by culturally-related events? (holidays, political movements, voting, civic dialogue etc.)
		To what extent does your policy include reinforcement of equitable work-life balance for all, including access to: voting time-off, personal time-off, maternity, paternity, etc.
21	**POLICY**: Is your company dress code culturally appropriate?	To what extent is your company dress code culturally appropriate and inclusive? (does not include restrictions that exclude employees with disabilities, varying hair types or styles, cultural or religious-based clothing, target a specific gender, etc.)
		To what extent is meeting your company dress code financially accessible to your employees?
		To what extent does your employee engagement survey explicitly ask questions related to perceptions of diversity, equity & inclusion?
22	**PRACTICE**: Does your organization implement Employee Engagement Surveys?	To what extent are you tracking your Net Promoter Score as it relates to diversity, equity & inclusion initiatives?

To what extent does your organization utilize feedback gathered from staff on Employee Engagement surveys?					
To what extent do staff have opportunities to provide feedback on diversity, equity & inclusion on an on-going basis?					
To what extent does your employee engagement survey explicitly ask questions related to perceptions of diversity, equity & inclusion?					
To what extent are you tracking your attrition as it relates to company diversity/ demographics?					
To what extent does your organization utilize feedback gathered from staff from exit surveys & interviews?	23	**PRACTICE**: Does your organization implement exit surveys or exit interviews?			
To what extent have you been on-target for reaching your DEI goals within your KPI cycle?	24	**PRACTICE**: Does your organization track DEI initiatives within a KPI cycle?			