

# Inclusion, Equity, and Justice Self-Assessment Toolkit

The following self-assessment tool has been adapted for use by Crafted For All from the Global Diversity, Equity, & Inclusion Benchmarks (GDEIB) with the permission of the authors. The tool provides a framework for evaluating your current organizational inclusion, equity, and justice (IEJ) efforts and discovering areas of greatest opportunity and need for change.

## How to Use This Tool

Conduct an honest evaluation of activities across the organization to determine which of the five stages of progress detailed below best describes your current level of activity in each category of business operations that you choose to evaluate. These stages of progress are described below.

### Stages of Progress

**Stage 1: Inactive** - No IEJ work has begun; progress toward greater diversity via an inclusive, equitable, and just culture are not explicitly part of the organization's goals.

**Stage 2: Reactive** – The organization has a compliance mindset and IEJ efforts are primarily undertaken in order to comply with relevant laws or in response to social pressures.

**Stage 3 – Proactive** – The organization has a clear awareness of the value of IEJ and has begun to implement IEJ practices systemically.

**Stage 4: Progressive** – The organization is implementing IEJ systemically and is beginning to show improved results and outcomes.

**Stage 5: Best Practice** – The organization is demonstrating best practices, achieving successful results and outcomes, and serves as an exemplar for other organizations.



## The Assessment Areas

The self-assessment grid on the page 4 includes 12 suggested areas for assessment. You may exclude those that don't apply or add others to meet your needs. Below is a brief description of what you should be assessing in each area.

**Vision and Alignment** – Assess the degree to which the organization has developed an actionable IEJ vision that is aligned with overall organizational goals and business objectives.

**Structure and Implementation** – Assess the degree to which IEJ is built into day-to-day business structures (practices and policies), resourced, and supported by the organization's overall operations.

**Leadership & Accountability** – Assess the degree to which IEJ is supported and championed by organizational leaders and to which leadership is held accountable to producing positive IEJ outcomes.

**Pipeline Development & Recruitment** - Assess the degree to which pipeline development and recruitment strategies reflection inclusive, equitable, and just design and enable the organization to recruit a qualified workforce that reflects the diversity of the surrounding community.

**Retention, Development, & Advancement** - Assess the degree to which retention, development, and advancement strategies produce equitable outcomes and allow the organization to leverage its existing diversity for positive outcomes.

**Assessment & Research** - Assess the degree to which the organization utilizes assessment and research to support the achievement of positive IEJ outcomes.

**Learning and Skill Development** - Assess the degree to which the organization engages in ongoing learning and skill development in IEJ topics and to which IEJ is integrated into all applicable learning and skill development opportunities.

**Internal Communications** – Assess the degree to which the organization embeds its commitment to IEJ in internal communications.

**Marketing & External Communications** – Assess the degree to which the organization embeds its commitment to IEJ in marketing and external communications.

**Community Relations & Social Responsibility** – Assess the degree to which the organization engages diverse stakeholders in its commitment to social responsibility and community engagement activities.

**Products, Services, Events & Spaces** – Assess the degree to which the organization embeds its commitment to IEJ in internal communications products, services, events, and spaces.

**Supplier & Partner Diversity** - Assess the degree to which the organization leverages its procurement activity and other partnerships to further IEJ outcomes.

## Using Level-Ups

The level-ups that begin on page 5 provide concrete examples of **indicators** and **strategies** that are typical of each stage in each area of organizational operation. Level-ups answer the question, "what does each stage actually *look* like for each of the categories of activity on the self-assessment tool?"

Once your organization has used a self-assessment process to determine which stage represents its current IEJ efforts in pipeline development and recruitment, these level-ups can be used to strategically plan and improve your organizational efforts in this area. You should consider progressing through each stage one by one, rather than attempting to make large leaps (from stage 2 to stage 5, for example). Each stage requires buy-in, allocation of resources, and cultural shifts that may take time to become established.



# Self-Assessment Grid

Category of Organizational Activity	Stage 1 Inactive	Stage 2 Reactive	Stage 3 Proactive	Stage 4 Progressive	Stage 5 Best Practice
Vision and Alignment					
Structure and Implementation					
Leadership and Accountability					
Pipeline Development and Recruitment					
Retention, Development, and Advancement					
Assessment and Research					
Learning and Skill Development					
Internal Communications					
Marketing and External Communications					
Community Relations and Social Responsibility					
Products, Services, Events and Spaces					
Supplier and Partner Diversity					

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# Vision and Alignment Level-Ups

Once your organization has assessed the degree to which the organization has developed and embraced an actionable IEJ vision that is aligned with overall organizational goals and business objectives, you can look to level up. Use the indicators and strategies at the stages above your current stage to guide your efforts moving forward.

STAGE 1	<p><u>Indicators</u></p> <ul style="list-style-type: none"> <li>• There is no IEJ vision, strategy, imperative, business case, goals, policies, principles, or program.</li> <li>• There is no explicit or implicit connection between IEJ and the vision, mission, and goals of the organization.</li> </ul>
STAGE 2	<p><u>Indicators</u></p> <ul style="list-style-type: none"> <li>• IEJ policies have been adopted primarily to meet compliance requirements and prevent damaging legal action or publicity.</li> <li>• Diversity is narrowly defined, referring only to conspicuously underrepresented demographic groups.</li> <li>• If IEJ vision and strategy exist, they are limited to human resource functions.</li> </ul> <p><u>Strategies</u></p> <ul style="list-style-type: none"> <li>• The desire to increase diversity in the workforce, customer base, and brand identity has been expressed publicly.</li> </ul>
STAGE 3	<p><u>Indicators</u></p> <ul style="list-style-type: none"> <li>• Diversity is broadly defined to include a range of identities, experiences, and perspectives.</li> <li>• A compelling IEJ vision, strategy, and business case has been developed and communicated to all employees that describes the multiple ways that individuals, teams, and the organization benefit from IEJ.</li> </ul> <p><u>Strategies</u></p> <ul style="list-style-type: none"> <li>• IEJ qualitative and quantitative goals that include input from a variety of internal and external stakeholders are being developed.</li> <li>• The organization is systematically examining its systems, practices, and organizational culture and is working to create strategies to reduce barriers to IEJ.</li> </ul>
STAGE 4	<p><u>Indicators</u></p> <ul style="list-style-type: none"> <li>• IEJ is well integrated into the organization's overall business strategy.</li> <li>• Most employees demonstrate competencies that help achieve the IEJ strategy.</li> <li>• Most leaders acknowledge that IEJ is important for contributing to the success of the organization.</li> </ul> <p><u>Strategies</u></p> <ul style="list-style-type: none"> <li>• Successful outcomes in the organization's IEJ strategy are fully supported and formally rewarded.</li> <li>• IEJ Strategy is mapped out in a comprehensive strategic plan and supported by a responsibility structure.</li> <li>• IEJ vision and strategy is part of all employee journeys across the organization including onboarding, training, development, recognition, and separation.</li> </ul>
STAGE 5	<p><u>Indicators</u></p> <ul style="list-style-type: none"> <li>• IEJ is embedded in organizational culture and is not seen as an isolated program but rather as a core value, a source of innovation, and a means to growth and success.</li> </ul>

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- IEJ strategy contributes to specific accomplishments and the organization's overall success in observable, measurable ways.
  - The organization is known as a leader in IEJ and is frequently acknowledged, cited, and benchmarked for its pioneering D&I accomplishments.

Strategies

- Major components of IEJ work, including vision, strategy, business case or rationale, goals, policies, principles, and competencies, are regularly revisited.
  - IEJ vision and strategy is part of the decision-making process for all decisions of consequence across the organization.
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# Structure and Implementation Level-Ups

Once your organization has assessed the degree to which IEJ is built into day-to-day business structures (practices and policies), resourced, and supported by the organization's overall operations, you can look to level up. Use the indicators and strategies at the stages above your current stage to guide your efforts moving forward.

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## STAGE 1 Indicators

- There is no organizational structure or budget for IEJ.
- No one in the organization has formal responsibility for addressing IEJ issues.

## STAGE 2 Indicators

- IEJ is simply an additional duty of the human resources department.
- Diversity networks or committees may exist, but they have no real power, influence, or resources.

## STAGE 3 Indicators

- A responsibility structure for ongoing IEJ efforts exists.
- Some budget (time and/or money) has been allocated to cover D&I implementation.

### Strategies

- EJ efforts are given visible support by leaders, represents internal stakeholders, and impacts IEJ efforts.
- If the organization has labor unions or similar groups, they are engaged in D&I efforts.
- IEJ responsibility structures are utilized for advice, counsel, and content expertise by stakeholders across the entire organization.
- Individuals working on IEJ efforts are chosen for their competence and their ability to bring diverse perspectives to the work and not just because they represent an identity group traditionally labeled as underrepresented.

## STAGE 4 Indicators

- IEJ responsibility structures are composed in ways that represent the diversity of the organization both in demography, occupational role, and position in the organizational hierarchy.
- IEJ responsibility structures and resources are recognized as credible and valuable to the everyday function of the organization.

### Strategies

- The organization provides adequate resources and support to help ensure implementation of its IEJ strategy.
- The IEJ function is headed by an influential leader who is knowledgeable about IEJ.
- Departments or divisions have a stake in the responsibility structure and understand IEJ goals to be in alignment with the organization's overall strategy.

## STAGE 5 Indicators

- Leaders at all levels contribute to the organization's IEJ initiatives and are regarded as IEJ champions.
  - The IEJ responsibility structure serves advises on recruitment, communications, risk management, product and service development, community engagement, and other organizational issues.
  - IEJ is well integrated into core organizational systems and practices.
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# Leadership and Accountability Level-Ups

Once your organization has assessed the degree to which IEJ is supported and championed by organizational leaders and to which leadership is held accountable to producing positive IEJ outcomes, you can look to level up. Use the indicators and strategies at the stages above your current stage to guide your efforts moving forward.

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## STAGE 1 Indicators

- There is little or no leadership involvement or accountability for IEJ.
- Leaders largely perceive differences between team members and employees and issues related to diversity as problems rather than opportunities.

## STAGE 2 Indicators

- Leaders consistently avoid or are reluctant to address challenging IEJ questions and situations.
- Leaders are generally unfamiliar with IEJ and require explicit instructions or scripts when addressing the topic.
- Leaders' interest in a concern for IEJ is focused mainly on compliance and reputation management.

## STAGE 3 Indicators

- Leaders are knowledgeable about IEJ and understand that encouraging, managing, and assessing IEJ as one of their responsibilities.
- Leaders willingly communicate internally and externally about the organization's IEJ efforts.

### Strategies

- Leaders engage in IEJ issues that are important to employees and are actively involved in diversity networks and responsibility structures.
- To increase their knowledge and competence in IEJ matters, leaders seek continuing education, coaching and/or mentoring and provide these opportunities to others.

## STAGE 4 Indicators

- Leaders are involved in IEJ initiatives and take the lead on aligning overall goals and the IEJ strategy.
- Leaders hold themselves and others responsible for achieving the D&I goals and objectives.

### Strategies

- Leadership provides recognition for IEJ champions and advocates that achieve stated IEJ outcomes.
- Leadership teams are built with an eye for diversity and effective leverage that diversity to achieve the organization's goals.

## STAGE 5 Indicators

- Leadership understands that IEJ is systemic and can clearly articulate how IEJ efforts and outcomes show up across all organizational functions.
  - Leadership publicly supports internal and external IEJ-related initiatives that align with its strategy and stated values, even if they are perceived to be controversial.
  - Management performance, pay, bonuses, and promotions are tied to a variety of IEJ indicators.
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- The overwhelming majority of employees across an array of dimensions of differences indicate (via assessment) that leadership treats them inclusively and equitably.
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# Pipeline Development and Recruitment Strategy Level-Ups

Once your organization has assessed the degree to which pipeline development and recruitment strategies reflection inclusive, equitable, and just design and enable the organization to recruit a qualified workforce that reflects the diversity of the surrounding community, you can look to level up. Use the indicators and strategies at the stages above your current stage to guide your efforts moving forward.

## STAGE 1 Indicators

- There is no effort to recruit, select, or retain employees from diverse underrepresented groups at any level.
- Other than a short statement that the organization has an equal opportunity or similar policy, there is no mention of IEJ or diversity in the organization's public messaging.

## STAGE 2 Indicators

- There are no formal efforts to increase the size or shift the composition of the recruitment pipeline.
- The hiring focus is based primarily on representation to meet numerical demographic diversity targets.

### Strategies

- Recruitment announcements are not distributed strategically to increase impressions among underrepresented groups and are predominantly shared via the organization's own communication channels and/or established industry channels.
- Recruitment systems do not consider how people from different cultures and backgrounds may respond to interview questions.
- The desire to increase diversity workforce has been expressed but is not supported by organizational systems or dedicated resources.

## STAGE 3 Indicators

- The organization is making ad hoc efforts to make itself known as a potential employer among underrepresented populations.
- The workforce is beginning to reflect the diversity found in the organization's qualified labor market, but there is still underutilization of certain groups in mid-level and senior-level positions and some functions.

### Strategies

- Recruitment includes advertising on IEJ/diversity-focused career websites, using local workforce development agencies, nonprofit or philanthropic partners, and networking through existing employee and consumer diversity.
- Managers are educated in understanding differences and the impact their biases may have on selection, onboarding, and job function decisions.
- The organization attempts to remove biases based on personality type; for example, showing or restraining emotions won't be seen as a barrier.
- The organization's commitment to IEJ is a central part of public messaging throughout the recruitment process.

## STAGE 4 Indicators

- The organization has formalized a process for developing and allocated resources to processing a larger and more diverse pipeline.

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- The workforce increasingly reflects the diversity found in the organization’s qualified labor market, and underrepresented groups are beginning to be represented in mid-level and senior-level positions.

#### Strategies

- Recruitment and selection panels understand how bias enters recruiting and therefore include members knowledgeable about the diverse population the organization wants to attract and advance.
- Hiring committees and professionals are exposed to a variety of cultures, markets, values, and practices as part of their training and development.
- Employees are encouraged to consider development opportunities and positions outside their current functional, technical, or professional area.

#### STAGE 5 Indicators

- The workforce across all levels and functions is generally representative of the organization’s labor markets.
- The organization’s reputation for IEJ efforts enhances its ability to attract and retain employees who contribute to positive organizational results.
- The organization’s pipeline development and recruitment processes have resulted in equitable and accessible recruitment, positive community relationships, and a pervasive feeling of inclusion.

# Retention, Development, and Advancement Level-Ups

Once your organization has assessed the degree to which retention, development, and advancement strategies produce equitable outcomes and allow the organization to leverage its existing diversity for positive outcomes, you can look to level up. Use the indicators and strategies at the stages above your current stage to guide your efforts moving forward.

## STAGE 1 Indicators

- There is no effort to retain or advance employees from diverse underrepresented groups at any level.
- Cultural “fit” is an expression of social and demographic similarity.

## STAGE 2 Indicators

- Retention, development, and advancement process are focused primarily on representation to meet numerical demographic diversity targets.

### Strategies

- Development and advancement systems do not focus on being inclusive to existing diversity in the workforce.
- Development and retention strategies do not consider a broad range of needs, strengths, and life situations.
- The desire to retain and develop diverse talent has been expressed but is not supported by organizational systems or dedicated resources.

## STAGE 3 Indicators

- The workforce is beginning to reflect the diversity found in the organization’s qualified labor market, but there is still underutilization of certain groups in mid-level and senior-level positions and some functions.
- Criteria for advancement are transparent and well understood by all members of the workforce.

### Strategies

- Managers are educated in understanding differences and the impact their biases may have on job function and promotion decisions.
- The organization attempts to remove biases based on personality type or social compatibility and focuses on objective criteria that have been vetted for accessibility, inclusion, and equity.
- The organization’s commitment to IEJ is a central part of internal messaging throughout the employee journey, not just during onboarding and training.
- Employee engagement surveys or other assessment mechanisms are regularly used to gauge employee experience.

## STAGE 4 Indicators

- The organization has formalized a process for identifying and developing employee potential in a range of different ways that allow individuals from diverse backgrounds to experience success.
- The workforce increasingly reflects the diversity found in the organization’s qualified labor market, and underrepresented groups are beginning to be represented in mid-level and senior-level positions.

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Strategies

- Those who design professional development opportunities and those who make promotion decisions are exposed to a variety of cultures, markets, values, and practices as part of their training and development.
- Employees are encouraged to consider development and advancement opportunities and positions outside their current functional, technical, or professional area.
- Employee engagement surveys or other assessment mechanisms are regularly used to gauge employee experience and include a mechanism to conduct disparity analysis to gauge whether groups experience the workplace differently than others.

STAGE 5 Indicators

- The workforce across all levels and functions is generally representative of the organization's labor markets.
- The organization's reputation for IEJ efforts enhances its ability to retain employees who contribute to positive organizational results.
- Employee engagement surveys or other assessment mechanisms reflect a high degree of satisfaction among employees with no significant disparities between different groups.
- The organization's professional development and promotion policies are equitable and accessible and foster positive community relationships and a pervasive feeling of inclusion.

# Assessment and Research Level-Ups

Once your organization has assessed the degree to which the organization utilizes assessment and research to support the achievement of positive IEJ outcomes, you can look to level up. Use the indicators and strategies at the stages above your current stage to guide your efforts moving forward.

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## STAGE 1 Indicators

- There is no attempt or effort to evaluate or monitor diversity-related issues or IEJ progress.
- There are no assessments to gather information about diverse employee or customer needs and concerns, or about organizational culture or employee engagement.

## STAGE 2 Indicators

- IEJ research is primarily based on past negative indicators, such as turnover, lawsuits, and complaints.
- Representation of members of groups of some diversity dimensions are monitored when required by law.
- Limited feedback on IEJ is solicited but there is no follow-up, no rewards, and no consequences for poor performance.

### Strategies

- Some feedback on IEJ is solicited in employee and customer surveys, market research, internal reviews, or climate studies.

## STAGE 3 Indicators

- Leaders are individually measured on the execution and accomplishment of D&I goals specific to their areas of responsibility.
- Information from tools like focus groups, interviews, and opinion/engagement surveys from employees, former employees, and customers helps to shape future IEJ initiatives.

### Strategies

- Internal and external best practices and benchmarks are studied and used to improve the organizations IEJ efforts.
- Assessment tools and quantitative monitoring techniques are used to measure progress on recruitment, retention, compensation, and other IEJ elements.

## STAGE 4 Indicators

- The organization can clearly demonstrate organizational improvements from meeting IEJ goals and outcomes.
- The organization invests in research to study IEJ for both internal and external purposes.
- Integrated, multiple approaches to monitoring and evaluating IEJ goals are conducted to track their impact and effectiveness and make improvements when necessary.

### Strategies

- All employees are measured on their performance based on IEJ goals set by the organization.
- Organizational culture is monitored through cultural audits and employee opinion surveys using varied diversity dimensions.

## STAGE 5 Indicators

- In-depth IEJ assessments covering behavior, attitude, and perception are regularly conducted for the overall organization and within organizational units and feed into strategy and implementation.
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- The organization is known for its investment in IEJ research and in sharing the findings publicly.
  - The organization has demonstrated significant annual improvements in meeting IEJ goals consistently over several years.
  - IEJ measurements are included as part of the organization's overall performance, linked to the organizational strategy, and tied to compensation, and publicly shared.
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# Learning and Skill Development Level-Ups

Once your organization has assessed the degree to which the organization engages in ongoing learning and skill development in IEJ topics and to which IEJ is integrated into all applicable learning and skill development opportunities, you can look to level up. Use the indicators and strategies at the stages above your current stage to guide your efforts moving forward.

## STAGE 1 Indicators

- There are no formal IEJ learning or education activities.
- There is little IEJ awareness, knowledge, or understanding.

## STAGE 2 Indicators

- Persons designing and delivering learning do not have specific expertise in IEJ.
- IEJ learning is brief and focused only on educating employees about policies, meeting legal requirements, or assisting with language use.
- IEJ programs are primarily “off-the-shelf” and not tailored for organizational needs and issues.

### Strategies

- IEJ training is offered, as a means of preventing incidents of illegal discrimination or harassment

## STAGE 3 Indicators

- The organization encourages cultural celebrations and organization-wide activities that combine social interaction with IEJ learning.
- IEJ experts or learning professionals build IEJ into every stage of the learning design and/or conduct the D&I learning programs.
- Programs address sometimes-sensitive issues of privilege, stereotypes, bias, and “isms” and include development of skills to address those issues.
- IEJ learning opportunities are developed in multiple languages if needed and offered in a variety of accessible formats.

### Strategies

- In addition to general IEJ education, employees also receive training to implement the IEJ strategy. It includes content specific to their level and areas of responsibility.
- IEJ is integrated into the organization’s overall learning and education programs, including employee orientation, customer service, and management programs.

## STAGE 4 Indicators

- A variety of innovative learning methods are used, including classroom, self-study, experiential, eLearning, assessment, social learning, social media, videos, games, and case studies to meet IEJ learning needs.
- Programs focused on specific dimensions of diversity, such as disability, gender and gender identity, sexual orientation, social class, generations, culture, religion, race, and ethnicity are offered based on identified needs.

### Strategies

- IEJ professionals, experts in learning methods and cross-cultural education, and organizational leaders are involved in the development, delivery, and reinforcement of D&I learning and education.
- IEJ learning and education is an on-going, multi-year, developmental curriculum that takes individuals through graduated stages of learning.

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STAGE 5    Indicators

- IEJ is integrated into all learning and advances the organization’s strategy.
  - A variety of innovative IEJ tools, including both extensive self-directed and instructor-led learning resources, are accessible to all regardless of location.
  - Learning from IEJ best practices leads the way in creating new organizational culture, structures, services, and products that impact performance and sustainability.
  - Challenging and sometimes controversial issues are effectively addressed with sensitivity, fairness, conviction, and compassion.
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# Internal Communications Level-Ups

Once your organization has assessed the degree to which the organization embeds its commitment to IEJ in internal communications, you can look to level up. Use the indicators and strategies at the stages above your current stage to guide your efforts moving forward.

STAGE 1	<p><u>Indicators</u></p> <ul style="list-style-type: none"> <li>• There is no explicit communication about IEJ in meeting, newsletters, training, onboarding, or other internal communications.</li> <li>• Leaders perceive discussions on IEJ topics to be risky and are they are subsequently avoided.</li> <li>• Organizational communication is not analyzed or adjusted for appropriateness regarding IEJ.</li> </ul>
STAGE 2	<p><u>Indicators</u></p> <ul style="list-style-type: none"> <li>• The majority of IEJ communication is disseminated by IEJ councils/committees or diversity networks (like employee resource or affinity groups) rather than through regular organizational channels and thereby seen as not officially endorsed by the organization.</li> <li>• IEJ communication is done solely to remind or educate employees about adhering to policy and compliance requirements.</li> </ul>
STAGE 3	<p><u>Indicators</u></p> <ul style="list-style-type: none"> <li>• All internal communication reflects awareness and knowledge of diversity, including recognition of cultural influences, to enhance inclusion.</li> <li>• Leaders willingly communicate internally and externally about the organization’s IEJ efforts.</li> </ul> <p><u>Strategies</u></p> <ul style="list-style-type: none"> <li>• Translations and other accessible formats of internal communications are provided when needed.</li> <li>• The organization integrates IEJ into communication about many aspects of the business by aligning IEJ with overall organizational goals and issues.</li> <li>• The organization encourages employees to discuss IEJ topics and provides safe spaces and procedures for doing so.</li> </ul>
STAGE 4	<p><u>Indicators</u></p> <ul style="list-style-type: none"> <li>• Leaders regularly share information about IEJ efforts with stakeholders, including successes and failures.</li> <li>• Those responsible for creating internal communications (staff, marketing, and PR firms, etc.) are educated about IEJ and include IEJ messaging in general organizational communications.</li> </ul> <p><u>Strategies</u></p> <ul style="list-style-type: none"> <li>• All internal communications are fully accessible and available in multiple formats and languages if needed by stakeholders.</li> <li>• Employees have evergreen access to information on IEJ on the organization’s website, intranet, employee handbook, SOP manuals, or other internal communications vehicles. Information is also sent frequently and systematically to employees.</li> </ul>
STAGE 5	<p><u>Indicators</u></p> <ul style="list-style-type: none"> <li>• Internal communication about IEJ is frequent, ongoing, innovative, and contributes to an enhanced reputation for the organization among team members and stakeholders.</li> <li>• Internal communication about IEJ is seamlessly integrated into internal communications, such that it not perceived as “diversity-specific” but rather part of day-to-day operations.</li> <li>• Information about IEJ topics is easily and quickly located via the organization’s internal communication platforms. Information is thorough, fully accessible, and regularly updated.</li> </ul>

# Marketing and External Communications Level-Ups

Once your organization has assessed the degree to which the organization embeds its commitment to IEJ in marketing and external communications, you can look to level up. Use the indicators and strategies at the stages above your current stage to guide your efforts moving forward.

## STAGE 1 Indicators

- Advertising and marketing may perpetuate stereotypes, and nothing is done to counter them.
- Organizational communication is not analyzed or adjusted for appropriateness regarding IEJ concerns.

## STAGE 2 Indicators

- The majority of IEJ communication is disseminated by councils/committees or diversity networks rather than through regular organizational channels and thereby seen as not officially endorsed by the organization.
- IEJ marketing and external communication is done solely around non-controversial issues and long accepted cultural observances.
- Marketing and external communications are not adapted to be culturally sensitive.

### Strategies

- The organization only recognizes broad differences among its customers, such as young and old, without exploring generational differences.
- Products and services may be marketed somewhat differently to different groups.

## STAGE 3 Indicators

- Marketing, advertising, and public relations groups in the organization reflect diversity and are positioned to reach diverse markets.
- Some attempt is made to reach a diverse range of customers by using market-specific media.

### Strategies

- Test groups are diverse and encouraged to evaluate marketing and service strategies and techniques for various groups and cultures.

## STAGE 4 Indicators

- Agencies and consultants with expertise in diversity and inclusion provide advice when needed.
- The marketing and sales force has intercultural competence and can adapt and work effectively with customers of many backgrounds.
- While outside IEJ expertise may also be sought, the organization leverages the marketing, distribution, and customer service expertise of its diverse staff.

### Strategies

- All marketing and external communication processes are fully accessible, and accessibility is built into the process of design and development of marketing materials.
- Marketing, advertising, public relations, and all customer contact methods do not perpetuate stereotypes, but rather promote positive role models and challenge assumptions.

- Diverse groups of customers and potential customers are surveyed on needs and satisfaction. The results shape marketing, sales, distribution, and customer service strategies.

STAGE 5 Indicators

- If the organization uses a systemic marketing and customer service approach it ensures that it can be customized or adapted within and across cultures, languages, and other diversity dimensions.
  - The organization is keenly aware of the needs, motivations, and perspectives of diverse customer and stakeholder groups and successfully adapts marketing, sales, and distribution strategies to meet these needs.
  - The organization uses sophisticated analysis techniques on an ongoing basis to understand and respond to its diverse customer base.
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# Community Relations and Social Responsibility Level-Ups

Once your organization has assessed the degree to which the organization engages diverse stakeholders in its commitment to social responsibility and community engagement activities, you can look to level up. Use the indicators and strategies at the stages above your current stage to guide your efforts moving forward.

STAGE 1	<p><u>Indicators</u></p> <ul style="list-style-type: none"> <li>• There is no involvement or support provided to community or government initiatives related to IEJ.</li> <li>• The organization is not willing to take a stand or adopt a firm position about IEJ.</li> </ul>
STAGE 2	<p><u>Indicators</u></p> <ul style="list-style-type: none"> <li>• There is some minor involvement in or support for societal D&amp;I issues but only if considered non-controversial and primarily for public relations purposes.</li> </ul> <p><u>Strategies</u></p> <ul style="list-style-type: none"> <li>• There is some minor involvement with the community, schools, and/or local government projects.</li> </ul>
STAGE 3	<p><u>Indicators</u></p> <ul style="list-style-type: none"> <li>• Long-range community development plans are formulated with diverse groups, including local governments and community leaders.</li> <li>• The organization partners with other organizations that work to advance the rights of vulnerable groups in the community.</li> </ul> <p><u>Strategies</u></p> <ul style="list-style-type: none"> <li>• The organization publicizes its social responsibility policy.</li> <li>• Community heroes from underrepresented groups and/or champions for IEJ issues are celebrated by the organization.</li> </ul>
STAGE 4	<p><u>Indicators</u></p> <ul style="list-style-type: none"> <li>• The organization support programs from underrepresented populations that have a positive impact on both the community and the organization's future labor force.</li> <li>• Community involvement reflects long-range planning and supports most segments of the population.</li> </ul> <p><u>Strategies</u></p> <ul style="list-style-type: none"> <li>• The organization connects IEJ goals with ethics and integrity initiatives, and supports social justice, social cohesion, and economic development.</li> </ul>
STAGE 5	<p><u>Indicators</u></p> <ul style="list-style-type: none"> <li>• The organization's IEJ initiatives in the community are treated as more than philanthropy. They are perceived as a core function mainstreamed into organizational strategy.</li> <li>• The organization is generous in supporting and assisting other organizations in their IEJ initiatives and in promoting the advancement of D&amp;I and social responsibility in the community</li> </ul>

# Products, Services, Events and Spaces Level-Ups

Once your organization has assessed the degree to which the organization embeds its commitment to IEJ in internal communications products, services, events, and spaces, you can look to level up. Use the indicators and strategies at the stages above your current stage to guide your efforts moving forward.

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## STAGE 1 Indicators

- No effort is made to adapt products, services, events or spaces for diverse customers or stakeholders.
- Development teams and focus groups do not include a diverse population of employees, potential customers, or other stakeholders.

## STAGE 2 Indicators

- There is no adaptation of products, services, or policies for accessibility for persons with disabilities, unless required by law.

### Strategies

- There is limited interest in developing or altering products, services, events, or spaces to be more inclusive of customer preferences or demographics.

## STAGE 3 Indicators

- Accessibility for persons with disabilities is often considered in the development and delivery of products, services, and policies.
- Diverse and culturally competent teams are encouraged to develop innovative ideas that enhance products, services, events, and spaces.

### Strategies

- Research helps analyze how different customer/stakeholder groups and cultures may use the organization's products, services, events, and spaces.
- Products, services, and policies are analyzed for their value to current and potential customers and are tailored appropriately.

## STAGE 4 Indicators

- Changes in demographics, values, and consumer behaviors are researched, anticipated, and served.

### Strategies

- The organization successfully leverages diverse teams, believing it will improve the quality and innovation of products, services, events, and spaces.

## STAGE 5 Indicators

- The organization shows the link between diversity and innovation, consistently leveraging IEJ to increase product and service innovation.
  - The product, service, events, and space development and design processes recognize diversity and accessibility from the outset. It doesn't merely adapt products first developed for the dominant group or culture.
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# Supplier & Partner Diversity Level-Ups

Once your organization has assessed the degree to which the organization leverages its procurement activity and other partnerships to further IEJ outcomes, you can look to level up. Use the indicators and strategies at the stages above your current stage to guide your efforts moving forward.

## STAGE 1 Indicators

- No consideration is given to diversity or social equity when determining suppliers and no supplier diversity program exists.
- There is no recognition of the value that diverse suppliers bring to the organization or industry.

## STAGE 2 Indicators

- There is no or very little collaboration between the procurement function, where relationships with suppliers are usually managed, and the IEJ function.
- There is some attempt to include a few non-traditional suppliers from diverse groups, but only because it is required and without a strategy to support organizational goals.

### Strategies

- The organization uses underrepresented suppliers for small, one-time, or low-fee contracts.

## STAGE 3 Indicators

- The organization has a supplier diversity strategy with dedicated resources for implementation.
- Input from underrepresented suppliers is included in the organization's supplier diversity program.

### Strategies

- The organization maintains or has gained access to a supplier database that includes information about the ownership of organizations that supply goods or services and the diversity of its employees.
- IEJ education specific to supplier relations is provided to all staff who interact with suppliers.
- The organization regularly participates in trade fairs and advertising and seeks opportunities to inform underrepresented suppliers that the organization welcomes their business.

## STAGE 4 Indicators

- The organization publishes information about annual expenditures with diverse suppliers.
- Persons involved in the supplier selection process are knowledgeable about D&I and aware of the potential impact of unconscious bias.
- The organization treats its suppliers with respect and dignity, including simplifying the process of working together and making timely payments.

### Strategies

- Educational assistance and coaching are provided to underrepresented suppliers and potential suppliers to help them be more competitive.
- IEJ criteria is included in the procurement process and given reference or weight in the decision-making process.
- The organization is proactive in seeking and attracting underrepresented suppliers and in informing new and established suppliers of additional opportunities with the organization.

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STAGE 5    Indicators

- The organization procures both essential and non-essential goods and services from underrepresented suppliers.
  - The supplier diversity function is fully aligned with the broad goals of IEJ for the organization.
  - The organization collaborates with its underrepresented suppliers to improve all aspects of supply management.
  - The organization's suppliers reflect the community's composition across a broad array of diversity dimensions.
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