GBRTT
Industry EDI Capability Workshops

CATEGORY 1: VISION, STRATEGY, AND BUSINESS IMPACT

Action: Develop a strong rationale for DEI vision and strategy and align it to organizational goals.

DEI is embedded in the values, mission, culture, and processes of the organization and plays an integral part in achieving organizational growth and success. There is a clear DEI vision and mission, and an explicit understanding of the business impact, which allows for the development of measurements to track progress towards meeting DEI goals. The organization's strategy includes numerical goals for equitable representation. It also includes goals that create inclusion and belonging. The organization is a known leader in DEI and is frequently benchmarked by other organizations

CATEGORY 1: VISION, STRATEGY, AND BUSINESS IMPACT

LEVEL 5: BEST PRACTICE

1.1 DEI strategy is an integral part of the overall organizational strategy and is reflected in vision, values, policies, and practices.
1.2 DEI is embedded in organizational culture as a core value, a source of innovation, and a means to belonging, sustainability and success.
1.3 The organization is frequently acknowledged, cited, and benchmarked by others for its DEI accomplishments.
1.4 The organization is proactive and responsive to DEI challenges that are faced by society, including but not limited to political and economic trends, and recognizes that organizations are microcosms of the societies in which they operate.
1.5 The organization continues to strive for excellence and is known for its pioneering DEI initiatives that help change the patterns which perpetuate systemic oppression.

1.6 The organization's strategy includes numerical goals resulting in equitable representation of underrepresented groups across functions and levels

LEVEL 4: PROGRESSIVE

1.7 The organization's DEI vision and goals to embed equity, prevent harassment, and reduce or eliminate discrimination and oppression are part of the organizational strategy.

1.8 The majority of stakeholders acknowledge that DEI is important to the success of the organization.

1.9 DEI competencies that help achieve the DEI strategy are demonstrated by most leaders and a majority of employees.

1.10 The organization has examined its organizational culture and created strategies to eliminate inequities and reduce barriers to inclusion.

1.11 DEI qualitative and quantitative goals are developed with the help of new technologies and algorithms that include input from a variety of stakeholders.
1.12 The organization invests in ethical artificial intelligence to ensure that barriers to inclusion and equity are minimized.

LEVEL 3: PROACTIVE

1.13 A DEI vision, mission, strategy, and business impact statement has been developed and communicated to all employees.

1.14 DEI is defined broadly to include visible, non-visible, inherent, and acquired dimensions.

1.15 DEI qualitative and quantitative goals that include input from a variety of internal and external stakeholders are being developed.

1.16 Compliance with legislation that protects human rights and ensures safe workplaces is included in the strategy.

LEVEL 2: REACTIVE

1.17 A basic DEI vision, mission, and strategy have been developed and communicated to all employees.

1.18 DEI is defined broadly to include some dimensions beyond gender, race, and ethnicity.
1.19 Compliance with basic legislation is in place

LEVEL 1: INACTIVE

1.20 There is no DEI vision, mission, strategy, goals, policies, principles, or program.

CATEGORY 2: LEADERSHIP AND ACCOUNTABILITY

Action: Hold leaders accountable for implementing the organization's DEI vision, setting goals, achieving results, and being role models

Leaders and board members view the accomplishment of DEI goals and objectives as an important part of their management and oversight responsibilities. They publicly support internal and external diversity- related activities and are seen as DEI change agents. Leaders are held accountable for implementing the DEI strategy. They position DEI as a key component of their organization's sustainability agenda and provide DEI coaching to those they manage, creating both a psychologically and physically safe workplace. Leadership development includes DEI competency building and this is evaluated when determining succession pools for leadership.

CATEGORY 2: LEADERSHIP AND ACCOUNTABILITY

LEVEL 5: BEST PRACTICE

2.1 Leaders are change agents and role models for DEI. They inspire others to take individual responsibility and become role models themselves.
2.2 A large majority of employees across a wide array of diversity dimensions rate their leaders as trustworthy, citing equitable and inclusive treatment.
2.3 Leaders and board members publicly support DEI-related initiatives, even if they are perceived to be controversial or come with personal risk.
2.4 Leaders ensure that DEI is systemic, sustainable, and involves cross-functional collaboration.
2.5 Leaders take accountability for DEI, help create both a psychologically and physically safe workplace, and accept consequences for their actions

LEVEL 4: PROGRESSIVE

2.6 Leaders promote DEI initiatives, communicate the strategy, and provide recognition for DEI champions and advocates.
2.7 The leadership and board of directors are diverse, engaged in DEI issues, and accountable for achieving the DEI strategy.
2.8 Leaders are competent in applying conflict resolution skills to resolve DEI-related grievances and challenges.
2.9 Leaders are rewarded for demonstrating high competency in DEI
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LEVEL 3: PROACTIVE

2.10 DEI is an essential leadership competency and leaders are rated on it.

2.11 Leaders engage in DEI issues important to employees and prevalent in the societies in which they operate.

2.12 To increase their knowledge and competence, leaders seek coaching in DEI and provide coaching, sponsoring, and mentoring to others.

LEVEL 2: REACTIVE

2.13 Leaders are generally unfamiliar or uncomfortable with DEI.

2.14 Although leaders accept some responsibility for DEI, the focus is mainly on complying with regulations.

2.15 Leaders defer regularly to HR or Legal when concerns regarding DEI are observed or reported.

LEVEL 1: INACTIVE

2.16 There is no leadership involvement or accountability for DEI.

2.17 Leaders do not see differences as opportunities for enrichment, progress, and success.

CATEGORY 3: DEI STRUCTURE AND IMPLEMENTATION

Action: Provide visible, dedicated support and structure with authority and budget to effectively implement DEI.

As a reflection of the importance of DEI, there is a dedicated person with DEI expertise on the executive management team and at the Board level. These leaders interact with and have full access to other leaders and the rest of the board, and, if the organization's size merits it, has a professional staff dedicated to DEI. In addition, there are teams, committees or networks within the organization that champion DEI initiatives. DEI professional staff have an adequate budget and resources to implement the strategy.

CATEGORY 3: DEI STRUCTURE AND IMPLEMENTATION

LEVEL 5: BEST PRACTICE

3.1 The most senior person responsible for DEI is an equal and influential partner on the senior leadership team.
3.2 DEI is integrated into core organizational structures, policies, systems, and practices.
3.3 Diversity is reflected equitably in all levels and functions.
3.4 Inclusive/universal design of buildings, products, services, and emerging technologies helps ensure accessibility for all.
3.5 The organization's governance structure is supported by inclusive practices to mitigate concentrations of power and dominance.
3.6 The organization ensures that structures for elected positions (for example in unions and diversity networks, and community/political positions) are fair and equitable

LEVEL 4: PROGRESSIVE

3.7 The board of directors has a committee dedicated to DEI.
3.8 The organization provides resources, staffing, and support to help ensure implementation of its DEI strategy.
3.9 The DEI function is headed by an influential leader who is knowledgeable about and committed to DEI.
3.10 An organization-wide DEI council/ committee, which includes line and staff employees, is given visible and meaningful support by leaders.
3.11 Diversity networks are recognized as credible, influential, and valued resources to the organization. They sometimes coordinate in recognition of their intersectionality.
3.12 All departments/business units collaborate to ensure a holistic and integrated approach to DEI.

LEVEL 3: PROACTIVE

3.13 The organization has a DEI champion/ leader with responsibility for DEI.

3.14 Departments have their own DEI councils/committees.

3.15 A budget has been allocated to cover DEI implementation, including support for diversity networks.

3.16 If the organization has labour unions or similar groups, they are engaged and included in DEI efforts.

3.17 Members of the DEI department or function are called upon for advice, counsel, and expertise.

LEVEL 2: REACTIVE

3.18 DEI is simply an additional duty of the human resources, legal, or other department.
3.19 Diversity networks and DEI committees may exist, but they have no real power, influence, or resources

LEVEL 1: INACTIVE

3.20 There is no organizational structure, policy, or budget for DEI.

3.21 No one in the organization has formal responsibility for DEI.

CATEGORY 4: RECRUITMENT

Action: Ensure that attraction, sourcing, and recruitment is done through the lens of DEI

A conscious effort is made to attract applicants from diverse groups to achieve and maintain a workforce that is equitably representative across levels and functions. Advertising and recruitment are targeted to diverse communities. Diversity on interviewing panels is standard, and staffing/ hiring managers are educated on the impact of conscious and unconscious bias. The recruitment process is regularly reviewed to ensure it is equitable and fair. Hiring of underrepresented groups is roughly proportionate to their representation. There are clear DEI measures of success throughout the recruitment process.

CATEGORY 4: RECRUITMENT

LEVEL 5: BEST PRACTICE

4.1 The organization's attraction and hiring processes result in measurable, transparent, and equitable recruitment.
4.2 The organization's reputation for quality DEI efforts enhances its ability to attract diverse and underrepresented employees.
4.3 When technological solutions are used for recruitment, the organization implements practices to minimize or remove algorithmic bias.
4.4 The organization conducts regular evaluations of recruiting practices to ensure that candidates from different groups and identities are given equitable opportunities.
4.5 There are clear measures of success throughout the recruitment process, such as the percentage of diverse and underrepresented applicants at each stage

LEVEL 4: PROGRESSIVE

4.6 The organization effectively recruits from representative labour markets.

4.7 Recruitment includes advertising on DEI-focused websites and in a variety of other media.

4.8 Recruitment and selection panels are diverse and knowledgeable about recruiting processes and in mitigating biases

LEVEL 3: PROACTIVE

4.9 Interviewers conduct culturally competent interviews.

4.10 Staff are hired for their competence and their ability to bring diverse perspectives to the work and not only because they are from an underrepresented identity group.

4.11 The organization's advertisements and/or diversity networks reach broad pools of diverse talent.

4.12 External search firms are selected based in part on their expertise in diversity recruiting.

LEVEL 2: REACTIVE

4.13 Recruitment is based primarily on representation to meet numerical goals or targets.

4.14 Recruitment practices do not include sourcing diverse candidates from underrepresented groups.

4.15 Interviewers do not consider how people from different cultures and backgrounds may respond to interview questions and methods

LEVEL 1: INACTIVE

4.16 There is no effort to recruit employees from underrepresented groups.

4.17 Other than a short statement that the organization has an equal opportunity or similar policy, there is no mention of DEI in the organization's recruitment practices

CATEGORY 5: ADVANCEMENT AND RETENTION

Action: Ensure that DEI is integrated into talent development, performance management, advancement, and retention

A conscious effort is made to maintain a workforce that is diverse across levels and functions. High-potential employees from underrepresented groups are provided with coaching, mentoring, and sponsorship opportunities to advance within the organization. The onboarding process results in all new employees feeling valued and included. Promotion and advancement of underrepresented groups is proportional to the representation of those groups in the organization. Performance reviews, and involuntary and voluntary turnover of underrepresented groups are measured and analyzed using interviews, employee engagement surveys, and so forth.

CATEGORY 5: ADVANCEMENT AND RETENTION

LEVEL 5: BEST PRACTICE

5.1 The organization's talent management, advancement, and retention processes result in equitable treatment of employees.
5.2 Diverse employees hold positions at all levels and functions to ensure equitable representation.
5.3 The organization's reputation for quality DEI initiatives enhances its ability to retain and advance diverse employees.
5.4 The pool of candidates in the organization's succession plan is diverse along multiple dimensions and prioritizes underrepresented groups.
5.5 Turnover is at an acceptable rate. Adverse impact, unfairness, and discrimination are not the primary cause of turnover.
5.6 The onboarding process results in all new employees feeling valued and included.

LEVEL 4: PROGRESSIVE

5.7 The organization's talent management plan emphasizes retention of underrepresented employees at most levels and in most functions.
5.8 All employees are encouraged to consider advancement opportunities and positions outside their current functional, technical, or professional area.
5.9 The organization counteracts bias in advancement and develops practices to overcome inequities.
5.10 The organization has established mentoring and/or coaching processes to help ensure advancement and retention.
5.11 The organization conducts regular stay and exit interviews to understand its culture of inclusion and belonging.

LEVEL 3: PROACTIVE

5.12 An onboarding process is beginning to show effectiveness at integrating underrepresented employees into the organization.

5.13 The workforce is beginning to reflect the diversity found in the organization's labour markets.

5.14 Turnover is actively and regularly tracked with exit interviews to understand DEI issues and remove barriers to retention.

5.15 The organization offers a variety of advancement opportunities responsive to diverse needs.

5.16 The organization addresses conscious and unconscious bias in its entire talent development processes.

LEVEL 2: REACTIVE

5.17 Advancement and promotion processes are based primarily on representation to meet numerical or equity goals or targets

LEVEL 1: INACTIVE

5.18 There is no effort to advance or retain employees from underrepresented groups at any level.
5.19 The entire talent management process is not sensitive to cultural and other differences

CATEGORY 6: JOB DESIGN, CLASSIFICATION, AND COMPENSATION

Action: Ensure that DEI is integrated into talent development, performance management, advancement, and retention

A conscious effort is made to maintain a workforce that is diverse across levels and functions. High-potential employees from underrepresented groups are provided with coaching, mentoring, and sponsorship opportunities to advance within the organization. The onboarding process results in all new employees feeling valued and included. Promotion and advancement of underrepresented groups is proportional to the representation of those groups in the organization. Performance reviews, and involuntary and voluntary turnover of underrepresented groups are measured and analyzed using interviews, employee engagement surveys, and so forth.

CATEGORY 6: JOB DESIGN, CLASSIFICATION, AND COMPENSATION

LEVEL 5: BEST PRACTICE

6.1 The organization maintains equitable job design, classification, and compensation practices.
6.2 Jobs are designed to ensure that roles and responsibilities support work/life integration and decent work for all.
6.3 Regular reviews of pay differentials are conducted and discrepancies between underrepresented groups and dominant groups are eliminated.
6.4 Performance, pay, bonuses, and promotions are tied to a variety of DEI measures.

LEVEL 4: PROGRESSIVE

6.5 Classification and compensation systems are regularly reviewed to address inequities.
6.6 There are measures in place to ensure that the role, authority, decision making, and benefits of a job do not change when a member of an underrepresented group is appointed.
6.7 Employees are paid for performance and outcomes rather than attendance.
6.8 Job requirements and descriptions are clear and not confused with non-job-related factors, especially those based on preferences and biases.
6.9 Job design accommodates employees' need for part time or flexible work, working non-standard hours, working remotely, and taking leave for personal or other reasons.

LEVEL 3: PROACTIVE

6.14 Some written procedures exist for classifying jobs and determining compensation, but these are frequently determined by supervisors' personal preferences.

6.15 Pay equity is measured and audited only if required by law.

6.16 The organization adheres to locally agreed upon minimum wage levels.

6.17 Based on stereotypes involving language, gender, age, race, culture or disability, some jobs are thought to be a "better fit" for members of certain groups.

LEVEL 2: REACTIVE

6.10 The organization pays wages that exceed the legal minimum for the local marketplace.

6.11 Work and job roles are designed to align individual talents and needs with organizational requirements.

6.12 Job classification and compensation systems are understood by most employees.
6.13 The organization has standardized job designs to minimize subjectivity and ensure equity

LEVEL 1: INACTIVE

6.18 The organization lacks methods for classifying jobs, determining compensation, and assessing pay differences of underrepresented groups

CATEGORY 7: WORK-LIFE INTEGRATION, FLEXIBILITY, AND BENEFITS

Action: Achieve work-life integration, flexibility, and equitable benefits. Flexible work options are widely available and accessible

Work-life integration, flexibility, and equitable benefits are encouraged, actively promoted, recognized as enhancements of productivity, and are not career limiting. To this end, the organization's performance management focusses on output, contribution and impact. Benefits and services that are specific to the diverse needs of employees are provided based on ongoing assessments of employee needs. Some examples are: subsidized dependent-care, parental leave, extended family consideration, eldercare, emergency care, fitness pro- grams, and paid leave. Accommodations for religious practices, persons with disabilities, and others are achieved with care and consideration and go beyond legal requirements. Organizations and their leaders prioritize psycho- logical safety, security, and wellness within their employees' work environment.

CATEGORY 7: WORK-LIFE INTEGRATION, FLEXIBILITY, AND BENEFITS

LEVEL 5: BEST PRACTICE

7.1 The organization's policies and practices regarding benefits, work-life integration and flexibility meet the organization's commitment to decent work, psychological safety, and respect for human rights.
7.2 A comprehensive range of flexible benefits and services, including education, counselling, and physical and mental health services are provided equitably to all employees whether permanent or temporary.
7.3 The organization gives benefits to part- time and temporary employees.
7.4 All leaders model and encourage work-life integration.
7.5 Working part-time, job sharing, working remotely, and other flexible work arrangements are available for all appropriate positions and levels.
7.6 Benefits and services are regularly adapted to changing conditions such as pandemics and natural disasters, and technological breakthroughs.
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LEVEL 4: PROGRESSIVE

7.7 Policies and practices guard against favouritism and are communicated and applied equitably across the organization in a culturally sensitive way.

7.8 An inclusive concept of family that is multicultural and non-patriarchal guides family- friendly policies including childcare and eldercare, emergency care.

7.9 Paid leave beyond what is legally required is provided and used. The definition of family is inclusive. This may include caregiving for partners, children, and adult dependents or bereavement for extended families.

7.10 Using flexible work arrangements does not negatively impact employee performance, evaluation, advancement, or benefits.

7.11 Facilities and accommodations for meditation, religious practices, lactation, and other needs are provided.

7.12 Technology support for mobility, disabilities, mental health, and flexible work arrangements are available for employees

LEVEL 3: PROACTIVE

7.13 The organizational culture equitably treats those who work flexible schedules.

7.14 Religious practices, cultural celebrations, and holidays are accommodated, even when they are not the practices of the dominant culture.

7.15 Flexibility in personal appearance and designing one's workspace are accepted if done in a non-offensive manner and under an agreed upon policy.

LEVEL 2: REACTIVE

7.16 Benefit programs generally are "one- size-fits-all" and their value or relevance to employees is not monitored.

7.17 Work schedules are generally traditional, inflexible, or compliance driven.

7.18 Flexibility may be applied inconsistently or perceived as favouritism.

LEVEL 1: INACTIVE

7.19 There is no provision for childcare and family needs, schedule flexibility, or work leave other than what is legally required

CATEGORY 8: ASSESSMENT, MEASUREMENT, AND RESEARCH

Action: Ensure that assessments, measurement, **and research guide DEI decisions**

DEI measures are explicitly linked to strategy and have an impact on leaders at all levels, including their performance appraisals, recognition, and rewards. The organization has a dashboard or scorecard for reputational risk assessment on DEI issues.

The views of stakeholders are an important factor in measuring DEI and sustainability performance for both the organization and individuals. The measurements include stakeholder opinions and experiences, and a mix of quantitative and qualitative measures. Information on all aspects of DEI is gathered and evaluated using practices such as 360-feedback and/or multifaceted, culturally sensitive, and linguistically appropriate feedback, focus groups, opinion and engagement surveys, and organizational audits

CATEGORY 8: ASSESSMENT, MEASUREMENT, AND RESEARCH

LEVEL 5: BEST PRACTICE

8.1 In-depth DEI assessments are regularly conducted on the overall organization and within departments, and the results are incorporated into strategy and implementation
8.2 The organization regularly reports and reviews progress against benchmarks and has consistently demonstrated significant improvements in meeting DEI goals over several years.
8.3 The organization is known for its investment in DEI research and the impact of research on organizational performance.
8.4 A reputational risk assessment including several DEI issues, such as racism, sexism, homophobia, harassment, disability discrimination, and other forms of discrimination, is regularly conducted.
8.5 The organization ensures that the design of its assessment, measurement, and research incorporate DEI perspectives.

LEVEL 4: PROGRESSIVE

8.6 Integrated, multiple approaches to monitoring and evaluating DEI goals are implemented to track their impact, outcomes, and effectiveness.

8.7 The organization invests in research to study DEI for both internal and external purposes.

8.8 DEI measurement is integrated into assessment tools, such as engagement surveys or cultural audits.

8.9 All employees are measured on their performance, which includes DEI goals.

8.10 Information from all assessments from employees, former employees, and customers shape future DEI initiatives.

8.11 Culturally competent artificial intelligence is used to identify and minimize bias in assessment tools.
8.12 All organizational assessments have been reviewed from a DEI perspective and work to counter bias

LEVEL 3: PROACTIVE

8.13 Employees regard DEI measurements as credible and they participate willingly in assessment, measurement, and research.

8.14 Cultural audits, assessments, and surveys take into account such issues as language, education levels, complexity, and accessibility.

8.15 Data are sorted by self-identified characteristics and diversity dimensions to increase an organization's learnings about employee groups.

8.16 The organization regularly conducts a census of employee demographics and monitors representation throughout the organization.

8.17 The principles of self-identification for use in collection of employee information is clear, applied ethically, and agreed-upon by all impacted parties.

LEVEL 2: REACTIVE

8.18 Representation of groups of some diversity dimensions are monitored, but only if required by law.

8.19 Measurements are primarily based on past indicators, such as turnover, lawsuits, and complaints.

LEVEL 1: INACTIVE

8.20 There are no assessments to gather information about underrepresented employee or customer needs and concerns.

8.21 There is no effort to evaluate or monitor diversity-related issues or DEI progress.

CATEGORY 9:DEI COMMUNICATIONS

Action: Make communication clear, simple to understand, and a crucial force in achieving the organization's DEI goals

Communications professionals are educated about DEI and its link with sustainability. All internal and external communication is fully accessible and available in multiple formats and, if applicable, in locally spoken languages. The organization has made and communicated a decision on the use of inclusive language to account for various diversity dimensions. The communication sent out both internally and externally does not prejudice or harm any group intentionally and where this occurs, it is corrected quickly and clearly. DEI topics are easy and quick to find on the organization's websites and social media platforms. DEI communication is frequent, ongoing, innovative, and contributes to an enhanced reputation for the organization. Progress on reaching DEI vision and goals is reported to the public regularly.

CATEGORY 9: DEI COMMUNICATIONS

LEVEL 5: BEST PRACTICE

9.1 The organization is known for its high-quality DEI initiatives that are regularly communicated internally and externally enhancing the organization's reputation.

9.2 DEI content is easily and quickly located on the organization's websites. Information is thorough, regularly updated, and fully accessible.

9.3 The organization has made and communicated a policy on the use of inclusive language on race and ethnicity, gender, gender identity, and gender expression, sexual orientation, disability, and other dimensions.

9.4 The organization uses bold and transparent communication in naming and dealing with challenging issues such as racism, sexism, homophobia, privilege, toxic masculinity, and white supremacy.

9.5 The organization uses live and accurate translation services to ensure accessibility and linguistic inclusion

LEVEL 4: PROGRESSIVE

9.6 The purposes of DEI initiatives are clearly stated, and communication strategies are adapted for different stakeholders.

9.7 Information on DEI is sent frequently and systematically through a variety of channels to employees and other stakeholders.

9.8 Communications professionals and speechwriters are knowledgeable about DEI and they include DEI messages in general communications.

9.9 The organization has an ethical framework to leverage social media in both internal and external communication platforms.

9.10 The organization proactively addresses socially-charged issues and events related to DEI internally and externally, including on social media.

LEVEL 3: PROACTIVE

9.11 The organization integrates DEI into many aspects of communication.

9.12 The organization encourages employees to discuss DEI and provide input to the organization's initiatives.

9.13 The organization enables employees to indicate gender pronouns, if desired, on email signatures and other written communication.

9.14 Translations and other accessible formats are provided when needed. Communication is location-sensitive across countries, dialects, and languages, including braille, sign language, and closed captioning

LEVEL 2: REACTIVE

9.15 DEI communication is done solely to remind or educate employees about adhering to policy and compliance requirements.

9.16 Most DEI communication is disseminated by councils/committees or diversity networks rather than through regular organizational channels and therefore is sometimes seen as not officially endorsed by the organization.

9.17 Language translations are only provided when legally required.

LEVEL 1: INACTIVE

9.18 There is no explicit communication about DEI.

9.19 Discussions on DEI are perceived to be risky and are avoided.

CATEGORY 10: DEI LEARNING AND DEVELOPMENT

Action: Educate all to achieve a level of DEI competence and confidence needed to create a diverse, equitable, and inclusive organization.

Leaders and employees throughout the organization receive DEI training specific to their job and level geared to achieving the organization's goals. Learning and education is also offered to other stakeholders such as vendors, and the public at large. A DEI lens is used to integrate all learning and education programs. The organization uses blended DEI learning and continuously updates and customizes this to changing stakeholder needs. Programs may focus on general DEI and on specific issues such as systemic and structural racism, sexism, ageism, ableism, white supremacy, internalized oppression, classism, heterosexism, prejudice, discrimination (including harassment and bullying), privilege, micro-aggressions, and conscious and unconscious bias, all of which are addressed with sensitivity, conviction, and compassion, and in ways that enhance inclusion and equity.

CATEGORY 10: DEI LEARNING AND DEVELOPMENT

LEVEL 5: BEST PRACTICE

10.1 DEI is integrated into all learning offered internally and externally.

10.2 DEI learning programs result in behaviour change that advances the organization's strategy and enhances inclusion and equity.

10.3 Learning and education addresses racism, anti-racism, sexism, white supremacy, privilege, internalized oppression, classism/casteism, homophobia, transphobia, religious bias, disabilities, mental health awareness, and other issues.

10.4 Development through involvement in high-profile projects is transparent and encouraged for underrepresented groups.

LEVEL 4: PROGRESSIVE

10.5 DEI professionals, experts in learning methods and intercultural education, members of diversity networks, and organizational leaders are involved in the design, development, delivery, workplace application, and evaluation of DEI learning and education.

10.6 DEI content is adapted and customized to the local environment, cultural nuances, languages, and social and political realities.

10.7 DEI learning and education involves ongoing, multi-year, developmental curricula.

10.8 All employees and key external stakeholders are educated on the importance of equity and ways to mitigate and remove discrimination and bias.

10.9 The organization provides training to both current and new suppliers on how to engage and access supplier opportunities.

10.10 A variety of innovative DEI tools including micro-learning, chatbots, gaming, social media, blended learning, coaching, physical classrooms and virtual platforms, and instructor-led learning, are accessible to all employees regardless of level, location, or function.

LEVEL 3: PROACTIVE

10.11 Employees are exposed to and actively seek engagement across organizational functions, as well as externally with diverse markets and stakeholders.

10.12 Experiential learning, including virtual reality and simulations, is used to help employees experience different identities and learn how to best respond to DEI situations.

10.13 The organization ensures that all staff are able to fully participate in virtual meetings, innovative learning methods, and the use of technology.

10.14 All employees and, if needed, their families, receive cultural awareness training when relocating internationally, and when working with international teams.

10.15 The organization encourages cultural celebrations and organization-wide activities that combine social interaction with DEI learning.

10.16 When possible, all training sessions are populated with a diverse group of learners to offer an experience of working with others who represent different diversity dimensions

LEVEL 2: REACTIVE

10.17 DEI learning is brief and focused only on educating employees about policies, meeting legal requirements, or addressing inappropriate language or labels.

10.18 DEI programs are primarily packaged and are not tailored for local and specific cultural needs and issues.

10.19 Learning programs may be offered in reaction to special dates such as women's or pride month, with no linkage to strategy.

LEVEL 1: INACTIVE

10.20 There are no formal DEI learning or educational activities.

CATEGORY 11: CONNECTING DEI AND SUSTAINABILITY

Action: Connect the organization's DEI and Sustainability initiatives to increase the effectiveness of both

The organization connects and aligns DEI and sustainability initiatives. There is a clear link between the organization's sustainability strategy (based on ESG environmental, social, and governance – dimensions or factors) and the UN's Sustainable Development Goals. The strategies for each initiative support the other, and opportunities for collaboration make both initiatives stronger. Leaders and practitioners in sustainability participate in the DEI initiative and vice versa. Both work with diverse stakeholders and report progress to the public

THE SUSTAINABILITY DEFINITION FOR THE GDEIB IS:

Sustainability is the process of simultaneously pursuing:

- societal equity • workplace inclusion
- economic prosperity & • long term environmental health.

Additional definitions and key factors of Sustainability:

For the purposes of the GDEIB, we view the values and desired outcomes of DEI work (See GDEIB page 2, The Ultimate Goals of DEI) as similar to the goals of Sustainability.

1. The definition of Sustainability adopted by the United Nations is "Meeting the needs of the present without compromising the ability of future generations to meet their own needs." To date, 193 world leaders agreed to achieve the United Nations 17 Sustainable Development Goals (SDG's) by 2030 as the framework to achieve sustainability. The 5 Ps that shape the SDGs are People, Planet, Prosperity, Peace, and Partnership.
2. Another definition comes from an African conference delegate: "Enough for all forever."
3. Another related term used by some corporations and the investor community in their advocacy for Sustainability is ESG – Environmental, Social, and Corporate Governance. This refers to the three central factors in measuring sustainability and social impact. These factors embrace the UN concept of "leave no one behind" and invite us to consider this meaning of success: "I succeed when you succeed."

CATEGORY 11: CONNECTING DEI AND SUSTAINABILITY

LEVEL 5: BEST PRACTICE

11.1 DEI is seen as integral to the sustainability of the organization and its stakeholders. Sustainability is fully integrated into DEI strategies/initiatives.

11.2 The organization has evidence that its sustainability and DEI initiatives benefit from their alignment with each other and show more meaningful impact than if they were separate and unconnected.

11.3 The organization takes a leadership role in influencing and supporting the connection of DEI and sustainability initiatives locally and globally including being a champion of ESG and the UN's Sustainable Development Goals.

11.4 The organization adapts its sustainability strategy, policies, and practices based on collaboration with diverse stakeholders.

11.5 The organization's public reporting on sustainability integrates its performance on DEI and includes an accurate assessment of its challenges.

LEVEL 4: PROGRESSIVE

11.6 Innovative digital technologies contribute to the organization's commitment to ESG and the UN's Sustainable Development Goals.

11.7 The organization has a sustainability strategy, which recognizes the link between DEI and sustainability.

11.8 DEI leaders' partner with the organization's sustainability initiative. Likewise, sustainability leaders' partner with the DEI initiative.

11.9 The organization's sustainability data are analyzed and sorted to enable reviewers to determine the impact on diverse groups.

11.10 The organization financially supports DEI and sustainability initiatives, whether global, regional, or local

LEVEL 3: PROACTIVE

11.11 The sustainability strategy proactively and specifically calls for the integration of di- verse voices and perspectives.

11.12 DEI and sustainability professionals receive learning and education to keep up to date with developments both in sustainability and DEI

LEVEL 2: REACTIVE

11.13 There is a superficial effort to connect DEI and the organization's sustainability goals.

LEVEL 1: INACTIVE

11.14 There is no sustainability function or no organizational connection between DEI and sustainability

CATEGORY 12: COMMUNITY, GOVERNMENT RELATIONS, AND PHILANTHROPY

Action: Be proactive in working with community, public and private partnerships, government, society at large, and through philanthropy.

The organization is a recognized leader for supporting and advocating for DEI interests in communities and society, and in working with government. The organization is socially responsible and leverages efforts with industry or sector peers. It is generous in partnering with or supporting other organizations in their DEI initiatives to advance DEI in the community.

Where appropriate, special efforts are made to acknowledge indigenous communities and to respect their territory and adhere to legal and cultural requirements when entering their space. Employees are encouraged to participate in and support various community projects, share DEI learning from such activities, and reinforce the organization's commitment to DEI. These efforts are explicitly linked to the organization's sustainability strategy.

CATEGORY 12: COMMUNITY, GOVERNMENT RELATIONS, PHILANTHROPY

LEVEL 5: BEST PRACTICE

12.1 The organization is explicit in living its DEI values and actively supports, invests in, and advocates for DEI-related initiatives in the community, government, and society at large.

12.2 The organization takes bold stands in word and action on societal issues related to achieving equity and justice for marginalized people, such as #BlackLivesMatter, #MeToo, #Genderbasedviolence, #UnitedAgainstRacism, and #Standup4humanrights.

12.3 The organization has addressed and atoned for any past behaviours and policies with regard to the mistreatment of people.

12.4 The organization helps its community by promoting economic growth, addressing income inequality and groups that have been historically disadvantaged.

12.5 The organization encourages employee volunteerism in community projects by providing time off and/or compensation and rewards where appropriate.

LEVEL 4: PROGRESSIVE

12.6 The organization's philanthropy and social responsibility strategies promote DEI.

12.7 The organization's community investment supports those most in need.

12.8 The organization supports scholarship, paid internship programs and/or apprenticeships for underrepresented populations.

12.9 Employees are encouraged to volunteer in their community. In some cases, the organization "loans" them to work for community organizations or matches their volunteer hours with monetary contributions.

12.10 Community development plans are designed in collaboration with diverse groups, including those from underrepresented or marginalized groups.

12.11 The organization uses objective criteria to fund nonprofit organizations to ensure that bias in philanthropy is mitigated

LEVEL 3: PROACTIVE

12.12 The organization partners with other organizations that work to advance the rights of underrepresented groups in the community.

12.13 The organization supports DEI publicly when exclusionary and discriminatory actions occur in the community or society at large.

12.14 Individuals who have made a significant difference with DEI in their communities are recognized and honoured by their organization.

LEVEL 2: REACTIVE

12.15 There is some involvement in or support for societal DEI issues but only if considered non-controversial.

12.16 There is some support for the community, schools, and/or local government projects, primarily for public relations purposes.

LEVEL 1: INACTIVE

12.17 There is no involvement or support provided to community, government, and societal initiatives related to DEI.

12.18 The organization has no philanthropy.

CATEGORY 13: SERVICES AND PRODUCTS DEVELOPMENT

Action: Embed DEI in services and products development to serve diverse customers and clients.

DEI considerations are integrated into the services and products development cycle to leverage the diversity of the communities they serve. The process contributes to social and economic progress and eliminates or reduces inequities. Service or product development teams are diverse and include customers, stakeholders, and community representatives. Recognition is also given to the value of DEI in innovation, and the organization consistently leverages the diversity of cultures, lived experiences, perspectives, and thought for product and service improvement

CATEGORY 13: SERVICES AND PRODUCTS DEVELOPMENT

LEVEL 5: BEST PRACTICE

13.1 The organization successfully leverages diverse teams, including diversity networks, customers, partners, the community, and other stakeholders, to improve its products and services.

13.2 The product and service development cycles prioritize diversity and accessibility from the start. The organization doesn't merely adapt products first developed for the dominant group or culture.

13.3 The organization contributes to equity by creating services and products that advance social and economic progress.

13.4 Humane and ethical technology is used to ensure access and equity, for example in inclusive facial recognition systems.

13.5 Voice and facial recognition software is sensitive to accents, dialects, gender, race/ethnicity, age, and other characteristics

LEVEL 4: PROGRESSIVE

13.6 Changes in demographics, values, and consumer behaviours are researched, anticipated, and addressed.

13.7 Culturally responsive products and services, such as engaging a traditional healer in a hospital, Sharia-compliant financial products, and products for left-handed users, are accepted and provided.

13.8 The organization leverages diverse teams to improve the quality and innovation of products and services

LEVEL 3: PROACTIVE

13.9 Products and services are analyzed for their value to current and potential customers and are tailored appropriately.

13.10 Staff and/or consultants with expertise in DEI are involved in products and services development.

13.11 Research and product testing help analyze how different customer/stakeholder groups and cultures may perceive, value, and use the organization's products and services.

13.12 Accessibility for persons with disabilities is routinely considered in the development and delivery of products and services.

LEVEL 2: REACTIVE

13.13 There is limited interest in developing or altering products and services based on customer preferences, needs, or demographics.

13.14 Only when required by law is there adaptation of services and products for accessibility.

LEVEL 1: INACTIVE

13.15 No effort is made to adapt products or services for diverse customers.

13.16 Development teams are mostly homogenous.

CATEGORY 14: MARKETING AND CUSTOMER SERVICE

Action: Integrate DEI into marketing and customer service.

Marketing and customer service strategies meet the needs of diverse groups. Sophisticated market analysis techniques are deployed on an ongoing basis to understand the organization's diverse customer and stakeholder base. The organization uses DEI relevant marketing and customer service approaches within and across countries, regions, cultures, generations, and languages.

Marketing and advertising strategies are inclusive and challenge stereotypes. While outside DEI expertise may sometimes be sought, the organization leverages the expertise of its diverse staff. Accessibility and cultural sensitivity are incorporated into the process of design and development of all marketing materials and customer service strategies.

CATEGORY 14: MARKETING AND CUSTOMER SERVICE

LEVEL 5: BEST PRACTICE

14.1 The organization uses advanced and unbiased analysis techniques to understand and respond to the diversity of its customer base, including nuances of intersectionality.

14.2 Artificial intelligence-based customer service applications, such as personal assistants, are programmed to speak to people in ways they prefer and can understand, such as gender, language, accent, and dialect.

14.3 Marketing strategies developed for specific communities are tracked to ensure they are culturally relevant and valued.

14.4 While outside DEI expertise may also be sought, the organization leverages the marketing, sales, distribution, and customer service expertise of its diverse staff.

LEVEL 4: PROGRESSIVE

14.5 The organization successfully incorporates marketing, sales, and distribution strategies to meet the needs of diverse customers.

14.6 All marketing materials, including images and language are reflective of the organization's commitment to DEI.

14.7 Marketing, advertising, public relations, and all customer contact methods promote positive role models and do not perpetuate stereotypes.

14.8 The marketing and sales force is interculturally competent and can adapt and work effectively with customers from many backgrounds.

14.9 All marketing and customer service processes are fully accessible.

LEVEL 3: PROACTIVE

14.10 Diverse groups of customers and potential customers are surveyed to help shape marketing, sales, distribution, and customer service strategies.

14.11 Market testing includes diverse groups.

14.12 Inclusion of various diversity dimensions is a strong consideration in staffing marketing and customer service.

14.13 Marketing collateral print and digital materials represent and reflect diverse markets.

LEVEL 2: REACTIVE

14.14 The organization only recognizes broad differences among its customers, such as young and old or men and women.

14.15 Even if products and services are marketed differently to different groups, the advertising is not culturally sensitive.

14.16 Customer service and marketing are accessible for persons with disabilities only where required by law

LEVEL 1: INACTIVE

14.17 No oversight exists to ensure that advertising or public communications do not perpetuate stereotypes.

14.18 There are no marketing or customer service initiatives to serve the diverse needs of customers.

CATEGORY 15: RESPONSIBLE SOURCING

Action: Practice responsible and ethical sourcing.
Develop and nurture underrepresented suppliers

Responsible and ethical sourcing refers to a commitment to purchase a significant percentage of goods and services from organizations committed to high standards in DEI, sustainability, ethical behaviour, and Fair Trade.

Further, the organization supports its current and potential suppliers in maintaining high standards through education and systems that enable them to compete equitably with other suppliers—the ultimate goal being to create sustainable, successful, and prosperous societies.

CATEGORY 15: RESPONSIBLE SOURCING

LEVEL 5: BEST PRACTICE

15.1 The organization has embedded DEI in its responsible and ethical sourcing as evidenced by its policies, systems, and inclusive practices.

15.2 The organization treats its suppliers with respect and dignity, pays them in a timely manner and collaborates with them to make the supply process work for all.

15.3 The economic benefit of responsible sourcing to the community is measured and reported.

15.4 The organization's suppliers provide evidence that both they and their suppliers achieve their own DEI goals.

LEVEL 4: PROGRESSIVE

15.5 The organization allocates a specific amount of what it spends on essential and non-essential goods and services from under-represented suppliers.

15.6 The organization is proactive in seeking and attracting underrepresented groups by informing both potential and established suppliers about business opportunities.

15.7 DEI criteria are included in the supplier selection process and given weight in decision-making.

15.8 Checks and balances are built into the responsible and ethical sourcing process to counteract the impact of unconscious bias and discrimination.

15.9 Educational support and coaching is provided to underrepresented suppliers to help them be competitive.

15.10 The organization publishes information about its annual expenditures with underrepresented suppliers including progress against goals, and successful contracting rates.

LEVEL 3: PROACTIVE

15.11 All staff responsible for sourcing are pro- vided with DEI education and are held account- able for achieving responsible sourcing goals.

15.12 The organization's supplier database includes information about the diversity of owners and employees that supply goods or services.

15.13 The organization uses the services of organizations globally /nationally/locally that certify or accredit businesses owned by underrepresented suppliers and that regulate Fair Trade.

15.14 The organization seeks opportunities to engage with and inform underrepresented suppliers that their business is welcomed.

LEVEL 2: REACTIVE

15.15 Engaging in DEI may be a supply proposal criterion, but it is given minimal importance.

15.16 There is some attempt to include a few underrepresented suppliers, but primarily for small, one-time, or low-fee contracts or because it is required by law.

LEVEL 1: INACTIVE

15.17 No consideration is given to DEI when determining suppliers.

15.18 There is no recognition of the value that underrepresented suppliers could bring to the organization.

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