



## HALTON EQUITY & DIVERSITY ROUNDTABLE

# Organizational Self- Assessment Tool

Revised: January 2024

The journey towards equity, diversity, and inclusion involves a thoughtful self-assessment process, where organizations delve into their practices and cultural nuances using a variety of indicators. Recognizing the uniqueness of each organization, the flexibility to incorporate additional indicators ensures a tailored evaluation. Evidence plays a pivotal role in this introspective journey, offering validation and reducing subjectivity. From policies and reports to feedback from staff and external demographic data, the sources of evidence are diverse.

The self-assessment covers key areas such as Organizational Foundation, Leadership, Service Delivery, Personnel Practices, Communication, and Performance Improvement, providing a holistic view of the organization's commitment to inclusivity. Scoring is not just about the actions taken but also about the robustness of the evidence presented. A score of 3 signifies substantial progress with convincing evidence, while 2 indicates partial progress with ongoing efforts and some evidence. A score of 1 suggests minimal progress but acknowledges the initiation of conversations or planning.

In the section titled "Actions Planned," organizations are given the space to articulate their aspirations and challenges on the road to becoming more inclusive. This forward-looking perspective allows for a human touch, acknowledging that each organization's path is unique. For instance, in the context of small businesses, conventional metrics like the board of directors might not be applicable.

This self-assessment process is not just a scoring exercise; it's a narrative of an organization's commitment to fostering equity, diversity, and inclusion, one that unfolds through actions, evidence, and a shared vision for the future.

## How To Use The Tool

**Indicators** assess the practices and organizational culture with regard to equity, diversity, and inclusion. Not all indicators apply to all organizations, and additional indicators relevant to the organization may be added.

**Evidence** is a key part of the self-assessment. Identifying appropriate sources of evidence supports and proves the work that has been done, and reduces the influence of subjectivity.

There may be many various sources of evidence, which could include:

- Policies or statements
- Annual reports
- Strategic planning documents
- Action plans that show designated responsibilities
- Work plans with actions proposed and taken
- Feedback or surveys from staff, persons served, stakeholders or focus groups
- External demographic data
- Contracts
- Promising practices that have been adopted and documented
- Performance reviews/ appraisals
- Trainings completed

**Actions Planned** gives flexibility to organizations to express their journey in becoming a more inclusive organization. This is the section where future plans or goals or challenges can be shared. An example: in the case of small businesses, board of directors does not apply.

### Scoring:

<b>3</b>	<b>substantial</b> – some actions have been taken and there is good evidence
<b>2</b>	<b>partial</b> – actions have started or are in progress with some evidence
<b>1</b>	<b>minimal</b> – action is intended and conversations or planning has begun



## Areas of Assessment

**Organizational Foundation:** This area evaluates the fundamental principles and values that underpin the organization, examining how these align with and promote equity, diversity, and inclusion. It explores the core beliefs and mission that set the tone for the organization's culture.

**Leadership:** Leadership assessment focuses on how leaders within the organization actively promote and embody principles of equity, diversity, and inclusion. This includes evaluating leadership commitment, communication, and actions that contribute to creating an inclusive environment.

**Personnel Practices:** This area delves into how the organization manages its workforce, covering aspects such as hiring, promotion, training, and employee relations. It assesses whether personnel practices are fair, unbiased, and support diversity and inclusion.

**Service Delivery:** Service Delivery assessment looks at how the organization ensures equitable access to its services or products. This involves evaluating policies, procedures, and practices to ensure they are inclusive and meet the diverse needs of the intended audience or clientele.

**Communications:** Communications assessment examines how the organization communicates its commitment to equity, diversity, and inclusion both internally and externally. It considers the language used, channels of communication, and the inclusivity of messaging.

**Performance Improvements:** This area assesses the organization's commitment to ongoing improvement in terms of equity, diversity, and inclusion. It examines whether there are processes in place for continuous evaluation, learning, and adaptation to foster a more inclusive environment.

Each of these areas contributes to the overall understanding of an organization's inclusivity, providing a comprehensive view of its strengths, weaknesses, and areas for improvement. The self-assessment process encourages organizations to reflect on their practices, fostering a culture of continuous growth and development in the realm of equity, diversity, and inclusion.





INDICATORS	EVIDENCE	ACTIONS PLANNED	SCORE
Diversity and inclusion are embedded within the mission and strategy and are key values.			
All levels of the organization (e.g. Board of Directors, leadership, staff and volunteers) demonstrate that diversity and inclusion are aligned with the mission and vision.			
All levels of the organization (e.g. Board of Directors, leadership, staff and volunteers) reflect the diverse community and are selected according to specific skills and competencies.			
Organizational strategic and business planning have incorporated diversity and inclusion objectives.			
Relevant demographic data from community assessments have been used to establish targets and support planning.			
Organizational policies and strategic planning have included input from staff and stakeholders and is communicated to staff and stakeholders.			
Outcomes implementing inclusion practices are promoted, measured, analyzed and reported on regularly for the purpose of improvement and transparency.			
Organizational culture provides a positive experience and welcoming, inclusive environment for both employees and clients/ persons served (e.g. organizational practices align with the written policies and procedures)			



INDICATORS	EVIDENCE	ACTIONS PLANNED	SCORE
Senior leaders are role models in their discussions and actions in diversity and inclusion practices.			
Leaders support and are actively involved in equity and diversity networks.			
Leaders encourage inclusion ideas recommended by employees, volunteers, persons served, and stakeholders.			
Leaders respond to challenging issues, such as conflicting rights or unconscious bias.			
Leaders ensure that policies, including policies and practices of inclusion and equity, are communicated to the Board, committees, groups, staff, volunteers, personnel, and persons served.			
Leaders are equipped with inclusive leadership skills needed for diverse work teams.			



INDICATORS	EVIDENCE	ACTIONS PLANNED	SCORE
Employment practices including recruitment, retention, advancement, compensation and job classifications are fair, equitable and inclusive.			
Employment opportunities are advertised using various channels including diverse, community networks to encourage applicants from all communities.			
Opportunities for advancement and skill development are equally available and based on competency.			
Requests for flexible work arrangements for appropriate positions are responded to with consideration and without negative impact to career development, service delivery or job performance.			
There are reasonable accommodations made for schedules, holidays or leaves and these are regarded as fully legitimate.			
Job descriptions are clear and do not include factors such as appearance preferences. If specific characteristics are mentioned, such as gender or age, it is to increase the equitable outcomes for a marginalized population.			
Diversity and inclusion are emphasized in continuous training and education, providing employees and leaders with skills in inclusion competency.			



INDICATORS	EVIDENCE	ACTIONS PLANNED	SCORE
Employees and their partners are included in organizational events.			
Employment practices and policies are regularly reviewed and updated to ensure equity and inclusion are advanced.			
Employees are supported in their professional development.			



INDICATORS	EVIDENCE	ACTIONS PLANNED	SCORE
Accessible facilities allow all users to have full access to services.			
Accessible customer services policies and practices (Ontario Regulation 429/07) allow people to be served with independence, dignity, integration and equality of opportunity.			
Community consultation and stakeholder input is encouraged and analyzed for equity practices within current services and proposed services.			
Consultation mechanisms such as surveys or ratings/measures of services are used to establish needs and satisfaction levels of diverse group service users.			
Practices are in place to review the implications for diverse group service users or prospective users, in order to increase, decrease, or reallocate funding.			
Written procedures are in place to attend to complaints, comments or suggestions regarding service delivery.			
There are adequate resources for full implementation of actions needed or identified to ensure service delivery with diverse and inclusionary practices.			
Contracts or partnerships with external organizations or suppliers include requirements to deliver services equitably and without discrimination, and systematic checks ensure that there are no systemic barriers.			





INDICATORS	EVIDENCE	ACTIONS PLANNED	SCORE
Current data and reports on demographic data are made available throughout the organization.			
The commitment to diversity and inclusionary practices is actively endorsed regularly to the public and to stakeholders through all forms of communication.			
Mechanisms have been established to ensure and enhance communications available in languages, based on relevant language priorities.			
Outreach and public events positively reflect diversity.			
Information, publications, and visual or written portrayals of individuals or groups are inclusive, written in plain language and portray positive, inclusive images			
Demographic data is collected for the purposes of improving services through knowledgeable planning and evaluation.			



INDICATORS	EVIDENCE	ACTIONS PLANNED	SCORE
Leadership develops a framework, such as a Diversity and Inclusion Plan, which is regularly reviewed and updated.			
There is a mechanism for identifying and eliminating barriers that may prevent individuals from accessing services.			
Annual diversity and inclusion progress reports are widely disseminated through regular reporting and accessible to the public.			
Equity, diversity and inclusion work is embedded in staff performance reviews.			
Promising practices in equity, diversity and inclusion work are shared with the broader community, including HEDR.			

# Summary

AREAS FOR SELF-ASSESSMENT	SCORE	POSSIBLE SCORE
Organizational Foundation		24
Leadership		18
Personnel Practices		30
Service Delivery		24
Communication		18
Performanc Improvement		15
Total		129

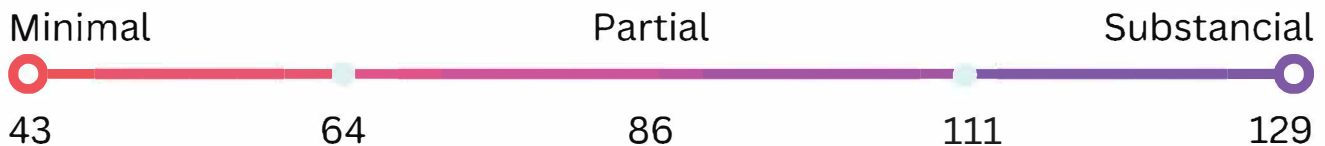
### Directions:

1. For each area of assessment scoresheet, determine total score and add it to the chart.
2. Add the scores together for an overall total.
3. Plot your score on the linear scale to see where you stand overall.
4. Identify your priority area(s).

### Need Assistance? Contact us!

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### Where do you stand overall?



### What are your priority area(s)?

<input type="checkbox"/>	<input type="checkbox"/>
_____	_____
<input type="checkbox"/>	<input type="checkbox"/>
_____	_____
<input type="checkbox"/>	<input type="checkbox"/>
_____	_____

Date of Assessment: \_\_\_\_\_

Name of person(s) completing the assessment: \_\_\_\_\_





## Tips on Embedding EDI

Improving diversity, equity, and inclusion (DEI) in organizations requires a comprehensive and sustained effort across various aspects. Here are specific strategies for each area mentioned:

### Organizational Foundation

- **Mission and Values Alignment:** Ensure that the organization's mission and values explicitly incorporate a commitment to diversity, equity, and inclusion.
- **Leadership Commitment:** Obtain visible commitment from top leadership to DEI principles, setting the tone for the entire organization.
- **Training and Education:** Provide ongoing training to employees at all levels to reinforce the importance of DEI and ensure understanding of the organizational values.

### Leadership

- **Leadership Development:** Implement programs that focus on developing leaders who understand and champion diversity and inclusion.
- **Accountability Measures:** Establish metrics and performance indicators tied to DEI goals, holding leaders accountable for progress.
- **Transparent Communication:** Encourage leaders to communicate openly about their commitment to DEI, sharing successes and challenges.

### Personnel Practices

- **Diverse Recruitment:** Implement diverse and inclusive recruitment strategies to attract a broad range of candidates.
- **Unbiased Evaluation:** Regularly review and update personnel practices to eliminate bias in hiring, promotions, and performance evaluations.
- **Inclusive Training:** Provide ongoing diversity and inclusion training for all employees, ensuring a culture of continuous learning.



## Service Delivery

- **Diversity in Product/Service Development:** Include diverse perspectives in the development of products or services to ensure they meet the needs of a diverse audience.
- **Accessibility Standards:** Establish and adhere to accessibility standards to ensure equitable access for all customers.
- **Regular Audits:** Periodically audit service delivery processes to identify and address any disparities or barriers.

## Communications

- **Inclusive Language:** Use inclusive language in all internal and external communications to demonstrate commitment to diversity.
- **Transparency:** Communicate openly about DEI efforts, progress, and challenges, fostering trust and accountability.
- **Employee Resource Groups:** Establish and highlight employee resource groups that contribute to the organization's diversity narrative.

## Performance Improvements

- **Feedback Mechanisms:** Establish regular feedback mechanisms to gather insights from employees regarding DEI initiatives.
- **Continuous Learning Culture:** Foster a culture of continuous improvement by encouraging ongoing education and awareness programs.
- **Adaptation Strategies:** Be willing to adapt policies and practices based on feedback and evolving best practices in the DEI field.

By integrating these strategies into each area, organizations can create a more inclusive and equitable environment, fostering diversity and promoting sustained improvement in DEI initiatives.

# Goals for Improvement

Goal	Measures of Success	Person(s) Responsible	Timelines

## Endorsement

This plan is endorsed, on \_\_\_\_\_ by:

\_\_\_\_\_  
Name:  
Title:

\_\_\_\_\_  
Name:  
Title:



# JOIN THE MOVEMENT

HEDR invites individuals, businesses, non-profit organizations, educational institutions, and government agencies within Halton to become members and actively participate in this transformative journey. By joining HEDR, members stand united in their dedication to building a society where every individual feels valued, respected, and included, regardless of their background or identity. Together, the Halton Equity Diversity Roundtable is igniting change, creating a more just and equitable future for all, and setting an inspiring example for other communities to follow.

## Membership Advantages

Joining the HEDR Membership offers numerous advantages for individuals, organizations, and businesses committed to promoting equity, diversity, and inclusion. Some of the key advantages include:

- Networking Opportunities
- Access to Resources and Expertise
- Amplified Impact
- Advocacy and Influence
- Community Engagement

## Member Expectations

- Endorse HEDR Charter on an annual basis.
- Adhere to our Code of Conduct.
- Actively contribute their expertise, resources, and individual experiences to further the goals of HEDR.
- Bring forward issues and information regarding inclusion, access and diversity to HEDR.
- Attend meetings regularly. Regular attendance is defined as a minimum of 3 membership meetings annually.
- Complete a minimum of 20 hours of DEI Education and Training each year.
- To maintain an atmosphere of respectful discussion and professionalism and respect the confidentiality of all matters brought to HEDR.

# APPLY FOR A MEMBERSHIP

LEARN MORE ONLINE AT [WWW.HEDROUNDTABLE.COM/MEMBERSHIP](http://WWW.HEDROUNDTABLE.COM/MEMBERSHIP)



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## HALTON EQUITY & DIVERSITY ROUNDTABLE



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