GDIB Assessment Checklists

• Leader Guide
• Participant Materials

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Version No. AC1017
LEADER GUIDE
FOR
GDIB ASSESSMENT CHECKLISTS

For use with
Global Diversity & Inclusion Benchmarks: Standards for Organizations Around the World (GDIB)

The GDIB and the Checklists are free to use; however, permission is required. Go to www.centreforglobalinclusion.org and navigate to Global D&I Benchmarks.

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GDIB Assessment Checklist Leader Guide – AC1116
GDIB Assessment Checklists Leader Guide

Below is a simplified method for doing a D&I Needs Assessment using the Global Diversity & Inclusion Benchmarks (“GDIB”). There is a significant amount of information available in the Organization Development and Management literature on conducting a D&I Needs Assessment—an important, strategic component of D&I work.

Assessment is not a perfect science. No assessment tool will be perfectly accurate because achieving pure objectivity is not possible. Although there is not a lot to be gained by discussing whether a rating should be 3.4 or 3.2, a difference between 4.0 and 2.5 does merit further discussion and analysis. Our recommendation: use the scores to facilitate conversation with examples and to focus on a plan to improve what you do.

The GDIB can be customized and some portions of it may be changed, but customization must be approved. The authors—Julie O'Mara and Alan Richter who solely own the rights and hold the copyright—will determine the degree of changes that can be made before changes become too significant beyond the intention and integrity behind the Expert Panelists’ opinions and recommendations.

Implementation Steps and Tips

1  Prepare.

   Thoughtfully read the entire GDIB. To access the GDIB, The Centre website (www.centreforglobalinclusion.org) and navigate to Global D&I Benchmarks. Return frequently to review new postings. Collecting accurate information and basing D&I work on an accurate assessment is crucial to ensuring that the outcome will be credible and useful to the organization. Although the GDIB is designed to be used without highly-skilled consultants or expert assistance, if you don’t have experience designing and conducting a needs assessment, consider asking someone with assessment experience to coach or assist you. The GDIB Expert Panelist biographical summaries and contact information can be accessed here: www.centreforglobalinclusion.org. You may contact any of the Expert Panelists independently.

2  Develop a Plan for Management Approval.

   Make decisions on how to address all steps below and, if appropriate, write a plan or proposal for review by your management. We recommend constructing a plan/proposal in a manner acceptable to, or prescribed by, your organization in as much detail as expected, including time parameters, responsibilities, accountability and projected costs. As you plan, consider your organizational culture and practices, compliance and regulatory requirements, confidentiality guidelines and practices and possible disclosure requirements, the right to privacy, reporting of violations or infractions, and other items that may affect data collecting and reporting. It may be helpful to consult with your general counsel or legal representative for advice. Include statements about confidentiality protection; identifying parties who will see all or some portions of the data; and how the information will be used. Be sure the plan includes clear communication and adherence to organizational agreements regarding data collection and use.
3 Determine Who to Involve and How to Sort and Organize the Data.

For some of these decisions, there will be a cost factor. The more groups you engage, the more time and cost is involved, but you will potentially obtain more comprehensive data. Some organizations choose to involve employees at every position level; other organizations will be more selective. Some choose to collect and analyze the data by identity or other types of groups. For example, you may want to separate various organizational departments or position levels, regions or locations, or separate groups by gender, age, ethnicity, and so forth. However, avoid groups that are too small because individuals may be easily identified, causing confidentiality agreements to potentially be violated. Identify participants with disabilities who may be participating in the process and make accommodation for them, if deemed appropriate.

4 Determine Which GDIB Categories to Assess.

Consider completing all 14 GDIB Category Checklists because the GDIB is comprehensive and functions as a system. However, it may not be practical for your organization to ask participants to complete all the Checklists. For example, you may not have a Sustainability program (Category 10) or a Supplier Diversity Program (Category 14) and you may want to exclude those. For some larger or more structurally complex organizations, some Categories may be more effectively applied at an enterprise or headquarters level rather than regional or local level. We recommend making those decisions prior to conducting the assessment.

5 Determine the Process.

You have many options. We recommend the following as the preferred way for your organization to collect and analyze assessment data.

→ Use a skilled, knowledgeable facilitator.
→ Ask individual participants to complete the Checklists prior to attending the meeting and then refer to the Checklists during the meeting.
→ Form discussion groups of 5 to 7 persons. They may be diverse (including cross-functional) groups or a group similar in diversity dimensions (such as age or gender identity), location, position level or other similarity.
→ Encourage individuals to discuss their ratings in each Category and share examples that describe how the organization is accomplishing a benchmark. Ask them to gain consensus on their rating on each Category. It may be challenging for some groups to reach consensus. First remind the group that consensus does not entail total agreement. However, if there is significant disagreement, that will need to be addressed before proceeding with action steps. The consensus agreed to by the group could be stated as a single number or a range.
→ Collect the consensus ratings from each small group, along with examples.
→ Facilitate a large group conversation to reach group consensus across all the smaller groups.
6 **Determine and Collect Additional Data as Part of the Overall D&I Needs Assessment Process.**

Consider using the following additional data gathering methods:
- Individual interviews of selected leaders
- Focus Groups
- Employee Opinion Survey results
- Supervisor and/or Manager Opinion Survey results
- Other data that relates to the organization, such as retention and turnover, sales data, advertising results, grievances, and social media comments.

7 **Analyze and Report the Data with Recommendations.**

Consider convening a diverse team to analyze the data and make recommendations. When a diverse team is used (including diversity dimension, organizational unit/function, location, position level and others), it is usually more likely that the recommendations will be relevant, accepted and implemented. Implementing this step and communicating before you collect the data is recommended, so you can align expectations with your objectives from the beginning.

Thank you for using the GDIB Assessment Checklist in your organization.

Julie O’Mara and Alan Richter, Ph.D.
GDIB Co-Authors of the GDIB, and
95 Expert Panelists who participated in the research to develop the GDIB

For general information about the Global Diversity and Inclusion Benchmarks, go to www.centreforglobalinclusion.org

**ACKNOWLEDGEMENTS**

We thank GDIB Expert Panelist Lorelei Carobolante, Global MBA, G2nd Systems, who served as co-designer of this GDIB Assessment Checklist package, and the following individuals who participated in the field test and provided feedback:

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Stéphane Patry
Tatiana Revilla Solís, Ph.D.
Saskia Wustefeld

Version No. AC1017
PARTICIPANT MATERIALS FOR GDIB ASSESSMENT CHECKLISTS

Use with the
Global Diversity & Inclusion Benchmarks: Standards for Organizations Around the World (GDIB)

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GENERAL INSTRUCTIONS FOR PARTICIPANTS

See specific instructions on each Category Checklist.

The Assessment Leader in your organization has communicated with you regarding the following items:

- Why the organization is conducting this D&I Needs Assessment and what it hopes to accomplish.
- Why you have been selected to participate in this process.
- How the information collected will be used and with whom it will be shared.
- What you can expect of the process and how much time it will take.
- Whether you are assessing the entire organization, or a unit, function, department or other segment or group in the organization.
- Which of the 14 GDIB Categories you are assessing.
- What to do if you are confused or don’t know or understand an item, or don’t have an opinion.
- What to do after you finish completing the Checklists.
- Who to contact if you have questions.

Use these GDIB definitions to help you:

LEVEL 5: BEST PRACTICE
Demonstrating current best practices in D&I; exemplary for other organizations globally.

LEVEL 4: PROGRESSIVE
Implementing D&I systemically; showing improved results and outcomes.

LEVEL 3: PROACTIVE
A clear awareness of the value of D&I; starting to implement D&I systemically.

LEVEL 2: REACTIVE
A compliance mindset; actions are taken primarily to comply with relevant laws and social pressures.

LEVEL 1: INACTIVE
No D&I work has begun; diversity and a culture of inclusion are not part of organizational goals.

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GDIB Assessment Checklist

CATEGORY 1: D&I VISION, STRATEGY, AND BUSINESS CASE

Instructions for completing this Checklist:

Incorporating the information provided by your Assessment Leader,
1. Please fill in the square (☐) for ALL items you agree are mostly true in your organization. No organization is perfect. Therefore, fill in the square if you agree that the item is generally true.
2. If you are confused or are uncertain, place a question mark (?) in the square.
3. If you believe the item is untrue or mostly untrue, do not fill in the square; leave it open.

We estimate this Checklist will take you approximately 5 minutes to complete.

LEVEL 5: BEST PRACTICE
☐ 1.1 D&I 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.
☐ 1.2 All the major components of D&I work, including vision, strategy, business case or rationale, goals, policies, principles, and competencies, are regularly reviewed.
☐ 1.3 The D&I strategy contributes to specific accomplishments and the organization’s overall success in observable, measurable ways.
☐ 1.4 The organization is known as a leader in D&I and is frequently acknowledged, cited, and benchmarked for its pioneering D&I accomplishments.

LEVEL 4: PROGRESSIVE
☐ 1.5 The organization’s D&I vision and goals, as well as the requirement to embed equity, prevent harassment, and reduce discrimination, are fully supported and rewarded.
☐ 1.6 The majority of stakeholders acknowledge that D&I is important for contributing to the success of the organization.
☐ 1.7 D&I competencies that help achieve the D&I strategy are demonstrated by a majority of employees.
☐ 1.8 D&I is well integrated into the organization’s strategy.

LEVEL 3: PROACTIVE
☐ 1.9 The organization has examined its systems, practices, requirements, and organizational culture and created strategies to reduce barriers to inclusion.
☐ 1.10 A compelling D&I vision, strategy, and business case has been developed and communicated to all employees. It describes the multiple ways that individuals, teams, and the organization benefit from D&I.
☐ 1.11 D&I is defined broadly to include dimensions beyond gender, age, disability, and other characteristics.
☐ 1.12 D&I qualitative and quantitative goals that include input from a variety of internal and external stakeholders are being developed.

See Page 2 of Category 1 Checklist. ➔
LEVEL 2: REACTIVE
☐ 1.13 If a D&I strategy exists, it is limited only to human resource functions.
☐ 1.14 D&I is narrowly defined, referring only to some underrepresented groups. The focus is primarily on numbers of people from various groups represented at different organizational levels.
☐ 1.15 Equal opportunity, disability access, age discrimination, or other diversity-related policies have been adopted primarily to meet compliance requirements and prevent damaging legal action or publicity.

LEVEL 1: INACTIVE
☐ 1.16 There is no D&I vision, strategy, imperative, business case, goals, policies, principles, or program.
☐ 1.17 There is no linkage of D&I to the vision, mission, and goals of the organization.

SCORING
Based on your responses above, please make a judgement as to which level you believe your organization generally operates. There is no mathematical calculation to use to determine this. Generally, the level to state is where you have filled in most of the squares. If that is Level 3, then chose that one. If it is half Level 4 and half Level 5, then indicate 4.5 in the choices below.

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Your Assessment Leader may have given you additional instructions. If so, follow those instructions.

Complete, if requested by your Assessment Leader:

Name_________________________________________________________
Group Identifier/Code_____________________________________________
Date____________________________________________________________

Thank you for your participation. Please contact your Assessment Leader if you have questions.
GDIB Assessment Checklist

CATEGORY 2: LEADERSHIP AND ACCOUNTABILITY

Instructions for completing this Checklist:

Incorporating the information provided by your Assessment Leader,
  1. Please fill in the square (☐) for ALL items you agree are mostly true in your organization. No organization is perfect. Therefore, fill in the square if you agree that the item is generally true.
  2. If you are confused or are uncertain, place a question mark (?) in the square.
  3. If you believe the item is untrue or mostly untrue, do not fill in the square; leave it open.

We estimate this Checklist will take you approximately 5 minutes to complete.

LEVEL 5: BEST PRACTICE
☐ 2.1 A large majority of employees across an array of diversity dimensions rate their leaders as treating them fairly and inclusively.
☐ 2.2 Management performance, pay, bonuses, and promotions are tied to a variety of D&I indicators.
☐ 2.3 Leaders are seen as change agents and role models and inspire others to take individual responsibility and become role models themselves.
☐ 2.4 Leaders and board members publicly support internal and external diversity-related initiatives, even if they are perceived to be controversial.
☐ 2.5 Leaders and board members understand that D&I is systemic. They are fully committed to holding people at all levels accountable for achieving the D&I objectives.

LEVEL 4: PROGRESSIVE
☐ 2.6 Leaders are involved in D&I initiatives, communicate the D&I strategy, and provide recognition for D&I champions and advocates.
☐ 2.7 Leaders hold themselves and others responsible for achieving the D&I goals and objectives.
☐ 2.8 The board of directors is diverse, is engaged in D&I issues, and holds the leadership team accountable for achieving the D&I strategy.
☐ 2.9 Managing D&I is an essential leadership competency and leaders are rated on it.

LEVEL 3: PROACTIVE
☐ 2.10 Leaders are knowledgeable about D&I and accept managing D&I as one of their responsibilities.
☐ 2.11 Leaders willingly write and speak internally and publically about the organization’s D&I efforts.
☐ 2.12 Leaders engage in D&I issues important to employees and are actively involved in diversity networks.

See Page 2 of Category 2 Checklist.
☐ 2.13 To increase their knowledge and competence, leaders seek coaching in D&I and provide coaching and mentoring to others.

**LEVEL 2: REACTIVE**

☐ 2.14 Leaders are generally unfamiliar with D&I and require instructions or scripts to discuss it.

☐ 2.15 Although leaders accept some responsibility for D&I, the focus is mainly on compliance.

☐ 2.16 Leaders consistently avoid or are reluctant to address challenging D&I situations.

**LEVEL 1: INACTIVE**

☐ 2.17 There is little or no leadership involvement or accountability for D&I.

☐ 2.18 Leaders consistently see differences primarily as problematic rather than as opportunities for enrichment, progress, and success.

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**SCORING**

Based on your responses above, please make a judgement as to which level you believe your organization generally operates. There is no mathematical calculation to use to determine this. Generally, the level to state is where you have filled in most of the squares. If that is Level 3, then chose that one. If it is half Level 4 and half Level 5, then indicate 4.5 in the choices below.

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Your Assessment Leader may have given you additional instructions. If so, follow those instructions.

Complete, if requested by your Assessment Leader:

Name_________________________________________________________

Group Identifier/Code_____________________________________________

Date __________________________________________________________

Thank you for your participation. Please contact your Assessment Leader if you have questions.
GDIB Assessment Checklist

CATEGORY 3: D&I STRUCTURE AND IMPLEMENTATION

Instructions for completing this Checklist:

Incorporating the information provided by your Assessment Leader,
1. Please fill in the square (☐) for ALL items you agree are mostly true in your organization. No organization is perfect. Therefore, fill in the square if you agree that the item is generally true.
2. If you are confused or are uncertain, place a question mark (?) in the square.
3. If you believe the item is untrue or mostly untrue, do not fill in the square; leave it open.

We estimate this Checklist will take you approximately 5 minutes to complete.

LEVEL 5: BEST PRACTICE
☐ 3.1 The most senior D&I professional is an equal and influential partner on the senior leadership team.
☐ 3.2 Leaders at all levels lead the organization’s D&I initiatives and are regarded as D&I champions.
☐ 3.3 Diversity networks serve as partners and advise on recruitment, communications, risk management, product and service development, community engagement, and other organizational issues.
☐ 3.4 D&I is well integrated into core organizational systems and practices.

LEVEL 4: PROGRESSIVE
☐ 3.5 The organization provides adequate resources, staffing, and support to help ensure implementation of its D&I strategy.
☐ 3.6 The D&I function is headed by an influential leader who is knowledgeable about D&I.
☐ 3.7 D&I councils/committees are composed of line and staff leaders representing the diversity of the organization.
☐ 3.8 Diversity networks are recognized as credible, valued resources to the organization.
☐ 3.9 Departments or divisions have D&I councils/committees in alignment with the organization’s strategy.

LEVEL 3: PROACTIVE
☐ 3.10 There is a D&I champion/leader and staff with responsibility for D&I.
☐ 3.11 A few diversity networks with budget and resources exist.
☐ 3.12 An organization-wide D&I council/committee is given visible support by leaders, represents internal stakeholders, and impacts D&I efforts.
☐ 3.13 Some budget has been allocated to cover D&I implementation.
☐ 3.14 The D&I staff are hired 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.

See Page 2 of Category 3 Checklist. →

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GDIB Assessment Checklist for Category 3: D&I Structure and Implementation
☐ 3.15 If the organization has labor unions or similar groups, they are engaged in D&I efforts.
☐ 3.16 D&I staff are called upon for advice, counsel, and content expertise.

**LEVEL 2: REACTIVE**
☐ 3.17 D&I is simply an additional duty of the human resources, legal, or other department.
☐ 3.18 Diversity networks and D&I committees may exist, but they have no real power, influence, or resources.

**LEVEL 1: INACTIVE**
☐ 3.19 There is no organizational structure or budget for D&I.
☐ 3.20 No one in the organization has formal responsibility for addressing D&I issues.

**SCORING**
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1.5  2.5  3.5  4.5

Your Assessment Leader may have given you additional instructions. If so, follow those instructions.

Complete, if requested by your Assessment Leader:

Name_________________________________________________________
Group Identifier/Code_____________________________________________
Date __________________________________________________________

Thank you for your participation. Please contact your Assessment Leader if you have questions.
GDIB Assessment Checklist

CATEGORY 4: RECRUITMENT, RETENTION, DEVELOPMENT, AND ADVANCEMENT

Instructions for completing this Checklist:

Incorporating the information provided by your Assessment Leader,
1. Please fill in the square (☐) for ALL items you agree are mostly true in your organization. No organization is perfect. Therefore, fill in the square if you agree that the item is generally true.
2. If you are confused or are uncertain, place a question mark (?) in the square.
3. If you believe the item is untrue or mostly untrue, do not fill in the square; leave it open.

We estimate this Checklist will take you approximately 5 minutes to complete.

LEVEL 5: BEST PRACTICE
☐ 4.1 The organization’s talent development processes have resulted in equitable and accessible recruitment, retention, and advancement and a pervasive feeling of inclusion.
☐ 4.2 The workforce across all levels and functions is generally representative of the organization’s labor markets.
☐ 4.3 The organization’s reputation for quality D&I efforts enhances its ability to attract and retain employees who contribute to outstanding organizational results.
☐ 4.4 Turnover of members of underrepresented groups is in parity with that of the majority group.

LEVEL 4: PROGRESSIVE
☐ 4.5 Recruitment includes advertising on diversity-focused career websites, using social media, and networking with internal and external diversity groups.
☐ 4.6 Recruitment and selection panels understand how bias enters into recruiting and therefore include members knowledgeable about the diverse population the organization wants to attract and advance.
☐ 4.7 Special efforts are made to place members of underrepresented groups in positions that serve as succession pools for future promotion.
☐ 4.8 Employees are encouraged to consider development opportunities and positions outside their current functional, technical, or professional area.
☐ 4.9 Development through self-assessment, coaching, mentoring, and participating in projects where accomplishments can become known is open and encouraged.
☐ 4.10 Employees are exposed to a variety of cultures, markets, values, and practices as part of development and retention.
☐ 4.11 High potential talent is provided with internal coaches, mentors, and external coaching opportunities to maximize performance and develop advanced careers.

See Page 2 of Category 4 Checklist. ➔
LEVEL 3: PROACTIVE
☐ 4.12 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.
☐ 4.13 Managers are educated in understanding differences and the impact their biases may have on selection, development, and advancement decisions.
☐ 4.14 External search firms are selected based in part on their expertise in diversity recruiting.
☐ 4.15 The organization offers a variety of development programs and encourages employees to take advantage of them.
☐ 4.16 The organization attempts to remove biases based on personality type; for example, showing or restraining emotions won’t be seen as a barrier.

LEVEL 2: REACTIVE
☐ 4.17 The hiring focus is based primarily on representation to meet diversity or equity goals or targets.
☐ 4.18 Recruitment practices do not include diverse candidates as a matter of procedure for all positions.
☐ 4.19 Development and advancement systems do not focus on including diverse candidates.
☐ 4.20 Recruitment and development systems do not take into account how people from different cultures and backgrounds may respond to interview questions.

LEVEL 1: INACTIVE
☐ 4.21 There is no effort to recruit, select, advance, or retain employees from diverse underrepresented groups at any level.
☐ 4.22 Other than a short statement that the organization has an equal opportunity or similar policy, there is no mention of D&I in the organization’s public messaging.

SCORING
Based on your responses above, please make a judgement as to which level you believe your organization generally operates. There is no mathematical calculation to use to determine this. Generally, the level to state is where you have filled in most of the squares. If that is Level 3, then chose that one. If it is half Level 4 and half Level 5, then indicate 4.5 in the choices below.

Your Assessment Leader may have given you additional instructions. If so, follow those instructions.

Complete, if requested by your Assessment Leader:
Name_________________________________________________________
Group Identifier/Code____________________________________________
Date __________________________________________________________

Thank you for your participation. Please contact your Assessment Leader if you have questions.
GDIB Assessment Checklist

CATEGORY 5: BENEFITS, WORK-LIFE, AND FLEXIBILITY

Instructions for completing this Checklist:

Incorporating the information provided by your Assessment Leader,

1. Please fill in the square (☐) for ALL items you agree are mostly true in your organization. No organization is perfect. Therefore, fill in the square if you agree that the item is generally true.
2. If you are confused or are uncertain, place a question mark (?) in the square.
3. If you believe the item is untrue or mostly untrue, do not fill in the square; leave it open.

We estimate this Checklist will take you approximately 5 minutes to complete.

LEVEL 5: BEST PRACTICE
☐ 5.1 Most leaders model work-life integration.
☐ 5.2 Part-time, job sharing, and other flexible work arrangements are available for all appropriate positions. Their use, which leaders encourage, does not negatively impact employee performance or advancement.
☐ 5.3 The organization accepts and recognizes diversity in language and accents, dress, religion, physical appearance, and non-traditional schedules as fully legitimate.
☐ 5.4 A comprehensive range of flexible benefits and services, including education, health, and counseling, is provided.
☐ 5.5 Based on research and assessment, benefits and services are regularly adapted to changing conditions, technology, and innovative ideas.

LEVEL 4: PROGRESSIVE
☐ 5.6 Paid leave beyond what is legally required is provided and used. This may include care giving for spouses, domestic partners, children, and adult dependents.
☐ 5.7 Work-at-home, job-sharing, and part-time work is provided for select positions.
☐ 5.8 The organizational culture is accepting of those who work flexible schedules.
☐ 5.9 Health and wellness benefits include education, clinics, fitness centers, employee assistance programs, and preventive healthcare, including mental health issues.
☐ 5.10 Family-friendly services include subsidized childcare and eldercare (on-site or outsourced), lactation rooms, and emergency care.
☐ 5.11 Accessibility and accommodation for religious practices, persons with disabilities, and other special needs are accepted and do not negatively impact the perception of performance.
☐ 5.12 Policies and practices guard against favoritism and are applied equitably across the organization in a culturally sensitive way.
☐ 5.13 An inclusive concept of family guides determination of benefits and participation in organizational events.

See Page 2 of Category 5 Checklist. →
LEVEL 3: PROACTIVE
☐ 5.14 Paid leave is provided for healthcare, civic responsibilities, bereavement, and so forth.
☐ 5.15 Religious practices and cultural holidays are mostly accommodated even if they are not the holidays of the majority.
☐ 5.16 Flexibility in personal appearance and one’s workspace is allowed for most employees, provided it is done in a culturally sensitive way.
☐ 5.17 Technology support for mobility, disabilities, and flexible work arrangements are available for select employees.

LEVEL 2: REACTIVE
☐ 5.18 Benefit programs generally are “one-size-fits-all” and their value or relevance to employees is not monitored.
☐ 5.19 Work schedules are generally traditional, inflexible, and compliance-driven.
☐ 5.20 Flexibility may be misunderstood, applied unfairly, or perceived as favoritism.
☐ 5.21 Language and physical access are accommodated only when legally required.

LEVEL 1: INACTIVE
☐ 5.22 Only legally required employee benefits and services are provided.
☐ 5.23 There is little or no provision for childcare and family needs, schedule flexibility, or work leave.

SCORING
Based on your responses above, please make a judgement as to which level you believe your organization generally operates. There is no mathematical calculation to use to determine this. Generally, the level to state is where you have filled in most of the squares. If that is Level 3, then chose that one. If it is half Level 4 and half Level 5, then indicate 4.5 in the choices below.

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Your Assessment Leader may have given you additional instructions. If so, follow those instructions.

Complete, if requested by your Assessment Leader:

Name_________________________________________________________
Group Identifier/Code_____________________________________________
Date __________________________________________________________

Thank you for your participation. Please contact your Assessment Leader if you have questions.
GDIB Assessment Checklist

CATEGORY 6: JOB DESIGN, CLASSIFICATION, AND COMPENSATION

Instructions for completing this Checklist:

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2. If you are confused or are uncertain, place a question mark (?) in the square.
3. If you believe the item is untrue or mostly untrue, do not fill in the square; leave it open.

We estimate this Checklist will take you approximately 5 minutes to complete.

LEVEL 5: BEST PRACTICE
☐ 6.1 The organization maintains equitable internal and external compensation and job classification practices.
☐ 6.2 Innovative job design results in employees being paid for performance rather than “putting in time,” and enables flexible work options.
☐ 6.3 Inequitable previous compensation systems have been addressed and individuals compensated.
☐ 6.4 Classification and compensation systems have been modified to address conscious and unconscious biases and assumptions.

LEVEL 4: PROGRESSIVE
☐ 6.5 The organization adds additional compensation for parental leave beyond what the law requires.
☐ 6.6 Job requirements and descriptions are clear and not confused by non-job-related factors such as gender, school graduated from, religion, age, sexual orientation, disability, appearance preferences, or culturally specific behaviors.
☐ 6.7 There is increased acceptance of flexibility and variety in job design to accommodate employee needs for part-time work, working non-standard hours, working remotely, and taking leave for personal or other reasons.
☐ 6.8 The organization ensures that annual compensation gap analyses are conducted to confirm that biases based on age, disability, gender, organizational function, race, and other potential equity issues are dealt with appropriately.

LEVEL 3: PROACTIVE
☐ 6.9 Jobs are designed to align individual needs with organizational needs as much as possible.

See Page 2 of Category 6 Checklist. 

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☐ 6.10 The organization systematically reviews its job requirements, classifications, and compensation practices for bias and takes action to mitigate adverse impact.

☐ 6.11 Classification/grading and compensation/ remuneration systems are widely communicated to and understood by employees.

☐ 6.12 An analysis and design of jobs has resulted in some flexibility for groups requiring it.

LEVEL 2: REACTIVE

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

☐ 6.14 There is a policy on pay equity, but the organization does not conduct an analysis to ascertain if the policy is followed.

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

LEVEL 1: INACTIVE

☐ 6.16 The organization lacks systematic methods for classifying jobs or determining employee compensation.

☐ 6.17 Based on stereotypes involving language, gender, age, culture, or disability, some jobs are thought to be “a better fit” for certain groups.

SCORING

Based on your responses above, please make a judgement as to which level you believe your organization generally operates. There is no mathematical calculation to use to determine this. Generally, the level to state is where you have filled in most of the squares. If that is Level 3, then chose that one. If it is half Level 4 and half Level 5, then indicate 4.5 in the choices below.

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Your Assessment Leader may have given you additional instructions. If so, follow those instructions.

Complete, if requested by your Assessment Leader:

Name_________________________________________________________

Group Identifier/Code_____________________________________________

Date __________________________________________________________

Thank you for your participation. Please contact your Assessment Leader if you have questions.
GDIB Assessment Checklist

CATEGORY 7: D&I LEARNING AND EDUCATION

Instructions for completing this Checklist:

Incorporating the information provided by your Assessment Leader,
1. Please fill in the square (☐) for ALL items you agree are mostly true in your organization. No organization is perfect. Therefore, fill in the square if you agree that the item is generally true.
2. If you are confused or are uncertain, place a question mark (?) in the square.
3. If you believe the item is untrue or mostly untrue, do not fill in the square; leave it open.

We estimate this Checklist will take you approximately 5 minutes to complete.

LEVEL 5: BEST PRACTICE
☐ 7.1 D&I is integrated into all learning and advances the organization’s strategy.
☐ 7.2 A variety of innovative D&I tools, including both extensive self-directed and instructor-led learning resources, are accessible to all regardless of location.
☐ 7.3 Learning from D&I best practices leads the way in creating new organizational culture, structures, services, and products that impact performance and sustainability.
☐ 7.4 Challenging and sometimes controversial issues such as racism, sexism, ageism, classism, heterosexism, religious bias, stereotype threat, and unconscious bias are effectively addressed with sensitivity, fairness, conviction, and compassion.

LEVEL 4: PROGRESSIVE
☐ 7.5 D&I 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.
☐ 7.6 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 D&I learning needs.
☐ 7.7 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.
☐ 7.8 Employees and, if needed, their families receive cultural competency training and other support when relocating internationally, visiting different locales, returning from international assignments, or when working with international teams.
☐ 7.9 D&I learning and education is an on-going, multi-year, developmental curriculum that takes individuals through graduated stages of learning.

LEVEL 3: PROACTIVE
☐ 7.10 D&I is integrated into the organization’s overall learning and education programs, including employee orientation, customer service, and management programs.

See Page 2 of Category 7 Checklist.
☐ 7.11 D&I learning opportunities are developed in multiple languages if needed, and offered in a variety of accessible formats.
☐ 7.12 Programs address sometimes-sensitive issues of privilege, stereotypes, bias, and “isms” and include development of skills to address those issues.
☐ 7.13 D&I experts or learning professionals build D&I into every stage of the learning design and/or conduct the D&I learning programs.
☐ 7.14 The organization encourages cultural celebrations and organization-wide activities that combine social interaction with D&I learning.
☐ 7.15 In addition to general D&I education, employees also receive training to implement the D&I strategy. It includes content specific to their level and areas of responsibility.

LEVEL 2: REACTIVE
☐ 7.16 D&I learning is brief and focused only on educating employees about policies, meeting legal requirements, or assisting with language use.
☐ 7.17 Persons designing and delivering learning do not have specific expertise in D&I.
☐ 7.18 D&I programs are primarily “off-the-shelf” and not tailored for local needs and issues.

LEVEL 1: INACTIVE
☐ 7.19 There are no formal D&I learning or education activities.
☐ 7.20 There is little D&I awareness, knowledge, or understanding.

SCORING
Based on your responses above, please make a judgement as to which level you believe your organization generally operates. There is no mathematical calculation to use to determine this. Generally, the level to state is where you have filled in most of the squares. If that is Level 3, then chose that one. If it is half Level 4 and half Level 5, then indicate 4.5 in the choices below.

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Your Assessment Leader may have given you additional instructions. If so, follow those instructions.

Complete, if requested by your Assessment Leader:
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Group Identifier/Code_____________________________________________
Date __________________________________________________________

Thank you for your participation. Please contact your Assessment Leader if you have questions.
GDIB Assessment Checklist

CATEGORY 8: ASSESSMENT, MEASUREMENT AND RESEARCH

Instructions for completing this Checklist:

Incorporating the information provided by your Assessment Leader,

1. Please fill in the square (☐) for ALL items you agree are mostly true in your organization. No organization is perfect. Therefore, fill in the square if you agree that the item is generally true.
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We estimate this Checklist will take you approximately 5 minutes to complete.

LEVEL 5: BEST PRACTICE

☐ 8.1 In-depth D&I assessments covering behavior, attitude, and perception are regularly conducted for the overall organization and within organizational units and feed into strategy and implementation.
☐ 8.2 D&I measurements are included as part of the organization’s overall performance, linked to the organizational strategy, and tied to compensation, and publically shared.
☐ 8.3 The organization has demonstrated significant annual improvements in meeting D&I goals consistently over several years.
☐ 8.4 The organization is known for its investment in D&I research and in sharing the findings publicly.

LEVEL 4: PROGRESSIVE

☐ 8.5 Integrated, multiple approaches to monitoring and evaluating D&I goals are conducted to track their impact and effectiveness and make improvements when necessary.
☐ 8.6 Organizational culture is monitored through cultural audits and employee opinion surveys using varied diversity dimensions.
☐ 8.7 The organization invests in research to study D&I for both internal and external purposes.
☐ 8.8 All employees are measured on their performance based on D&I goals set by the organization.
☐ 8.9 The organization can clearly demonstrate organizational improvements from meeting D&I goals.

LEVEL 3: PROACTIVE

☐ 8.10 Assessment tools and quantitative monitoring techniques are used to measure progress on recruitment, retention, compensation, and other D&I elements.
☐ 8.11 Information from tools such as 360-degree feedback, focus groups, interviews, and opinion/engagement surveys from employees, former employees, and customers helps to shape future D&I initiatives.

See Page 2 of Category 8 Checklist. ➔
☐ 8.12 Leaders are individually measured on the execution and accomplishment of D&I goals specific to their areas of responsibility.

☐ 8.13 Internal and external best practices are studied and benchmarking or other credible metrics, both qualitative and quantitative, are used to improve the organization’s D&I efforts.

**LEVEL 2: REACTIVE**

☐ 8.14 Some feedback on D&I is solicited in employee and customer surveys, market research, internal reviews, or climate studies, but there is no follow-up, no rewards, and no consequences for poor performance.

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

☐ 8.16 Measurements are primarily based on past negative indicators, such as turnover, lawsuits, and complaints.

**LEVEL 1: INACTIVE**

☐ 8.17 There are no assessments to gather information about diverse employee or customer needs and concerns, or about organizational culture or employee engagement.

☐ 8.18 There is no attempt or effort to evaluate or monitor diversity-related issues or D&I progress.

**SCORING**

Based on your responses above, please make a judgement as to which level you believe your organization generally operates. There is no mathematical calculation to use to determine this. Generally, the level to state is where you have filled in most of the squares. If that is Level 3, then chose that one. If it is half Level 4 and half Level 5, then indicate 4.5 in the choices below.

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Complete, if requested by your Assessment Leader:

Name_________________________________________________________

Group Identifier/Code___________________________________________

Date __________________________________________________________

Thank you for your participation. Please contact your Assessment Leader if you have questions.
GDIB Assessment Checklist

CATEGORY 9: D&I COMMUNICATIONS

Instructions for completing this Checklist:

Incorporating the information provided by your Assessment Leader,

1. Please fill in the square (☐) for ALL items you agree are mostly true in your organization. No organization is perfect. Therefore, fill in the square if you agree that the item is generally true.
2. If you are confused or are uncertain, place a question mark (?) in the square.
3. If you believe the item is untrue or mostly untrue, do not fill in the square; leave it open.

We estimate this Checklist will take you approximately 5 minutes to complete.

LEVEL 5: BEST PRACTICE
☐ 9.1 The organization has branded its D&I initiative internally and externally enhancing the organization’s reputation.
☐ 9.2 D&I topics are easily and quickly located on the organization’s internal and external websites. Information is thorough, fully accessible, and regularly updated.
☐ 9.3 D&I communication is frequent, ongoing, innovative, and contributes to an enhanced reputation for the organization.

LEVEL 4: PROGRESSIVE
☐ 9.4 Communications professionals and speechwriters are educated about D&I and include D&I messages in general organizational communications.
☐ 9.5 The organization’s communication functions – community affairs, employee communications, public relations, and marketing communications – consistently promote D&I.
☐ 9.6 Although employees are expected to access information on D&I on the organization’s website, information is also sent frequently and systematically to employees.
☐ 9.7 Leaders share D&I information with stakeholders, including survey results, and successes and failures.
☐ 9.8 All internal and external communication is fully accessible and available in multiple formats and languages if needed by stakeholders.

LEVEL 3: PROACTIVE
☐ 9.9 The organization encourages employees to discuss D&I and provide input to the organization.
☐ 9.10 Through a variety of methods—a website, newsletter, email, social media, and events—employees learn about the D&I vision, strategy, and goals.
☐ 9.11 The organization integrates D&I into many aspects of communication by aligning D&I with organizational goals and issues.

See Page 2 of Category 9 Checklist.
☐ 9.12 Translations and other accessible formats are provided when needed. Communication is location-sensitive across countries and languages.

☐ 9.13 Communication reflects awareness and knowledge of diversity, including recognition of cultural influences, to enhance inclusion.

☐ 9.14 The organization’s external website features information about its D&I vision, strategy, goals, and results.

LEVEL 2: REACTIVE

☐ 9.15 D&I communication is done solely to remind or educate employees about adhering to policy and compliance requirements.

☐ 9.16 Measurements are primarily based on past negative indicators, such as turnover, lawsuits, and complaints.

LEVEL 1: INACTIVE

☐ 9.17 There is no explicit communication about D&I.

☐ 9.18 Discussions on D&I are perceived to be risky and are avoided.

☐ 9.19 Organizational communication is not analyzed or adjusted for appropriateness regarding D&I.

SCORING

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Your Assessment Leader may have given you additional instructions. If so, follow those instructions.

Complete, if requested by your Assessment Leader:

Name_________________________________________________________

Group Identifier/Code_____________________________________________

Date __________________________________________________________

Thank you for your participation. Please contact your Assessment Leader if you have questions.
GDIB Assessment Checklist

CATEGORY 10: CONNECTING D&I AND SUSTAINABILITY

Instructions for completing this Checklist:

Incorporating the information provided by your Assessment Leader,
1. Please fill in the square (☐) for ALL items you agree are mostly true in your organization. No organization is perfect. Therefore, fill in the square if you agree that the item is generally true.
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3. If you believe the item is untrue or mostly untrue, do not fill in the square; leave it open.

We estimate this Checklist will take you approximately 5 minutes to complete.

LEVEL 5: BEST PRACTICE

☐ 10.1 D&I is integral to the overall and long-term success and sustainability of the organization and all its stakeholders. Sustainability is fully integrated into the D&I strategy and vice versa.
☐ 10.2 The organization takes a leadership role in influencing and supporting the connection of D&I and sustainability initiatives locally and globally.
☐ 10.3 D&I communication is frequent, ongoing, innovative, and contributes to an enhanced reputation for the organization.
☐ 10.4 The organization has evidence that its sustainability and D&I initiatives benefit from their alignment with each other and show more meaningful impact than if they were separate and unconnected initiatives.
☐ 10.5 D&I results reflect actions in at least three of the following aspects of sustainability as defined by the United Nations−People, Planet, Prosperity, Peace, or Partnership.

LEVEL 4: PROGRESSIVE

☐ 10.6 D&I leaders participate actively in the organization’s sustainability initiative. Likewise, sustainability leaders participate actively in the D&I initiative.
☐ 10.7 The organization adapts its sustainability strategy, policies, and practices with input, consultation, and collaboration of diverse stakeholder groups.
☐ 10.8 D&I results reflect actions in at least two of the following aspects of sustainability−People, Planet, Prosperity, Peace, or Partnership.
☐ 10.9 The organization reports to all stakeholders on its progress regarding D&I aspects of sustainability.

LEVEL 3: PROACTIVE

☐ 10.10 The organization has a sustainability strategy, which recognizes the linkage between D&I and sustainability.

See Page 2 of Category 10 Checklist. →
☐ 10.11 The organization is involved publicly, supports financially, and advocates for one or more D&I and sustainability initiatives, whether global, regional, or issue-specific.

☐ 10.12 The organization makes a concerted effort to integrate diverse voices and perspectives early and often in all sustainability efforts.

☐ 10.13 D&I results reflect actions in at least one of the following aspects of sustainability: People, Planet, Prosperity, Peace, or Partnership.

LEVEL 2: REACTIVE

☐ 10.14 There is some effort to connect D&I with organizational goals relating to sustainability, such as community development partnerships, volunteerism, or peace-building activities.

☐ 10.15 There is some involvement in incorporating D&I in organizational and societal goals, such as including a diverse array of external stakeholders in assessing how the organization’s practices affect its wider community.

LEVEL 1: INACTIVE

☐ 10.16 There is no organizational connection between D&I and sustainability.

SCORING

Based on your responses above, please make a judgement as to which level you believe your organization generally operates. There is no mathematical calculation to use to determine this. Generally, the level to state is where you have filled in most of the squares. If that is Level 3, then chose that one. If it is half Level 4 and half Level 5, then indicate 4.5 in the choices below.

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Your Assessment Leader may have given you additional instructions. If so, follow those instructions.

Complete, if requested by your Assessment Leader:

Name_________________________________________________________

Group Identifier/Code_____________________________________________________________________

Date ________________________________________________________________

Thank you for your participation. Please contact your Assessment Leader if you have questions.
GDIB Assessment Checklist

CATEGORY 11: COMMUNITY, GOVERNMENT RELATIONS, AND SOCIAL RESPONSIBILITY

Instructions for completing this Checklist:

Incorporating the information provided by your Assessment Leader,

1. Please fill in the square (☐) for ALL items you agree are mostly true in your organization. No organization is perfect. Therefore, fill in the square if you agree that the item is generally true.
2. If you are confused or are uncertain, place a question mark (?) in the square.
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We estimate this Checklist will take you approximately 5 minutes to complete.

LEVEL 5: BEST PRACTICE

☐ 11.1 Employee time and labor are provided for a wide variety of community projects; employees may receive additional compensation or rewards recognizing their community involvement.
☐ 11.2 Organizational facilities serve and promote economic growth of the whole community, particularly communities that have been historically denied access to resources, or are presently in the greatest need.
☐ 11.3 The organization leads in supporting and advocating for diversity-related interests in government and societal affairs.
☐ 11.4 The organization is generous in supporting and assisting other organizations in their D&I initiatives and in promoting the advancement of D&I and social responsibility in the community.
☐ 11.5 The organization’s D&I initiatives in the community are treated as more than philanthropy. They are perceived as a core function mainstreamed into organizational strategy.

LEVEL 4: PROGRESSIVE

☐ 11.6 The organization expresses support for the principles enshrined in the UN’s Universal Declaration of Human Rights and the Global Compact and reflects this in both intent and in action.
☐ 11.7 Community involvement reflects long-range planning and supports most segments of the population.
☐ 11.8 The organization supports scholarship and internship programs for underrepresented populations that have a positive impact on both the community and the organization’s future labor force.
☐ 11.9 Employees are encouraged to volunteer in their community. In some cases, the organization “loans” them to work for nonprofit organizations.

See Page 2 of Category 11 Checklist.
☐ 11.10 The organization connects D&I goals with ethics and integrity initiatives, and supports social justice, social cohesion, and economic development.

**LEVEL 3: PROACTIVE**

☐ 11.11 The organization partners with other organizations that work to advance the rights of vulnerable groups in the community.

☐ 11.12 The organization publicizes its social responsibility policy.

☐ 11.13 Long-range community development plans are formulated with diverse groups, including local governments and community leaders.

☐ 11.14 Community heroes from underrepresented groups and/or champions for D&I issues are celebrated by the organization.

**LEVEL 2: REACTIVE**

☐ 11.15 There is some minor involvement in or support for societal D&I issues but only if considered non-controversial.

☐ 11.16 There is some minor involvement with the community, schools, and/or local government projects, primarily for public relations purposes.

**LEVEL 1: INACTIVE**

☐ 11.17 There is no involvement or support provided to community or government initiatives related to D&I.

☐ 11.18 The organization is not willing to take a stand or adopt a firm position about D&I.

**SCORING**

Based on your responses above, please make a judgement as to which level you believe your organization generally operates. There is no mathematical calculation to use to determine this. Generally, the level to state is where you have filled in most of the squares. If that is Level 3, then chose that one. If it is half Level 4 and half Level 5, then indicate 4.5 in the choices below.

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Your Assessment Leader may have given you additional instructions. If so, follow those instructions.

Complete, if requested by your Assessment Leader:

Name_________________________________________________________

Group Identifier/Code_____________________________________________

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Thank you for your participation. Please contact your Assessment Leader if you have questions.

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*GDIB Assessment Checklist for Category 11: Community, Government Relations, and Social Responsibility*
GDIB Assessment Checklist

CATEGORY 12: PRODUCTS AND SERVICES DEVELOPMENT

Instructions for completing this Checklist:

Incorporating the information provided by your Assessment Leader,
1. Please fill in the square (☐) for ALL items you agree are mostly true in your organization. No organization is perfect. Therefore, fill in the square if you agree that the item is generally true.
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3. If you believe the item is untrue or mostly untrue, do not fill in the square; leave it open.

We estimate this Checklist will take you approximately 5 minutes to complete.

LEVEL 5: BEST PRACTICE
☐ 12.1 The product, service, and policy development cycle recognizes diversity and accessibility from the outset. It doesn’t merely adapt products first developed for the dominant group or culture.
☐ 12.2 Almost all teams involved in the ongoing development of products and services are diverse and likely include customers, stakeholders, and community representatives.
☐ 12.3 The organization shows the link between diversity and innovation, consistently leveraging D&I to increase product and service innovation.
☐ 12.4 Culturally-sensitive services, such as engaging a traditional healer in a hospital or serving foods only enjoyed by one culture, are provided even though that practice may not be accepted or enjoyed by others.

LEVEL 4: PROGRESSIVE
☐ 12.5 Changes in demographics, values, and consumer behaviors are researched, anticipated, and served.
☐ 12.6 Product, service, and policy adaptations for people from various groups are made. These include, for example, sharia-compliant financial products, products for left-handed users, and adaptations for persons with disabilities.
☐ 12.7 The organization is sensitive to the religious views, values, and cultural norms of various countries and communities and develops products, services, and policies that are considered appropriate for those customers or stakeholders.
☐ 12.8 The organization successfully leverages diverse teams, believing it will improve the quality and innovation of products, services, and policies.

LEVEL 3: PROACTIVE
☐ 12.9 Products, services, and policies are analyzed for their value to current and potential customers and are tailored appropriately.

See Page 2 of Category 12 Checklist. →
☐ 12.10 The organization publicizes its social responsibility policy.
☐ 12.11 Diverse and culturally competent product-development and service analysis teams are encouraged to develop innovative ideas that enhance products and services.
☐ 12.12 Research and product testing help analyze how different customer/stakeholder groups and cultures may use the organization’s products and services.
☐ 12.13 Accessibility for persons with disabilities is often considered in the development and delivery of products, services, and policies.

**LEVEL 2: REACTIVE**
☐ 12.14 There is limited interest in developing or altering products and services based on customer preferences or demographics.
☐ 12.15 There is no adaptation of products, services or policies for accessibility for persons with disabilities, unless required by law.

**LEVEL 1: INACTIVE**
☐ 12.16 No effort is made to adapt products, services or policies for diverse customers or stakeholders.
☐ 12.17 Development teams and focus groups do not include a diverse population of employees, potential customers, or other stakeholders.

**SCORING**
Based on your responses above, please make a judgement as to which level you believe your organization generally operates. There is no mathematical calculation to use to determine this. Generally, the level to state is where you have filled in most of the squares. If that is Level 3, then chose that one. If it is half Level 4 and half Level 5, then indicate 4.5 in the choices below.

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Complete, if requested by your Assessment Leader:
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Group Identifier/Code ______________________________________
Date ____________________________________________

Thank you for your participation. Please contact your Assessment Leader if you have questions.
GDIB Assessment Checklist

CATEGORY 13: MARKETING AND CUSTOMER SERVICE

Instructions for completing this Checklist:

Incorporating the information provided by your Assessment Leader,

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We estimate this Checklist will take you approximately 5 minutes to complete.

LEVEL 5: BEST PRACTICE

☐ 13.1 The organization uses sophisticated analysis techniques on an ongoing basis to understand and respond to its diverse customer base.

☐ 13.2 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.

☐ 13.3 If the organization uses a systemic marketing and customer service approach it ensures that it can be customized or adapted within and across countries, regions, cultures, languages, and other diversity dimensions.

LEVEL 4: PROGRESSIVE

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

☐ 13.5 While outside D&I expertise may also be sought, the organization leverages the marketing, distribution, and customer service expertise of its diverse staff.

☐ 13.6 Marketing, advertising, public relations, and all customer contact methods do not perpetuate stereotypes, but rather promote positive role models and challenge assumptions.

☐ 13.7 The marketing and sales force has intercultural competence and can adapt and work effectively with customers of many backgrounds.

☐ 13.8 All marketing and customer service processes are fully accessible, and accessibility is built into the process of design and development of marketing materials and customer service.

☐ 13.9 Agencies and consultants with expertise in diversity and inclusion provide advice when needed.

See Page 2 of Category 13 Checklist. ➔
LEVEL 3: PROACTIVE
☐ 13.10 Some attempt is made to reach a diverse range of customers by using market-specific media.
☐ 13.11 Test groups are diverse and encouraged to evaluate marketing and service strategies and techniques for various groups and cultures.
☐ 13.12 Marketing, advertising, and public relations groups in the organization reflect diversity and are positioned to reach diverse markets.
☐ 13.13 Accessibility for persons with disabilities is routinely a consideration in marketing and customer service.
☐ 13.14 When needed, customer service is provided in languages other than those required by law.

LEVEL 2: REACTIVE
☐ 13.15 The organization only recognizes broad differences among its customers, such as young and old, without exploring generational differences.
☐ 13.16 Even if products and services are marketed somewhat differently to different groups, the advertising is not adapted to be culturally sensitive.
☐ 13.17 Customer service and marketing are accessible for persons with disabilities only where required by law.

LEVEL 1: INACTIVE
☐ 13.18 Advertising and publicity may perpetuate stereotypes and traditional roles and nothing is done to counter them.
☐ 13.19 Customer service, distribution, and communications consistently ignore differences in customer needs.

SCORING
Based on your responses above, please make a judgement as to which level you believe your organization generally operates. There is no mathematical calculation to use to determine this. Generally, the level to state is where you have filled in most of the squares. If that is Level 3, then chose that one. If it is half Level 4 and half Level 5, then indicate 4.5 in the choices below.

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Complete, if requested by your Assessment Leader:

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Date __________________________________________________________

Thank you for your participation. Please contact your Assessment Leader if you have questions.
GDIB Assessment Checklist

CATEGORY 14: SUPPLIER DIVERSITY

Instructions for completing this Checklist:

Incorporating the information provided by your Assessment Leader,

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3. If you believe the item is untrue or mostly untrue, do not fill in the square; leave it open.

We estimate this Checklist will take you approximately 5 minutes to complete.

LEVEL 5: BEST PRACTICE

☐ 14.1 The organization’s suppliers are required to have a significant percentage of their business with diverse suppliers and to provide evidence that they are committed to achieving their own D&I goals.
☐ 14.2 The organization’s suppliers reflect the community’s composition across a broad array of diversity dimensions.
☐ 14.3 The organization collaborates with its underrepresented suppliers to improve all aspects of supply management.
☐ 14.4 The supplier diversity function is fully aligned with the broad goals of D&I for the organization.
☐ 14.5 The organization procures both essential and non-essential goods and services from underrepresented suppliers.

LEVEL 4: PROGRESSIVE

☐ 14.6 The organization is proactive in seeking and attracting underrepresented suppliers and in informing new and established suppliers of additional opportunities with the organization.
☐ 14.7 The organization is proactive in seeking and attracting underrepresented suppliers and in informing new and established suppliers of additional opportunities with the organization.
☐ 14.8 Persons involved in the supplier selection process are knowledgeable about D&I and aware of the potential impact of unconscious bias.
☐ 14.9 Educational assistance and coaching is provided to underrepresented suppliers and potential suppliers to help them be competitive.
☐ 14.10 The organization publishes information about annual expenditures with diverse suppliers.
☐ 14.11 D&I criteria is included in the procurement process and given reference or weight in the decision making process.

LEVEL 3: PROACTIVE

☐ 14.12 A supplier database includes information about the ownership of organizations that supply goods or services and the diversity of its employees.
☐ 14.13 The organization has a supplier diversity strategy with dedicated resources for implementation.

See Page 2 of Category 14 Checklist. →

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GDIB Assessment Checklist for Category 14: Supplier Diversity
☐ 14.14 Input from underrepresented suppliers is included in the organization’s supplier diversity program.
☐ 14.15 D&I education specific to supplier relations is provided to all staff who interact with suppliers.
☐ 14.16 The organization regularly participates in trade fairs and advertising and seeks opportunities to inform underrepresented suppliers that the organization welcomes their business.
☐ 14.17 Engaging in D&I is a proposal criteria, but it is not weighted heavily or given preference.

LEVEL 2: REACTIVE
☐ 14.18 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.
☐ 14.19 The organization uses underrepresented suppliers, but only for small, one-time, or low-fee contracts.
☐ 14.20 There is no or very little collaboration between the procurement function, where relationships with suppliers are usually managed, and the D&I function.

LEVEL 1: INACTIVE
☐ 14.21 No consideration is given to diversity when determining suppliers and no supplier diversity program exists.
☐ 14.22 There is no recognition of the value that diverse suppliers bring to the organization.

SCORING
Based on your responses above, please make a judgement as to which level you believe your organization generally operates. There is no mathematical calculation to use to determine this. Generally, the level to state is where you have filled in most of the squares. If that is Level 3, then chose that one. If it is half Level 4 and half Level 5, then indicate 4.5 in the choices below.

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<td>3.5</td>
<td>4.5</td>
<td></td>
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</tbody>
</table>

Your Assessment Leader may have given you additional instructions. If so, follow those instructions.

Complete, if requested by your Assessment Leader:

Name_________________________________________________________
Group Identifier/Code_____________________________________________
Date __________________________________________________________

Thank you for your participation. Please contact your Assessment Leader if you have questions.

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