

# EQUITY, DIVERSITY & INCLUSION ORGANIZATIONAL SELF-ASSESSMENT



*DeEtta Jones*

NEXT GENERATION  
LEADERSHIP

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Dear Colleague,

If you're reading this, you've likely been a champion for Equity, Diversity, and Inclusion in your workplace for many years. In that time, you've probably tried a multitude of things. You've hosted workshops, encouraged managers to recruit candidates with diverse lived experiences, written diversity statements, and touted your organization's commitment to diversity. Despite your efforts, your organization never quite seems to make meaningful progress toward achieving its EDI goals.

While your frustration is understandable, don't despair! Equity, Diversity and Inclusion are tough subjects. They cover a lot of territory, change over time, and are viewed differently by different people. Also, when done properly, the EDI process often creates more questions than it answers, such as: What is the definition of success? How do we measure achievement long-term? What are the appropriate short-term milestones? How do we motivate people who don't see EDI as a core part of their work? The ever-changing nature of EDI work means that the process is rarely, if ever, simple.

To add to the complexity, it's difficult to know "how" to do EDI well. For years, many organizations have approached EDI using a deficit-based approach: they identify pain points, throw resources at them, and then check a box. The tough part is that the same box will be on next year's checklist, even if financial and other resources remain unchanged. So, as more deficits surface, leaders devote their time to looking for more resources instead of solving problems. Though this cycle has gone on for decades, it clearly isn't working.

Thankfully, leaders across most industries now agree that to succeed at EDI, organizations must embrace a new paradigm. I concur! It's time to breathe life into a new equity model - one that helps leaders view their current organizations with fresh perspectives and gives them demonstrable, integrated, and sustainable practices and tools that will advance Equity, Diversity and Inclusion and transform organizations.

After decades of research and consulting with some of the most values-rich leaders in the world, our team developed a comprehensive toolkit to help organizations achieve breakthrough EDI results. We designed this toolkit to give leaders, managers, and organizations the skills they need at every step of the EDI process, from the introduction of Equity, Diversity and Inclusion as values to the development and institution of practices needed for long-term EDI success.

We created the Equity, Diversity and Inclusion Organizational Self-Assessment to help leaders and organizations begin the EDI journey with clear goals. Use this tool to help your executives get a clearer and shared understanding about the current state of your organization's EDI process, as well as where you'd like to be in the future. Next, take advantage of our Equity Toolkit™ online series. The Equity Toolkit™ will help you build the internal capacity for organizational growth and position you to articulate and advance your EDI goals. Along the way, please know that you can reach out to DeEtta Jones and Associates at any point in your process. We would love to help you along your journey.



# EQUITY, DIVERSITY, AND INCLUSION STATUS AND PLANNING ASSESSMENT

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*Use the checklist below to review the status of your current Equity, Diversity and Inclusion infrastructure and plan for future investment and growth.*

## EDI FOUNDATION

### Do we:

- ☐ Have an Equity, Diversity, and Inclusion (EDI) statement?
- ☐ Have a nondiscrimination policy and/or Code of Conduct?
- ☐ Have a shared language and understanding regarding equity, diversity, inclusion, and cultural competence?
- ☐ Have an Equity, Diversity and Inclusion Strategy that ties EDI goals to core organizational objectives?
- ☐ Have Equity Lenses to apply to various systems and processes?
- ☐ Have the internal capacity to support our ongoing pursuit of EDI objectives?
- ☐ Require ongoing professional development and training regarding EDI and cultural competence best practices for all staff?

## WHERE ARE WE NOW?

Ask and answer these questions about your organization's current reality. Get a sense of what you have, want, and need. For areas where you have not made past investments, consider why those investments haven't been made and whether recent changes might better position you for success going forward.

### Do we:

- ☐ Have a solid base of employees whose values, knowledge, and skills advance our EDI objectives?
- ☐ Successfully attract, hire, and retain people from diverse backgrounds at all levels of our organization?
- ☐ Incorporate EDI goals into the creation of executive and managerial work plans and performance evaluations?
- ☐ Have clearly stated organization-wide expectations (e.g., in policies and performance plans) about how cultural competence should be demonstrated?
- ☐ Consistently invest in, recognize, and reward investment in learning about EDI topics, including the cultural attributes of colleagues and customers?
- ☐ Have targeted and adequately resourced initiatives to address current areas of inequity or the specific needs of employees from diverse backgrounds?
- ☐ Have an assessment program that collects and analyzes data for use in the EDI planning process?

## FOCUS ON ASPIRATION

Articulate a common, shared agreement about - and consistently remind yourself and your team about - why you are making EDI a priority. Focusing on a compelling future is a powerful motivator!

## LOOKING FORWARD, WE WILL HAVE:

- ☐ Cultivated a diverse work force that takes into consideration the demographics of our profession, customer base, and local geography.
- ☐ Created a senior leadership team and governing body that include people from a wide array of diverse lived experiences.
- ☐ Made significant progress on core equity issues that require major review and redesign of our structures and systems.
- ☐ Integrated equity, diversity, and inclusion into our core business operations, thereby ensuring ongoing progress, funding, and sustainability for EDI efforts.
- ☐ Earned a reputation for being a best place to work for people from a variety of diverse backgrounds.
- ☐ Developed the ability to measure the benefits of employees' cultural competence on internal climate, customer service, product development, and other critical areas.

# ABOUT DEETTA JONES



DeEtta Jones is Founder and Principal of DeEtta Jones and Associates (DJA), a consulting firm that helps organizations enhance workplace culture and performance. DeEtta brings deep subject matter expertise and more than 25 years of consulting experience that translate into research-based wisdom conveyed in ways that are practical for leaders at any stage of their journey.

In 2019, DeEtta launched the Equity Toolkit,<sup>™</sup> an online learning series that equips leaders with the essential skills and tools for organizational transformation. DeEtta's experience also includes designing and launching 13 leadership programs,

facilitating over 100 strategic planning and organizational culture consulting engagements, and delivering training for tens of thousands of managers and leaders all over the world. She is now one of the most sought-after speakers and consultants in her field.

Before founding DJA in 2005, DeEtta served for 10 years as Director of Diversity and Director of the Office of Leadership and Management Services at the Association of Research Libraries, a not-for-profit representing the largest research institutions in North America. Prior to this, she was Director of Multicultural Education at Colorado State University and Director of Human Rights Advocacy and Education for the City of Fort Collins.

DeEtta has an MBA from The Johns Hopkins University. She earned her M.S. in Student Affairs and B.S. in Psychology from Colorado State University.

**“ HOW WE DO THE  
SEEMINGLY SMALL THINGS,  
CONSISTENTLY WELL, MAKES  
ALL THE DIFFERENCE. ”**

**- DeEtta Jones**