

Racial Equity Assessment

Understand and transform your company to meet this moment.

CtW Investment Group & SEIU Webinar
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What is the Goal of a Racial Equity Assessment?



What is a Racial Equity Assessment?

Understand the state of racial equity in your company and the roadmap to build opportunity.

Inquiry

Roadmap

Opportunity

The case for racial equity assessment

**Long term
financial
performance**

**Increased
innovation**

**Customer,
shareholder,
employee
expectations**

**Align values
and actions**

IN THIS
AS IN THE HEARTS OF THE PEOPLE
FOR WHOM HE SAVED THE UNION
THE MEMORY OF ABRAHAM LINCOLN
IS ENSHRINED FOREVER

**“There is a moral case for diversity
and inclusion. And there’s a
business case. . .**

**But the last few years have told us
there is a democracy case, too.”**


-- Cyrus Mehri, Wall Street

Journal 01/09/21

Defining and measuring success

Use assessment to set your goals for diversity, equity and inclusion --

-- and build the foundation to meet them.

A top-down view of a meeting table with laptops, tablets, and people's hands. The background is a warm, golden-brown color with a subtle pattern of office supplies and people's hands. The text is overlaid on a black background.

“The Coca-Cola Company recognizes that diversity is a fundamental and indispensable value and that the Company, its shareholders and all of its employees will benefit by striving to be a premier “gold standard” company on diversity. . .

. . . The Company will set measurable and lawful business goals to achieve these objectives.”



How Should You Conduct a Racial Equity Assessment?

Define the scope.

Evaluate your
business practices
and engage key
stakeholders



Investors



Customers



Employees



Suppliers



**Community
Stakeholders**

Apply the diversity principle

Identify all the capacities and perspectives you need to meet your goals.



Working IDEAL and Mehri & Skalet Assessment Team

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Our Network of Collaboration Partners



ANTHEM OF US



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Start with leadership and work at all levels

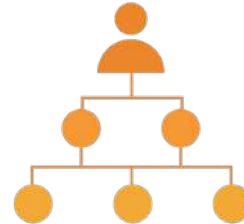
Identify and engage the process owners



**Chief DEI
Officer**



**Human
Resources**



CEO



Legal



**Business
Operations**



Use a robust, multiple method approach to collect & analyze data

**Anonymous
and online
(survey)**

**Private and
interpersonal
(interviews,
focus groups)**

**Existing
historical record
(data, documents)**

**Baseline and
Benchmark
(current levels,
goals)**

Ensure Integrity and Credibility



**Third party
direct an
interactive
process**

**Assessment
team has valid
methodology**

**Findings are
objective and
independent**

**Consider all
perspectives
and contexts**



Build Trust Through Transparency

**Explain
process and
roles**

**Commit to
share results
and roadmap**

**Clarify what
can and cannot
be shared & why**

**Demonstrate
process is safe
and trusted**



The Cost of Not Doing Enough

“Institutional Courage” is the willingness to hear the truth and do what is right, even if it involves some challenge.

**Meeting the requirements is not good enough.
We need new strategies. Better ideas.
Leadership, vision, and action.**

Substance, not symbols.

Case Study: The Rooney Rule Diverse Slate Policy

A good policy is
a first step

Implementation
matters:
Support and
Accountability

Research drives
new best
practices

Ongoing
evaluation to
understand,
adapt, improve

Inclusive Prosperity

Making a clear commitment to equity for all

We urge leading investors to support companies that build long-term value by investing in their employees and communities
-- Business Roundtable 2019



Visit us at workingideal.com to learn more.
Contact us for an accessible version of this slide deck.