

# CHECKLIST | DIVERSITY, EQUITY, INCLUSION AND BELONGING PROGRAMS

Presented by Sahouri Insurance

Employers often use diversity, equity, inclusion and belonging (DEIB) programs to tap into the strengths of their current and future workforces. An employer's specific business case for pursuing these initiatives is typically closely aligned with the organization's overall mission and goals.

The value from DEIB efforts can often be achieved through an employer emphasizing awareness, education and positive reinforcement of the qualities and experiences that make each employee unique. After all, when employees feel welcomed and supported, employee engagement and retention are both likely to increase. DEIB programs meet employee desires and help solve business challenges. These programs can also help retain, attract and equip workers to feel at home and positively contribute daily.

DEIB initiatives and programs implemented by one employer may be different from others. Some employers may be years into such initiatives, while others may be exploring whether formal DEIB initiatives are right for their organization. Either way, this checklist outlines a general process for considering, developing and maintaining a general DEIB initiative. This process could be applied when considering new programs or policies.

Research and Planning	Completed
Research industry best practices and successful DEIB initiatives.	<input type="checkbox"/>
Benchmark DEIB findings against similar organizations or competitors to gain insights into workers and programs.	<input type="checkbox"/>
Assess organizational needs for DEIB programs. Employers could thoroughly analyze the current DEIB landscape within the organization to identify areas for improvement and set specific goals. For example, uncovered issues could include high attrition rates or a need to increase age diversity.	<input type="checkbox"/>
Identify areas for improvement related to DEIB. Employers commonly gather insights from employees with engagement, pulse and exit surveys.	<input type="checkbox"/>
Assess organizational goals and how they align with DEIB efforts.	<input type="checkbox"/>
Connect the program to business objectives (e.g., goals, core values and other companywide efforts). Here are some common examples of DEIB initiatives: <ul style="list-style-type: none"><li>• Learning and development programs</li><li>• Employee resource groups</li><li>• Mentorship and sponsorship opportunities</li><li>• Reevaluating workplace policies</li><li>• DEIB training</li><li>• Attraction and retention strategies</li><li>• Corporate social responsibility</li><li>• Environmental, social and governance</li></ul>	<input type="checkbox"/>

*This checklist is merely a guideline. It is neither meant to be exhaustive nor meant to be construed as legal advice. It does not address all potential compliance issues with federal, state or local standards. Consult your licensed representative at Sahouri Insurance or legal counsel to address possible compliance requirements. © 2023 Zywave, Inc. All rights reserved.*

Understand applicable laws when creating, expanding or restructuring a program. In addition to applicable federal laws to prevent unlawful and unfair employment practices, some state governments have passed legislation. Employers must check and monitor the state laws where their company is located to ensure compliance and prevent litigation. They should consult with local legal counsel.	<input type="checkbox"/>
Set specific program goals to measure progress and success.	<input type="checkbox"/>
Leverage metrics and data to support the need or progress of a DEIB program.	<input type="checkbox"/>
Calculate the return on investment to help validate the program.	<input type="checkbox"/>
Get stakeholder buy-in. Getting buy-in does not mean 100% agreement with a plan or initiative, but it's receiving the support of key team members or stakeholders.	<input type="checkbox"/>

Design and Implementation	Completed
Assign an owner or leadership group to the program. This could be a manager, an HR employee or others who champion the initiatives.	<input type="checkbox"/>
Define clear program objectives, connecting them to the organization's business goals.	
Establish clear strategies or approaches.	<input type="checkbox"/>
Set a program budget.	<input type="checkbox"/>
Identify desired outcomes of the program. Metrics and other accountability measures are necessary to ensure that the program remains on track and that any progress or success can be communicated to key stakeholders and the wider organization.	<input type="checkbox"/>
Develop a clear, written policy and guidelines about the program. Criteria can help outline: <ul style="list-style-type: none"> <li>• Expected employee behavior</li> <li>• Expected outcomes or results</li> <li>• Timelines and milestones</li> <li>• Criteria for success</li> </ul>	<input type="checkbox"/>
Integrate the program into existing organizational structures, including communication channels.	<input type="checkbox"/>
Provide resources and support for employees to engage appropriately and effectively.	<input type="checkbox"/>

Measurement and Evaluation	Completed
Establish mechanisms for ongoing evaluation and feedback. For example, open-ended exit interview questions could uncover organizational DEIB-related issues or prompt feedback and suggestions for DEIB programs. Alternatively, DEI survey questions could be built into a greater employee satisfaction survey to understand employee sentiment while the organization still employs them. This could offer a good snapshot of the current landscape and flag potential gaps or opportunities.	<input type="checkbox"/>
Deploy an employee satisfaction survey that captures sentiment about the program and overall organizational efforts.	<input type="checkbox"/>
Measure progress and results against previously identified program goals or benchmarks.	<input type="checkbox"/>
Adjust the program or strategies if milestones aren't being met or if they are meeting employees' needs. It's OK to optimize them as new information or data may become available.	<input type="checkbox"/>
Commit to a cycle of continuous improvement to sustain the long-term impact of the DEIB program.	<input type="checkbox"/>
Integrate the program into existing organizational structures, including communication channels.	<input type="checkbox"/>
Provide resources and support for employees to engage appropriately and effectively.	<input type="checkbox"/>

For additional workplace resources, contact Sahouri Insurance.