



Materials Review

The first step of an Inclusivity Assessment is a materials review, where we collect and analyze internal documentation. The purpose is for Inclusivity to gain a foundational understanding of the organization and insight into the current state of workplace culture. This information will be referenced throughout the project and is a key input for the recommendations.

Please note, this document is provided as guidance only. The listed materials are not required, and please supplement with any other information you may feel is relevant.

1. KEY STAKEHOLDERS

- Organizational chart / governance structure
- Key stakeholders (partners, clients, investors, suppliers, etc.)
- Peer organizations/competitors
- Relevant partnerships/agreements

2. DOCUMENTATION, PLAN, POLICIES & COMMUNICATION

- Organization's vision & values
- Annual reports and strategic plan
- Committee & subcommittees, ERG (employee resource groups), terms of reference, plans, progress
- Related work and policies such as
 - ◀ EDI policy
 - ◀ EDI plans and Goals
 - ◀ Messaging from leadership (internal/public)
 - ◀ Indigenous relations and reconciliation strategy
 - ◀ Partnerships with organizations
 - ◀ Previous surveys and subsequent initiatives
- Internal and external communications (e.g. journal, magazine, blogs, newsletter, social media)
- People and culture processes & policies that are related to culture such as employee handbook, recruitment and hiring, performance reviews, pay and benefits, onboarding, exit interviews, development and training, vacation and holidays
- Internal reporting methods such as hotline, anonymous forms, bullying and harassment policy
- External processes and policies that are related to culture in areas such as client/member relations, service/product development, applying for services, responding to complaints, providing resources to clients/members
- Processes and policies related to the board – recruitment, nomination process, terms, onboarding package
- Processes and policies related to volunteers - recruitment, onboarding, support
- Internal and external activities that are related to culture such as celebration, events, team building

3. DATA

- Demographic data
- Compensation data/internal equity data
- Surveys (e.g. engagement surveys, satisfaction surveys from clients/service user)

4. INDUSTRY LITERATURE

- Industry relevant literature (e.g. demographics of the profession, industry reports about workplace culture, internal research/benchmarking)
- ***Please provide a list of peer organizations; this will be used to inform our sector research***

