

# Equity Assessment Tool

## WHAT IS IT

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The **Equity Assessment Tool (EAT)** is a self-assessment framework designed to help organisations reflect on how the different policies, processes and practices that together constitute the day-to-day work environment of their employees might be working to the advantage or disadvantage of certain individuals or groups.

The tool is divided into 5 sections:

- Recruitment & Hiring
- Development & Advancement
- Performance & Remuneration
- Benefits & Wellbeing
- Policies & Practices

Each section is divided into a number of sub-sections, each corresponding to a policy, process or practice, and each sub-section is composed of a number of statements describing specific equity-related aspects of the policy, process or practice in question. You as the user can then assess the degree to which your organisation adheres to each statement using a 5-level Likert scale - Never, Rarely, Sometimes, Often and Always. Results are consolidated in an easy to interpret dashboard.

Additional features include:

- Alongside each statement, a **short explanation** of why it is important
- **Links** to articles, videos or other resources providing further insights and a deeper dive into the issues raised by each statement
- **Examples** of metrics that may be used to assess the equity of each process, policy or practice and to monitor progress over time
- A **consolidated resource library** which summarises the resources referenced against each statement
- A **Glossary** that contains short definitions of the key terms related to DEI (Diversity, Equity & Inclusion) referred to in the assessment tool.
- A **dashboard** that provides a consolidated view of the overall assessment completed by users
- **Data Export functionality** so that you can copy data across to a Consolidated Dashboard (if you plan to assess multiple business units or regions)

## WHAT IT IS NOT

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Though it may be treated as the basis for a formal audit, the Equity Assessment Tool was not conceived with this intention and is not a certification.

The tool was deliberately developed in Excel so that it is as accessible as possible to all personnel across your organisation, it is not a piece of software, therefore reducing the need for additional downloads, updates and of course, ongoing subscription fees or licence.

## WHO IS IT FOR

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Any organisation looking to understand where there are disparities in the way its processes, policies and practices impact different individuals or groups. While a basic familiarity with Excel is helpful, no technical expertise is required to use the tool as delivered.

## HOW YOU CAN USE IT

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Our clients use the EAT in different ways, depending on where they are in their DEI journey and their company culture, and on their specific objectives.

We have seen the following approaches:

- HR complete the assessment without involving the business - this is effectively an audit
- HR send the tool to managers and ask them to self-assess - again, this focuses principally on the assessment aspect
- HR and the business hold a series of workshops structured around specific sections or sub-sections of the tool - typically, the focus here is less on the assessment perse, and more on the discussions the tool provokes, the issues it raises and the ideas for solutions that are generated

We highly recommend the third approach, as it can be extremely helpful in rendering the concepts of equity and inclusion more concrete for managers and in building their engagement as they reflect on how they can contribute to building a more inclusive and equitable work environment.



# Packages to choose from

## The cost of the tool is CHF 5'000

In addition, you must choose from the following implementation packages:

### Standard (CHF 1'450)

- Standard version of the tool including 1 hour introductory video call to present the tool in detail and review your objectives plus 1 hour to post assessment debrief
- **Half-day consulting** - may be used for customisation of the tool (e.g. creation of additional sub-sections) or for support during assessment (e.g. facilitation of workshops, development of action plans).

**Total cost incl. implementation: CHF 6'450**

### Premium (CHF 5'800)

- Standard version of the tool including 1 hour introductory video call to present the tool in detail and review your objectives plus 1 hour to post assessment debrief
- **2 days consulting** - may be used for customisation of the tool (e.g. creation of additional sub-sections) or for support during assessment (e.g. facilitation of workshops, development of action plans).

**Total cost incl. implementation: CHF 10'800**

### Enterprise (CHF 11'600)

- Standard version of the tool including 1 hour introductory video call to present the tool in detail and review your objectives plus 1 hour to post assessment debrief
- **4 days consulting** - may be used for customisation of the tool (e.g. creation of additional sub-sections) or for support during assessment (e.g. facilitation of workshops, development of action plans).

**Total cost incl. implementation: CHF 16'600**

The cost of the tool can be pro rata based on the number of sections you prefer to include. This option starts with a minimum of two sections (full version is five sections). For example, if you want to begin with Recruitment & Hiring and Development & Advancement, then the cost of the tool would be CHF 2'000 plus the appropriate implementation package.



### MEDTECH SECTOR

Company A launched their DEI strategy several years ago and are some way into their DEI journey. They used the tool across their global regions to assess progress and identify actions to add to their DEI strategy.

They have now decided to self-assess on an annual basis and to integrate the tool fully into their maturity assessment and progress their monitoring process.



### MINING & ENERGY SECTOR

Company B launched their DEI strategy last year. They used the tool as a framework around which to structure a series of workshops, co-facilitated by HR and Thriving Talent consultants, aimed at familiarising managers with the concept of equity and at stimulating reflections on the bias embedded in current practices.

They now plan to use the tool as a checklist as they co-create solutions to de-bias policies and processes.

## Request a demo

One of our DEI consultants will be able to provide an overview of the tool to you on Zoom (or Teams) in around 30 minutes. This short, interactive session encourages questions as we talk you through the basic functionality of the tool to help you to understand how it can help you and your organisation. [You can request your demo here.](#)