

EQUAL^{by}30

SELF-ASSESSMENT TOOL

For inclusion, diversity, equity and accessibility actions

EQUAL^{by}30

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CONGRATULATIONS!

Your organization has committed to the Equal by 30 campaign and is making a positive impact by advancing diversity, equity, and inclusion in the energy sector.

INSTRUCTIONS FOR SELF-ASSESSMENT: By completing the self-assessment checklist on the following pages, your organization will better understand the progress made in reaching your gender equality and inclusivity goals. This tool is **completely voluntary and confidential**, fill in what you can to the extent you are able. This tool is meant to be an internal check-in, to help you understand where you are excelling, and where there is room for improvement. We do not expect your organization to have implemented all the actions listed, they are goals to work towards on the road to 2030.

Step 1: Designate a team member with knowledge of the organization's diversity, equity, and inclusion policies & practices to lead the completion of the assessment. This may require the coordination of other teams in the organization to get the full data set necessary to fill in the assessment.

Step 2: Gather organizational information about the campaign's core objectives, as well as the challenges and themes identified through the [2021 Equal by 30 Reporting Framework](#): equal pay, equal leadership, equal opportunities, inclusive culture, fair management, career development, and workplace safety/harassment.

Step 3: Fill in the assessment to the best of the team's capability. Each box you check off will aid in tracking your organization's progress toward gender diversity, equity, and inclusion. Unchecked boxes can be used to hone in on your organization's areas for growth and improvement. Please skip questions that you are not currently able to answer.

Step 4: Reflect on the findings of this assessment. Celebrate the progress and strengths you've identified and think about what steps contributed to these successes. Create an action plan to address any areas for improvement, using the commitment, implementation, measurement, and transparency sections as a benchmark against what you are doing and where you can improve.

Step 5: Share your results within your organization. Your organization will benefit from a transparent assessment process, and support for further actions will be strengthened. Save these results so that you can track progress as we work towards our 2030 goals. You are also encouraged to share your results and any questions with the Equal by 30 team who can help support your journey.

We thank you for committing to the Equal by 30 campaign and are here to support you on your journey to creating a more diverse, equitable, and inclusive workplace. Please reach out to us [here](#) should you wish to discuss available resources and concrete steps to take to address the challenges your organization is facing.

Does the organization have a commitment and/or process in place to ensure all employees receive equal compensation for substantially the same work?

No, the organization does not have a process in place to ensure this, but:

We are striving to learn more.

We have a plan we intend to implement within the next 12-18 months.

Some of our offices or businesses have implemented our plan.

Other (please use the comment box below to describe any actions your organization has taken in this area)

Yes, the organization has a commitment and process for equal pay that has been implemented across all levels of the organization.

The organization has a gender equality specific commitment and process to ensure equal pay that has been implemented across all levels of the organization.

Commitment

We have a stand-alone policy that addresses equal pay for equal work of equal value and this policy has been circulated to all staff ensuring they are aware of its significance.

We have made a public written statement, that is easily accessible, outlining our organization's commitment to equal pay.

Measurement and Implementation

The organization has an action plan to ensure equal pay and that pay equity exists across all levels of the organization.

The organization conducts pay equity exercises, ensuring that women-dominated roles (such as human resources) have their value assessed and wages compared to traditionally men-dominated roles and adjusted accordingly to demonstrate that they bring equal value to the organization.

The organization takes an intersectional approach to pay equity – with tangible plans to ensure employees with intersecting identities are compensated to the same extent as their counterparts who are men.

The organization publishes salary ranges internally and provides managers with resources and support to ensure bias-free decision-making in the hiring and promotional processes.

The organization tracks performance and promotion rates by gender, disaggregated by race, ethnicity, (dis)ability, gender identity, gender expression, sexual orientation, and/or age group to identify bias.

Measurement and Implementation *continued*

The organization's policies align with territorial pay equity legislation even if they are not legally required to comply with it.

The organization publishes the pay scale for a position on all job postings.

The organization's strategy and action plan are developed in consultation with industry professionals to determine best practices and how to track metrics.

Transparency and Accountability

We report publicly to organizational stakeholders, board members, and on the organization's website on progress and strategy commitments, targets, best practices, and areas for improvement.

We share our findings internally, through all levels of the organization, and tie them to compensation and bonus structure to ensure accountability.

Additional Notes & Comments

Please use this area to demonstrate any additional actions your organization has taken to advance Equal Pay that may not be listed above.

Is there a commitment and/or process at the organization to ensure equal representation of women in senior leadership, regardless of gender expression, age, ability, race, ethnicity, religion, sexual orientation, and/or socio-economic status?

No, the organization does not have a process in place to ensure this, but:

We are striving to learn more.

We have a plan we intend to implement within the next 12-18 months.

Some of our offices or businesses have implemented our plan.

Other (please use the comment box below to describe any actions your organization has taken in this area)

Yes, the organization has a commitment and process to ensure equal representation in leadership.

The organization has a gender equality-specific commitment and process to ensure equal representation in leadership that has been implemented across all levels of the organization.

Commitment

We have a corporate policy, circulated internally, that addresses the importance of equal representation in leadership and outlines the steps the organization is taking to accomplish this.

We have made a public written statement, that is easily accessible, outlining our organization's commitment to equal representation in leadership.

Measurement and Implementation

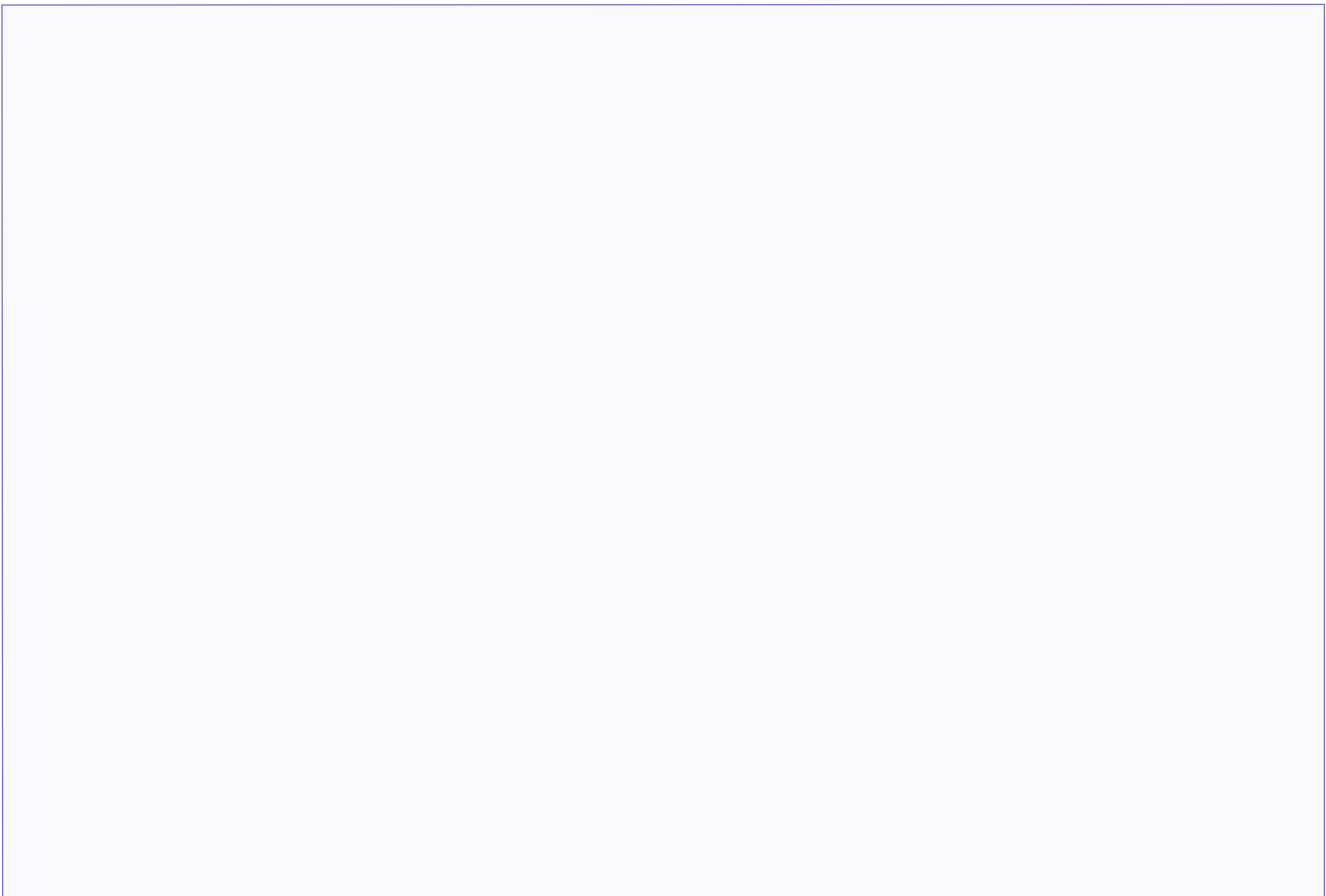
The organization includes gender parity across all levels, in all departments, as part of its strategic agenda.

The organization ensures 30-50% of Board seats are filled by women and gender-diverse people.

The organization ensures that 30-50% of its Board seats are filled by people who identify as members of equity-deserving groups.

The organization ensures that equity-deserving groups represent more than 30% of all senior management positions.

Members of senior leadership are mandated to take meaningful diversity and inclusion training, at a minimum annually, to ensure they are aware of barriers facing equity-deserving groups in non-traditional positions and are kept up to date on all areas of improvement.



EQUAL OPPORTUNITIES

Is there a commitment and/or process to ensure equal opportunities for all employees, regardless of gender identity, gender expression, age, ability, race, ethnicity, religion, sexual orientation, sexuality, and/or socio-economic status?

No, the organization does not have a process in place to ensure this, but:

We are striving to learn more.

We have a plan we intend to implement within the next 12-18 months.

Some of our offices or businesses have implemented our plan.

Other (please use the comment box below to describe any actions your organization has taken in this area)

Yes, the organization has a commitment and process to ensure equal opportunities for all employees.

The organization has a gender equality-specific commitment and process to ensure equal opportunities for employees.

Commitment

We have an equal opportunity policy at the organization that was informed by internal and/or external expertise and have circulated this to ensure all staff are aware of the significance of this.

We have made a public written statement, that is easily accessible, outlining our organization's commitment to access to equal opportunities in the workplace.

Measurement and Implementation

The organization ensures all employees are aware of new job postings.

The organization emphasizes its support for the short- and long-term ambitions of all employees.

Women and gender-diverse employees have access to internal mentoring programs and/or sponsorship from a senior leader and access to Employee Resource Groups.

Employees from all equity-deserving groups have access to internal mentoring programs and/or sponsorship by a senior leader and access to Employee Resource Groups.

The organization has programs designed to support women and gender-diverse people in men-dominated roles and men in women-dominated roles.

The organization has systems in place to ensure that career development programs support the needs of all employees.

The organization has systems in place to prevent bias, discrimination, or harassment related to career progression.

EQUAL OPPORTUNITIES

Measurement and Implementation *continued*

The organization ensures that there are processes to track and monitor the attendance, impact, and effectiveness of the programs available.

The organization ensures that senior leaders participate in the programs available, such as reverse mentoring, for more junior staff members.

The organization forbids the inquiry, during the application or recruitment process, of status or plans related to the following: marriage, caregiving, disability, sexuality, gender identity or expression, family status, religion, age, and pregnancy.

The organization removes names and home addresses from resumes of candidates before passing along for review to attenuate unconscious bias in recruitment and hiring.

Transparency and Accountability

We report publicly to organizational stakeholders, board members, and on the organization's website on progress and strategy commitments, targets, best practices, and areas for improvement.

We share our findings internally, through all levels of the organization, and tie them to compensation and bonus structure to ensure accountability.

Additional Notes & Comments

Please use this area to demonstrate any additional actions your organization has taken to advance Equal Opportunities that may not be listed above.

INCLUSIVE CULTURE

Does the organization have a commitment and processes in place to foster and uphold an inclusive culture for all people, regardless of gender identity, gender expression, age, ability, race, ethnicity, religion, sexual orientation, sexuality, and/or socio-economic status?

No, the organization does not have a process in place to ensure this, but:

We are striving to learn more.

We have a plan we intend to implement within the next 12-18 months.

Some of our offices or businesses have implemented our plan.

Other (please use the comment box below to describe any actions your organization has taken in this area)

Yes, the organization has a commitment and processes in place to foster and uphold a culture of inclusivity and belonging.

The organization has a gender-specific commitment and process in place to foster and uphold a culture of inclusivity and belonging.

Commitment

We have circulated an internal policy, advised by external and/or internal expertise, that outlines the steps the organization is taking to ensure an inclusive culture.

We have made a public written statement, that is easily accessible, outlining our organization's commitment to creating an inclusive culture.

Measurement and Implementation

The organization provides all staff with regular development workshops and training on diversity and inclusion, cultural awareness, unconscious bias, communication skills, and conflict management.

The organization ensures that inclusivity is written into the values of the organization, with support from executive management.

There is a publicly communicated business case for inclusion with management support.

The organization has an anonymous feedback or recommendation tool that employees, particularly those from equity-deserving groups, can feel confident and safe in using when providing feedback to senior leadership.

Leaders within the organization are diversity and inclusion champions. *(This may be a senior leader, middle management, or committee.)*

The organization has mental health and diversity & inclusion targets, activities, and/or committees.

Measurement and Implementation *continued*

New hires are paired with experienced employees on a voluntary basis to better facilitate their onboarding process.

The organization allocates budget and ensures management has access to tools and support systems to ensure persons with disabilities can do their job successfully and to the best of their abilities. *(This may include access to Braille, American Sign Language, captioning services, etc.)*

The organization has a policy and processes in place to provide accommodation for persons with disabilities.

The organization has a flexible work environment to best accommodate its employees and to remove barriers to employment faced primarily by women and persons with disabilities. *(This may look like flexible working hours and/or a hybrid work environment.)*

All employees physically have access to all parts of the office, including restrooms, changing rooms, and access to all utilities.

The organization has accessibility policies and tools for all websites and communication documents.

The organization recognizes that different holidays are celebrated by different cultures and offers a form of holiday swapping or floating holidays in their human resources policies.

The organization has a childcare program or subsidies available to parents returning to work after a leave of absence for caregiving responsibilities.

Transparency and Accountability

We report publicly to organizational stakeholders, board members, and on the organization's website on progress and strategy commitments, targets, best practices, and areas for improvement.

We share our findings internally, through all levels of the organization, and tie them to compensation and bonus structure to ensure accountability.

Additional Notes & Comments

Please use this area to demonstrate any additional actions your organization has taken to advance Inclusive Culture that may not be listed above.

FAIR MANAGEMENT

Does the organization have a commitment and processes in place to ensure fair and equal management for people, regardless of gender identity, gender expression, age, ability, race, ethnicity, religion, sexual orientation, sexuality, and/or socio-economic status?

No, the organization does not have a process in place to ensure this, but:

We are striving to learn more.

We have a plan we intend to implement within the next 12-18 months.

Some of our offices or businesses have implemented our plan.

Other (please use the comment box below to describe any actions your organization has taken in this area)

Yes, the organization has a commitment and processes in place to ensure fair and equal management for all employees.

The organization has a gender equality-specific commitment and process in place to ensure fair and equal management for its employees.

Commitment

We have circulated an internal acknowledgement of the importance of fair management at all levels of the organization and provide all managers with training to support this initiative.

We have made a public written statement, that is easily accessible, outlining our organization's commitment to fair and equal management across the organization.

Measurement and Implementation

The organization has systems in place to address bias, discrimination, and stereotypes in its performance reviews and promotion or success processes.

The organization has put in place recruitment practices to ensure equitable opportunities for all and encourage more women and candidates from equity-deserving groups to apply for open positions. *(This includes racial and ethnic minorities, Indigenous peoples, persons with a disability, and members of the LGBTI community.)*

All managers with direct reports, including senior leaders, participate in diversity, inclusion, and sensitivity training.

Managers and employers recognize that work can be accomplished successfully in different, yet equally effective, ways.

The organization considers what qualifications are necessary based on the work to be performed, ranked by the importance of each qualification up-front to not exclude women and individuals from equity-deserving groups who are less likely to apply for a position if they do not meet every qualification.

Measurement and Implementation *continued*

Managers have access to training and human resources supports that facilitate cross-cultural communication between team members.

Managers hold regular check-ins with their employees (e.g., weekly, bi-weekly, and/or monthly) to share feedback, answer questions, and provide support and direction.

In recognizing that equity-deserving groups receive more critical feedback than their non-marginalized counterparts, management has taken steps to ensure all employees receive specific, balanced, and fair feedback which includes concrete actions that management can take to support improvements.

Employees are told about performance concerns in a timely and effective manner, with support from management on how to meet expectations.

Transparency and Accountability

We report publicly to organizational stakeholders, board members, and on the organization's website on progress and strategy commitments, targets, best practices, and areas for improvement.

We share our findings internally, through all levels of the organization, and tie them to compensation and bonus structure to ensure accountability.

Additional Notes & Comments

Please use this area to demonstrate any additional actions your organization has taken to advance Fair Management that may not be listed above.

Does the organization have a commitment and processes in place to ensure equitable and supportive career development is available to all employees, regardless of gender identity, gender expression, age, ability, race, ethnicity, religion, sexual orientation, sexuality, and/or socio-economic status?

No, the organization does not have a process in place to ensure this, but:

We are striving to learn more.

We have a plan we intend to implement within the next 12-18 months.

Some of our offices or businesses have implemented our plan.

Other (please use the comment box below to describe any actions your organization has taken in this area)

Yes, the organization has a commitment and processes in place to ensure support for career development is available to all employees.

The organization has a gender equality-specific commitment and process in place to ensure support for career development is available to its employees.

Commitment

We have circulated an internal policy that recognizes management's support of career development at all levels of the organization, including what financial supports are available and how to access them, taking into consideration and not penalizing those who want to stay at their current employment title and level.

We have made a public written statement, that is easily accessible, outlining our organization's commitment to supporting career development across the organization.

Measurement and Implementation

The organization has formal career development programs, known and available to all employees.

All interview panels and/or hiring committees are diverse, in both gender and racial/ethnic identities at a minimum.

The organization makes sure all employees are aware of the career progression available to them in their current role.

The organization is supportive of non-linear career pathways and supports the individual in making these career decisions. *(This may be parental leave, career or job shifts, and/or lateral moves.)*

Qualified candidates from equity-deserving groups are shortlisted for positions.

Measurement and Implementation *continued*

The organization monitors and tracks disaggregated data on current rates of recruitment, attrition, and promotion aiming for proportional rates at all levels.

Human Resources account for inclusive language in job postings for the organization to attract more women candidates and/or candidates from equity-deserving groups.

The organization ensures professional development courses, such as language training, are offered to newcomers (new immigrants, permanent residents, and/or refugees).

Professional development courses are made accessible and available to junior-level staff.

Transparency and Accountability

We report publicly to organizational stakeholders, board members, and on the organization's website on progress and strategy commitments, targets, best practices, and areas for improvement.

We share our findings internally, through all levels of the organization, and tie them to compensation and bonus structure to ensure accountability.

Additional Notes & Comments

Please use this area to demonstrate any additional actions your organization has taken to advance Career Development that may not be listed above.

WORKPLACE SAFETY & HARASSMENT

Does the organization have a commitment and processes in place to ensure workplace health and safety and freedom from harassment for all employees, regardless of gender identity, gender expression, age, ability, race, ethnicity, religion, sexual orientation, sexuality, and/or socio-economic status?

No, the organization does not have a process in place to ensure this, but:

We are striving to learn more.

We have a plan we intend to implement within the next 12-18 months.

Some of our offices or businesses have implemented our plan.

Other (please use the comment box below to describe any actions your organization has taken in this area)

Yes, the organization has a commitment and processes in place to ensure workplace safety and freedom from harassment for all employees, regardless of gender, age, ability, race, ethnicity, religion, sexual orientation, and/or socio-economic status.

The organization has a gender equality-specific commitment and process in place to ensure workplace safety and freedom from harassment for its employees.

Commitment

We have an internal policy, that was informed by external and/or internal expertise, that states zero tolerance for all forms of harassment and violence at the organization and has been communicated to all staff.

We have made a public written statement, that is easily accessible, outlining our organization's commitment to ensuring zero harassment and a safe workplace across the organization.

Measurement and Implementation

The organization has clear, confidential reporting and remediation mechanisms that are responsive to the needs of different identities. *(This may look like safe third-party reporting or an anonymous in-house reporting tool.)*

The organization has processes to ensure respectful communication and interactions. *(This may look like a hand-raise policy in meetings to diminish interruptions.)*

Workplace harassment is included in health and safety policies and procedures at the organization.

The organization has a non-discrimination, equal opportunity, and workplace harassment policy that is communicated to all employees.

Measurement and Implementation *continued*

The organization reports publicly and to the Board the number and rate of employee turnover, disaggregated by gender and/or race, ethnicity, disability, and sexual orientation, including exit interview responses.

The organization provides access to specific health and safety facilities for women and gender-diverse people. *(This may take the form of safe toilet facilities, chest feeding/pumping rooms, safe access to transportation, and personal protective equipment taking into consideration the needs of pregnant and nursing people.)*

Transparency and Accountability

We report publicly to organizational stakeholders, board members, and on the organization's website on progress and strategy commitments, targets, best practices, and areas for improvement.

We share our findings internally, through all levels of the organization, and tie them to compensation and bonus structure to ensure accountability.

Additional Notes & Comments

Please use this area to demonstrate any additional actions your organization has taken to advance Workplace Safety that may not be listed above.

GLOSSARY OF TERMS

Below is a list of terms you may have seen throughout the document and need more context on. Please note, this self-assessment is using the most internationally recognized terms which may differ from what your own organization uses. These definitions are taken from federal legal and government agencies within Canada, as well as internationally recognized sources.

Equity-deserving groups: The Government of Canada defines equity-deserving groups as a group of people who face barriers that prevent them from having the same access to resources and opportunities that are available to other members of society, due to systemic discrimination. In Canada, the equity-deserving groups identified are women, Indigenous peoples, people with disabilities, people who are members of the 2SLGBTQI+¹ community, religious minority groups and racial and ethnic minority groups. Other interchangeable terms for this may be marginalized groups or under-represented groups.

Harassment and workplace safety: This refers to the legal obligation for a workplace to protect the employee physically and psychologically against all hazards of the job, including, but not limited to freedom from unwanted comments or conduct, discrimination, micro-aggressions, disrespect, and/or abuse.

Inclusive culture: An inclusive culture requires intentional action and understanding, and promotes individualism, respect, and appreciation. This differs from a diverse workplace in that diversity speaks to the population of employees from different demographics with different and intersecting identities, whereas an inclusive culture speaks to the actions the organization takes to uplift, value, and promote its employees.

Intersectionality/intersecting identities: Intersectionality, coined by Kimberlé Crenshaw, recognizes the intersectional identities that contribute to layers of one's oppression. It considers how an individual, for example, a Black woman, faces discrimination on the grounds of her race and her gender. Intersectionality challenges dominant understandings of racism, sexism, homophobia, transphobia, and ableism, and demonstrates how an individual may be marginalized by all aspects of their identity that go against the cisgender-heterosexual dominant society.

Pay equity and equal pay: Pay equity compares the value and pay of different jobs and requires employers to pay traditionally women-dominated jobs the same as men-dominated jobs if they are of comparable value. Equal pay for equal work compares the pay of substantially the same job for the same value internally in an organization, or externally within a specific career in similar organizations, and ensures both men and women are paid equally.

Sponsorship: Similar to mentorship, this is generally an informal or formal professional strategy and career support relationship. However, sponsorship refers to an individual that promotes an individual to other people, recommending them for job openings, and advocating for them when the individual is not in the room.

¹ 2SLGBTQ+ is an acronym used in Canada that stands for Two-Spirit, Lesbian, Gay, Bisexual, Transgender, Queer or Questioning and additional sexual orientations and gender identities. Organizations outside of Canada may be more familiar with the acronym LGBTI.

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