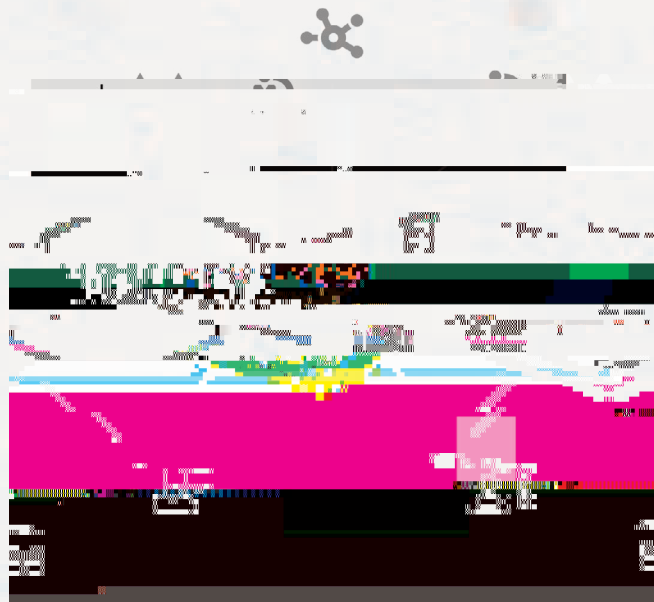


INCREASING EQUITY AT THE WORKPLACE

EMPLOYEE PERFORMANCE ASSESSMENT
AND FEEDBACK SYSTEM TOOLKIT



OVERVIEW:
EMPLOYMENT SYSTEMS AND
LEVERS FOR CHANGE

Introduction to Our Approach: Employment Systems and Levers for Change

Our approach to work equity is centered on the Employee Performance Assessment and Feedback System (EPAFS). This system is designed to provide a fair and equitable process for evaluating and providing feedback to employees. It is a key component of our overall work equity strategy and is designed to be inclusive and transparent.

The EPAFS is a comprehensive system that includes a variety of tools and processes designed to support the organization's goals and values. It is a key component of our overall work equity strategy and is designed to be inclusive and transparent. **Employee Performance Assessment and Feedback System.**

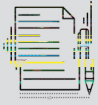


The EPAFS is a comprehensive system that includes a variety of tools and processes designed to support the organization's goals and values. It is a key component of our overall work equity strategy and is designed to be inclusive and transparent. **Levers for Change.** (1.)



Figure 1: Employment Systems and Levers for Change

We consider Levers for Change to be different ways that your organization can strengthen the equity of your Employee Performance Assessment and Feedback System.



Policies

Formal (typically written) policies that establish expectations for various processes, including the equity of employment systems, such as policies that govern recruitment and hiring.



Practices

Written or unwritten specification of steps used to complete tasks, including activities that could affect the equity of employment systems, such as "best practices" related to the supervision of employees.



Planning and Evaluation

Planning, data collection and interpretation of information related to the equity of employment systems, such as conducting "audits" of compensation.



Assignment of Roles and Accountabilities

Designation of one (or more) person(s) who is accountable for Diversity-Equity-Inclusion (DEI) activities related to the equity of one (or more) employment system(s), such as the selection of an HR person to assess the equity of annual employee performances.



Workplace Culture

Values and principles espoused by the organization, including values related to Diversity-Equity-Inclusion, such as statements by top managers about the importance of workforce diversity for innovation.



Workplace Climate

Employees' sense of their everyday work experiences, particularly experiences that affect perceptions of inclusion (that is, a sense of: belonging to the organization, being treated with respect, etc.), such as being invited to offer opinions about decisions that affect employees' jobs.



Communications

Access to information, including information about the equity of employment systems, such as information about possible promotion opportunities.



Steps of Your Employee Performance Assessment and Feedback System Equity Initiative

1. **gather information** (1: [gather information](#)),
2. **identify root causes** (2: [identify root causes](#)),
3. **gain deeper understanding** (3: [gain deeper understanding](#)),
4. **brainstorming and refining ideas** (4: [brainstorming and refining ideas](#)),
5. **pilot testing** (5: [pilot testing](#)).

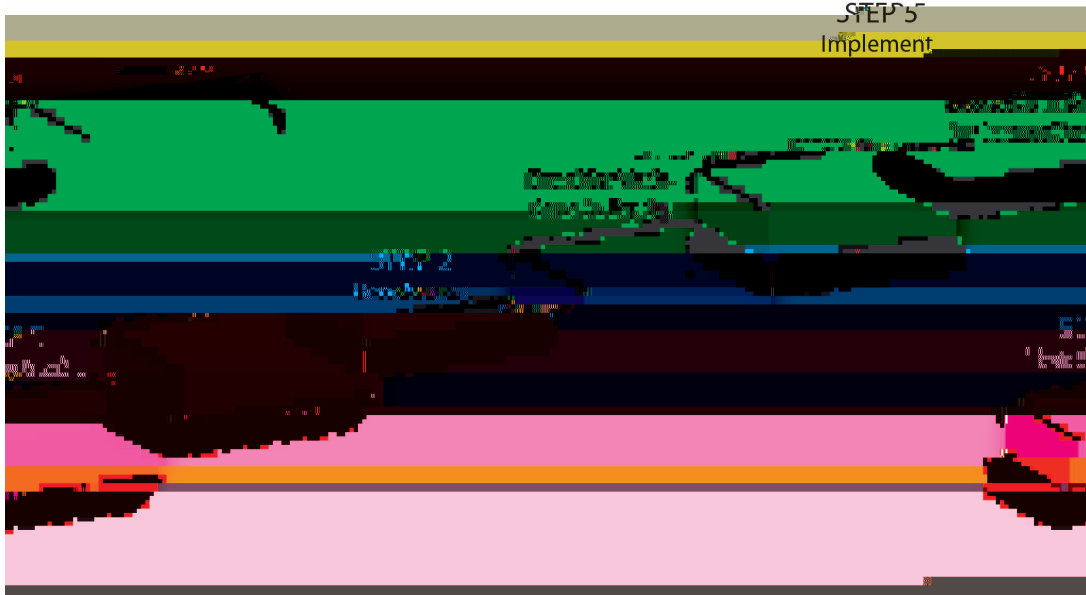


Figure 2: Steps in the Employee Performance Assessment and Feedback System Toolkit

gathering information

Identify root causes

deeper understanding

brainstorming and refining ideas

pilot testing

Roles and Responsibilities for Your Equity Assessment

1. **Identify root causes** (2: [identify root causes](#)),

2. **Gain deeper understanding** (3: [gain deeper understanding](#)),

3. **Brainstorming and refining ideas** (4: [brainstorming and refining ideas](#)),

4. **Pilot testing** (5: [pilot testing](#)).

5. **Implement** (6: [implement](#)).

● **Leader(s) of Your Employee Performance Assessment and Feedback System Equity Initiative:**

- **Who is the leader(s) of your initiative?**
 - (1) **Who is the primary leader(s) of your initiative?** (Name, title, and contact information)
 - (2) **Who is the secondary leader(s) of your initiative?** (Name, title, and contact information)
 - (3) **Who is the tertiary leader(s) of your initiative?** (Name, title, and contact information)
 - (4) **Who is the quaternary leader(s) of your initiative?** (Name, title, and contact information)

● **Members of Your Equity Initiative Committee:**

- **Who are the members of your equity initiative committee?** (Name, title, and contact information)
 - (1) **Who is the primary member(s) of your equity initiative committee?** (Name, title, and contact information)
 - (2) **Who is the secondary member(s) of your equity initiative committee?** (Name, title, and contact information)
 - (3) **Who is the tertiary member(s) of your equity initiative committee?** (Name, title, and contact information)
 - (4) **Who is the quaternary member(s) of your equity initiative committee?** (Name, title, and contact information)

● **Stakeholders in Your Equity Initiative:**

- **Who are the stakeholders in your equity initiative?** (Name, title, and contact information)
 - (1) **Who is the primary stakeholder(s) in your equity initiative?** (Name, title, and contact information)
 - (2) **Who is the secondary stakeholder(s) in your equity initiative?** (Name, title, and contact information)
 - (3) **Who is the tertiary stakeholder(s) in your equity initiative?** (Name, title, and contact information)
 - (4) **Who is the quaternary stakeholder(s) in your equity initiative?** (Name, title, and contact information)

● **Top Managers at Your Organization:**

- **Who are the top managers at your organization?** (Name, title, and contact information)
 - (1) **Who is the primary top manager(s) at your organization?** (Name, title, and contact information)
 - (2) **Who is the secondary top manager(s) at your organization?** (Name, title, and contact information)
 - (3) **Who is the tertiary top manager(s) at your organization?** (Name, title, and contact information)
 - (4) **Who is the quaternary top manager(s) at your organization?** (Name, title, and contact information)

The Process

1. **Identify the key stakeholders in your equity initiative.**

2. **Conduct a work equity audit.** (See Worksheet #1 for more details.)

Go to next page for Worksheet #1

Employee Performance Assessment and Feedback System Toolkit Worksheet #1

Sample Workplan for Completing Tasks for the Employee Performance Assessment and Feedback System Toolkit

Step/ Task	People Involved/Responsible	Target Date for Completion
Form the Employee Performance Assessment and Feedback System Equity Initiative Committee		
Prepare a letter/email inviting employees to join the Employee Performance Assessment and Feedback System Equity Initiative.		
Confirm the membership of the Employee Performance Assessment and Feedback System Equity Initiative Committee.		
Step 1: Take the Audit		
Distribute questions to people who will take survey. (Worksheet #2)		
Aggregate the responses. (Worksheet #3)		
Step 2: Benchmark		
Copy average scores onto Worksheet. (Worksheet #4)		
Compare your organization's scores to data from the National Study of Workplace Equity. (Worksheet #5)		
Discuss the results of your benchmarking with the Equity Initiative Committee.		
Step 3: Consider Variations in Equity		
Convene a meeting of the Equity Initiative Committee to discuss Worksheet #6.		
Step 4: Generate Ideas for Innovation		
Convene a meeting(s) to generate ideas for innovation.		
Determine strengths of Levers for Change. (Worksheet #7)		
Consider innovations in Levers for Change in the Employee Performance Assessment and Feedback System. (Worksheet #8)		
Consider ideas for employee performance assessment and feedback practice innovations. (Worksheet #9)		
Prioritize ideas for innovation in the Employee Performance Assessment and Feedback System. (Worksheet #10)		
Step 5: Implement Innovations		
Specify metrics to measure possible change associated with the pilot of innovation. (Worksheet #11)		
Consider impact of employee performance assessment and feedback innovation on other Levers for Change. (Worksheet #12)		
Implement pilot.		
Monitor implementation process.		
Convene meeting to consider possible implications for the equity of other employment systems.		
Communicate outcomes associated with pilot. (Worksheet #13)		



Go to Step 1 of the Employee Performance Assessment and Feedback System Toolkit: Take the Audit.

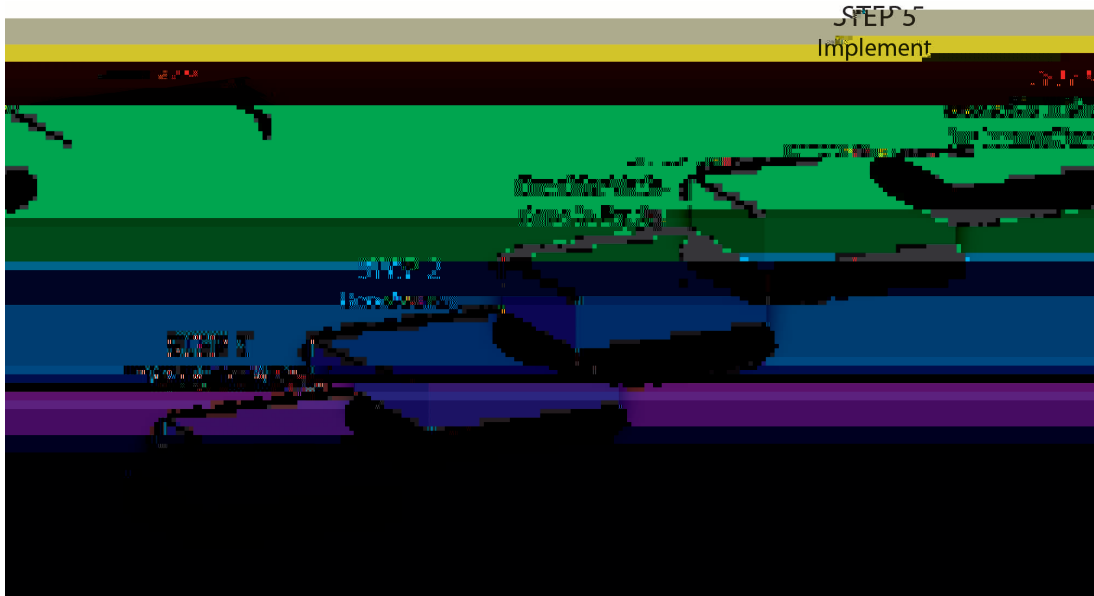


Figure 3: Step 1 of the Employee Performance Assessment and Feedback System Toolkit