

# Diversity, Equity & Inclusion Practices & Policies Survey Overview



From the Center of Excellence for  
**Diversity, Equity & Inclusion**

## SURVEY DETAILS

*10 Minutes*

*6 Survey Categories*

*24 Questions*

*Complete Survey Online at  
[filene.org/deisurvey-landing](https://filene.org/deisurvey-landing)*

## SURVEY CATEGORIES

*Credit Union Information*

*Governance &  
Accountability Practices*

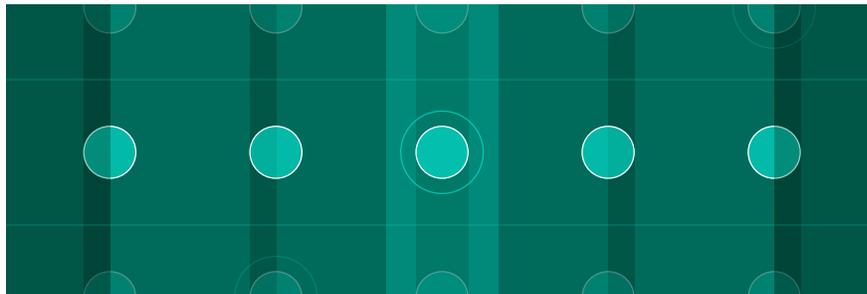
*Staffing*

*Training*

*Development, Work-Life,  
Retention & Supplier*

*Leadership Commitment  
& NPS*

[click here to take the survey](#)



## INTRODUCTION

Filene Research Institute is launching a new study to examine the presence, reach and value-creating effects of DEI practices and policies at credit unions. To do this, Filene is conducting a survey to provide a benchmark for the credit union industry and we need your participation.

Once your credit union's CEO, HR leader or DEI leader has completed the survey, you will get a look at industry performance on DEI policies and practices PLUS your credit union will receive a personalized index of where you fit within the industry benchmark to better invest your DEI resources.



## CREDIT UNION INFORMATION

*In this section you will be asked a few short questions based on your credit union and position.*

What is the name of your credit union?

In what state is your credit union located?

Please indicate your job level within the credit union.

## GOVERNANCE AND ACCOUNTABILITY PRACTICES

*For the following questions and more upcoming, you will be asked to select the best option to identify the existing practices at your credit union. Select the answer that best fits your credit union from the following options:*

- Yes—to be implemented in 2021; 2020; 2019; or pre-2019
- No

	YES 2021	YES 2020	YES 2019	YES Pre-2019	NO
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### **At my credit union:**

We have a written policy or statement that describes the value for DEI in our credit union.

We include DEI in our credit union's strategic plan.

We have a written plan that sets the direction for managing DEI to align with our business activities.

We include DEI in performance appraisals or evaluations

We link DEI goals or metrics to compensation

## GOVERNANCE AND ACCOUNTABILITY PRACTICES (CONTINUED)

### **At my credit union, we have goals focused on:**

Equal employee opportunity and compliance.

Hiring diverse talent.

Retaining diverse talent.

Creating and maintaining an equitable system of practices.

Demonstrating fair and equitable treatment of all employees

Engaging diverse talent.

Creating and maintaining inclusive environments.

### **At my credit union, we collect and track data focused on:**

Equal employee opportunity and compliance.

Hiring diverse talent.

Retaining diverse talent.

Creating and maintaining an equitable system of practices.

Demonstrating fair and equitable treatment of all employees.

Engaging diverse talent.

Creating and maintaining inclusive environments.

### **At my credit union, we have an officer or senior-level official to oversee DEI programs and initiatives.**

### **At my credit union, we have a council or committee for DEI oversight and accountability.**

*For the following questions you will be asked to fill in your answer.*

What is the title of the officer or senior-level official who oversees DEI programs and initiatives?

To whom does that person directly report (e.g., Chief Executive Officer, Chief Human Resource Officer, etc.?)

## STAFFING

*For the following questions, you will be asked to select the best option to identify the existing practices at your credit union. Select the answer that best fits your credit union from the following options:*

- Yes—to be implemented in 2021; 2020; 2019; or pre-2019
- No

### **At my credit union:**

We have a section of our website dedicated to DEI.

We participate in recruiting events designated for diverse talent pools.

We advertise job opportunities in outlets designated for diverse talent pools.

We partner with minority-serving colleges and professional organizations.

We use a structured interview process.

We use diverse interview panels.

We conduct interviewer training.

## TRAINING

*For the following questions, you will be asked to select the best option to identify the existing practices at your credit union. Select the answer that best fits your credit union from the following options:*

- Yes—to be implemented in 2021; 2020; 2019; or pre-2019
- No

**At my credit union, we offer DEI training.**

## TRAINING (CONTINUED)

*For the following statements you will be asked to select yes or no.*

Our DEI training is mandatory.

Our DEI training is part of a larger DEI strategy or program.

*For the following questions you will be asked to fill in the blank*

Our DEI training is \_\_\_\_ hours in duration.

Our DEI training is offered to: \_\_\_\_\_.

## DEVELOPMENT, WORK-LIFE, RETENTION, SUPPLIER

*For the following questions, you will be asked to select the best option to identify the existing practices at your credit union. Select the answer that best fits your credit union from the following options:*

- Yes—to be implemented in 2021; 2020; 2019; or pre-2019
- No

### **At my credit union:**

We identify diverse high potential employees or future leaders.

We offer leadership training for diverse talent.

We have formal mentoring and/or coaching for diverse talent.

We have affinity or network groups.

We have employee resource groups (ERGs)

We offer remote work options.

We offer paid parental leave.

We offer subsidized childcare.

We offer flexible leave.

We have a health and wellness program.

We offer educational benefits.

## DEVELOPMENT, WORK-LIFE, RETENTION, SUPPLIER (CONTINUED)

*For the following questions, you will be asked to select the best option to identify the existing practices at your credit union. Select the answer that best fits your credit union from the following options:*

- Yes—to be implemented in 2021; 2020; 2019; or pre-2019
- No

### **At my credit union:**

We have a written policy or statement that describes value for supplier diversity in our credit union.

We do outreach to attract women- and minority-owned businesses.

We have a registration program for women- and minority-owned businesses.

## LEADERSHIP COMMITMENT AND NPS

*For the following questions you will be asked to select a numerical answer.*

On a scale from 0-100, how would you rate leadership commitment to DEI within your credit union

What is your organizational net promoter score?

## FREQUENTLY ASKED QUESTIONS

### ***What will I be asked to do?***

You will be asked to complete a survey about the DEI practices at your credit union.

### ***What does my participation involve?***

Your participation in this survey is voluntary, and should you agree to proceed with the survey, the survey will take approximately 8-10 minutes to complete.

### ***What happens if I don't want to participate?***

Participation is voluntary, you may choose not to participate at all, or you may refuse to participate in certain procedures or answer certain questions or discontinue your participation at any time without consequence.

### ***How will I benefit from the survey?***

After we have collected and analyzed responses, you will receive a detailed benchmarking report outlining the DEI insights uncovered from this industry-wide survey.

### ***Will my answers be kept confidential and private?***

No personal data or identifying information will be collected and any information you provide on your credit union will be kept confidential in a secure electronic file that is only available to the survey researchers.



If you have further questions about the survey, please contact **Filene Research Institute** at [research@filene.org](mailto:research@filene.org)

**Don't miss this opportunity to advance your credit union and the industry in its DEI journey!**

[click here to take the survey](#)

or visit [filene.org/deisurvey-landing](https://filene.org/deisurvey-landing)