Diversity, Equity & Inclusion Practices & Policies Survey Overview, 2022

From the Center of Excellence for Diversity, Equity & Inclusion

SURVEY DETAILS

12 Minutes
6 Survey Categories
31 Questions
Complete Survey Online at filene.org/deisurvey

SURVEY CATEGORIES

Credit Union Information
Governance & Accountability Practices
Staffing
Training
Development, Retention, & Supplier
Leadership Commitment
Detail on DEI Statements, Tracking, & Goals
Perceived Effectiveness of Practices & Policies

INTRODUCTION

Filene Research Institute is launching year two of our 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.

click here to take the survey
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 and charter number (if known)?

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—implemented in 2021; 2020; 2019; or pre-2019
⦿ No

At my credit union:

We have a definition of diversity, equity and/or inclusion.

We have a statement that describes the value for diversity, equity, and/or inclusion in our credit union.

We include diversity, equity, and inclusion in our credit union’s strategic plan.

We have a written plan that sets the direction for managing diversity, equity, and inclusion to align with our business activities.

We include diversity, equity, and inclusion in managerial performance appraisals or evaluations.

We link diversity, equity, and inclusion goals or metrics to managerial 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.
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.
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.?)
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—implemented in 2021; 2020; 2019; or pre-2019
- No

At my credit union:

We have a section of our website dedicated to DEI.

We use inclusive language in recruiting materials.

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.

For the following questions, 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—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.

At my credit union, we offer DEI training.
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—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

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

On a scale from 0-100, how would you rate the effectiveness of your organization at creating a diverse, equitable, and/or inclusive environment?

On a scale from 0-100, how would you rate the effectiveness of your organization at delivering on the business case for diversity, equity, and/or inclusion?

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 10–12 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?
We will be asking for your email during the survey. Your email, along with 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

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