Diversity Assessment Tool App

Preliminary Results from More Than 200 Small, Medium and Large Enterprises

TED ROGERS SCHOOL OF MANAGEMENT | DIVERSITY INSTITUTE

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The Diversity Institute conducts and coordinates multi-disciplinary, multi-stakeholder research to address the needs of diverse Canadians, the changing nature of skills and competencies, and the policies, processes and tools that advance economic inclusion and success. Our action-oriented, evidence-based approach is advancing knowledge of the complex barriers faced by underrepresented groups, leading practices to effect change, and producing concrete results. The Diversity Institute is a research lead for the Future Skills Centre.

The Future Skills Centre (FSC) is a forward-thinking centre for research and collaboration dedicated to driving innovation in skills development so that everyone in Canada can be prepared for the future of work. We partner with policy makers, researchers, practitioners, employers and labour, and post-secondary institutions to solve pressing labour market challenges and ensure that everyone can benefit from relevant lifelong learning opportunities. We are founded by a consortium whose members are Toronto Metropolitan University, Blueprint, and The Conference Board of Canada, and are funded by the Government of Canada's Future Skills program.

Funder

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Executive Summary

Context

Equity, diversity and inclusion (EDI) are not just ethical and moral imperatives. They offer strategic advantages that can improve business outcomes, driving innovation and employee satisfaction while reducing risks. These benefits are well-documented in research, yet many organizations, especially small and medium-sized enterprises (SMEs), struggle to implement effective and meaningful EDI strategies.

As of December 2022, Canada had 1.22 million employer businesses, with SMEs accounting for 99.7% of them. These SMEs act as a backbone of the Canadian economy, driving economic progress and employment.

Despite this, SMEs face numerous challenges that may hinder their growth and competitiveness, including gaps in hiring and retention practices and professional development opportunities. Strategies around EDI are essential for SMEs to be able to overcome the challenges.

The Diversity Assessment Tool App

The Diversity Institute's Diversity Assessment Tool (DAT) offers SMEs a practical way to assess their EDI practices, policies and strategies and determine areas for improvement.

The DAT was initially developed for address barriers and improve representation for women in the information, communication and technology (ICT) sector. Later refinements used extensive research to extend across other industries, such as financial services and education.

However, the high cost of consultancy projects and administering the DAT created barriers to access for SMEs. As a result, in 2022, the Diversity Institute introduced the DAT App, a free digital tool designed for SMEs to assess their EDI practices and receive tailored recommendations. The DAT continues to evolve with changes to platforms, available languages, accessibility and web design.

The DAT App addresses the core elements of any organization's strategy and can be adapted to most sectors. It has six categories linked to key aspects of corporate strategy, including governance, leadership and strategy; human resources (HR) processes; values and culture; measurement and tracking of EDI; diversity across the value chain; and outreach and expanding the pool.

When using the DAT App, organizations are invited to complete a survey, where they provide information about their EDI practices across six dimensions. Upon completion, they receive a customized report.

When using the DAT App, organizations are invited to complete a survey, where they provide information about their EDI practices across these six dimensions. Upon completion, they receive a customized report with three main components:

> A report with tailored recommendations

> A spidergram, a visualization tool that maps the organization's performance against benchmarks

> Examples of practices to consider.

Methods

The following questions guide this report:

> What are the characteristics of organizations using the DAT App? Are there differences in results among them?

> What is the DAT App's impact on the organizations that use it?

> What are the areas for improvement and modification of the DAT App?

This report uses data from 209 organizations, including 160 SMEs, that completed the DAT App between November 2023 and August 2024. It covers organizational characteristics, such as size, sector, industry and EDI practices, along the six DAT dimensions.

After completing the survey, organizations are invited to provide feedback on the tool's usability and usefulness, as well as submit suggestions for improvement. Due to the small sample size of the feedback survey, only open-ended responses are used to highlight the successes and areas for improvement of the tool.

Findings

Our analysis explores their characteristics (e.g., size, sector, industry) and current EDI practices. We found that organizations using the DAT App have diverse characteristics, operating in different sectors and industries, such as accommodation and food services and health care and social assistance. They span the non-profit, private and public sectors. Most are SMEs (76.6%) with fewer than 500 employees, while almost one-quarter (23%) are larger organizations with 500 employees or more.

A review of these organizations' EDI practices showed a range of practices, demonstrating attempts to consider diversity in all aspects of corporate strategy. However, organizations also showed areas where they could improve, highlighting the DAT App's ability to pinpoint areas for development.

Governance, leadership and strategy

Diverse leadership is crucial for inclusivity. Yet nearly one-half of organizations (48.3%) reported they do not have a strategy to identify and recruit a diverse senior management team. For SMEs, that figure is 54.4%.

Findings also indicate that EDI goals were unevenly integrated into organizational objectives, with more than one-half of organizations (51.2%) aligning some goals with EDI. More than one-quarter (26.3%) have no EDI-related goals.

Human resources processes

Inclusive HR practices are important for fostering a diverse and inclusive workplace. Nearly one-third of organizations (29.2%) do not have formal strategies or make efforts to recruit equity-deserving candidates, with only a small fraction (5.7%) regularly employing comprehensive recruitment strategies. The use of diverse recruitment committees is also limited, with only 3.3% of businesses having formal processes in place to ensure diversity on selection teams. There are also areas for improvement with employee development, as 71.3% of organizations do not have formal mentorship or coaching opportunities.

Values and culture

An inclusive organizational culture includes flexible work arrangements and management of workload expectations. Close to 70% of organizations set clear expectations for workload, reflecting a commitment to employee well-being. Furthermore, 83.7% of organizations offer some type of flexible work arrangement, either with or without management approval.

Measurement and tracking

Setting and tracking EDI goals is essential for accountability and transparency across all organizational functions. Close to two-fifths of organizations (38.8%) did not have explicit EDI targets for diversity on their management teams. More than 60% do not have any key performance indicators related to EDI. Although some set diversity goals, tracking and measuring progress remains a challenge.

Diversity across the value chain

Incorporating EDI into the value chain varies among organizations, with only some considering diversity in product design and marketing. For example, 27.8% of organizations indicated that they embed the experience of diverse users into product design, while a similar proportion (27.3%) are not actively considering diversity in product design.

Outreach and expanding the pool

Engagement with diverse supplier councils and external diversity-focused projects is limited. More than two-thirds of organizations (67.5%) are unaware of the councils, and only 6.7% have utilized them. While our analysis indicates that 29.7% of organizations are engaged in diversity-focused projects with an external partner, 41.1% have external partners but no diversity lens to their projects.

Conclusions

With nearly 400 organizations from various sectors and industries using the DAT App, it has proven to be an invaluable resource for assessing and improving EDI practices, especially for SMEs. As the DAT evolves, the Diversity Institute remains committed to enhancing its functionality, usability and accessibility.

In addition to improving the user experience across the DAT, future plans include:

> exploring advanced technological enhancements for the app, such as optimizing algorithms

> building additional use cases tailored to various industries and sectors (e.g., municipalities)

> creating more tailored best practice kits for organizations would also help advance EDI across the Canadian economy.

Context

Equity, diversity and inclusion (EDI) are not just ethical and moral imperatives. They offer strategic advantages that drive innovation while improving employee satisfaction and business outcomes and reducing risks. Research consistently highlights the benefits of EDI in the workplace, noting far-reaching benefits for supporting diverse employees and improved organizational performance.[1, 2, 3]

**Examples of the benefits of EDI in the workplace:**

> Diverse leadership leads to improved organizational outcomes, such as better business performance,[4] increased productivity[5] and innovation,[6] and higher profits and revenues.[7] Diverse boards are more likely to mitigate financial risk,[8] demonstrate more sustainable performance,[9] and adopt and develop new strategies.[10]

> Diverse and inclusive organizational cultures play an important role in supporting employees. Employees who feel valued, respected and supported typically have higher engagement, belonging and satisfaction, thereby reducing turnover and associated costs.[11, 12]

> Inclusive workplaces not only attract and retain top talent from diverse talent pools, but they also foster a culture of creativity and innovation. These workplaces embrace a range of voices and perspectives, leading to increased innovation and improved business outcomes.[13, 14]

Despite these clear advantages, many organizations struggle to implement effective and meaningful EDI strategies. Organizations have varying access to resources and expertise that can affect the design, creation and implementation of EDI strategies, practices and policies.

This may lead to unequal outcomes in adopting and implementing these strategies. For example, small and medium-sized enterprises (SMEs) may lack human resource (HR) strategies to attract, recruit and retain diverse talent.[15, 16, 17]

Figure 1

Size of employer businesses in Canada in 2022
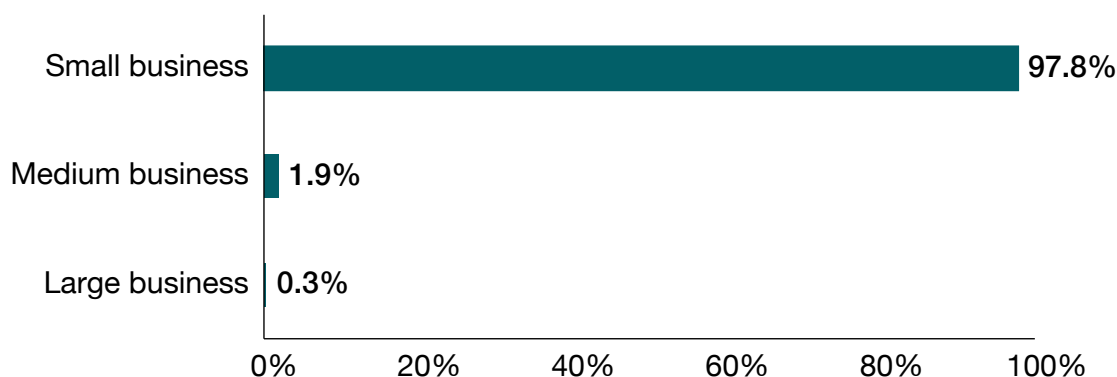
Small and medium-sized enterprises in Canada

The overwhelming majority of Canadian business are SMEs. As of December 2022, Canada had 1.22 million employer businesses. Among these, 97.8% were small businesses with one to 99 employees, 1.9% were medium-sized (100 to 499 employees), and only 0.3% were large (500 employees or more; Figure 1). Micro businesses refer to businesses with fewer than 10 employees.

These SMEs play a pivotal role in the Canadian economy:

> **They create jobs.** In 2022, private-sector organizations employed more than 12 million Canadians, with most (63.8%) working in SMEs.[18]

> **They are significant contributors to the Canadian economy.** Between 2016 and 2020, SMEs accounted for close to one-half (48.2%) of Canada's GDP.[19]

> **They engage in export activities.** In 2022, Canadian SMEs contributed 40.8% (almost $300 billion) of the country's total $718 billion of exported goods.[20]

Workforce challenges

Access to talent remains a significant challenge for SMEs, with many saying the lack of skilled labour threatens their business growth.

A 2020 Ontario Chamber of Commerce report found that 65% of SMEs reported recruiting and training talent as one of the top three factors contributing to organizational competitiveness.[21] Despite this, SMEs consistently experience difficulties recruiting new employees. In the 2020 report, for example, 62% reported difficulties hiring new employees in the last six months.[22] Research confirms these challenges and finds that SMEs view their ability to attract and retain talent as a top issue.[23, 24, 25]

Strategies and measures around EDI are therefore important for SMEs to foster an inclusive workplace, attract diverse talent and remain competitive. However, these businesses often lack dedicated HR professionals and the resources needed to support the recruitment of skilled and diverse workers.

Another considerable challenge for SMEs is offering professional development opportunities, such as training, to retain and upskill existing employees.[26, 27, 28, 29] In a survey of 331 companies in Quebec, 75% of organizations indicated a need to invest in training and retaining their workforce. However, these aspirations do not necessarily translate into action, as less than one-half of these companies reported investing in training opportunities. Organizations cited several reasons for not being able to invest in training, including a lack of time and resources.[30]

With a lack of HR professionals, SMEs often employ informal recruitment processes, which can disadvantage women and other equity-deserving groups.[31] A study based on a survey of 297 companies in Canada found that only some organizations had definitive plans to recruit diverse individuals despite interest in an untapped talent pool.[32] Another study on SMEs in Ontario indicated that SMEs support EDI, but need guidance, resources or expertise to be more inclusive.[33] At the same time, evidence suggests that SMEs who hire immigrants and international students often exhibit more positive attitudes toward immigrants and are more likely to continue hiring them.[34] These findings suggest that SMEs might not know where to start.[35]

A recent study of 331 companies in Quebec revealed that larger organizations were more likely to have implemented EDI measures compared to smaller ones. Micro, small and medium-sized businesses reported high rates of not having concrete plans to establish EDI programs (32%, 35% and 31%, respectively).[36] However, it is important to note that SMEs may encounter financial or time restraints that can limit their ability to develop and implement EDI strategies. For example, EDI practices, such as recruitment strategies and flexible work arrangements, are common in larger organizations but may be more difficult for SMEs to implement due to financial constraints.[37]

The Diversity Institute's Diversity Assessment Tool (DAT) is a practical digital tool that SMEs can use to assess their EDI practices, policies and strategies. It helps them pinpoint successes and areas for improvement in their internal operations and provides tailored best practices from small and large organizations around the globe.

This approach gives SMEs meaningful advice, such as ideas for initiatives to advance EDI, and helps them foster more inclusive organizational cultures that support women and other equity-deserving groups.

The Diversity Assessment Tool

The Diversity Institute launched the Diversity Assessment Tool (DAT) to assess organizations' EDI policies, practices and procedures in response to growing organizational EDI challenges.

The original tool was developed to address barriers and provide strategies to increase the participation of women in the information, communications and technology (ICT) sector.[38] However, it was refined using extensive research in various contexts and across additional sectors, such as financial services, policing, non-profits, education and health care. These results guided the development of the first iteration of the DAT.

However, the cost of administering the DAT was high, with consulting projects ranging from $25,000 to more than $300,000, depending on scale and complexity. This acted as an access barrier for SMEs, which often lack the resources, time and capacity to develop and implement formal EDI strategies. As such, finding a scalable approach was critical.

In 2022, the Diversity Institute made strides in enhancing the accessibility of the DAT by launching the DAT App, a free digital tool specifically tailored for SMEs. The app allows SMEs to assess internal EDI practices and generates a customized report, complete with actionable recommendations for improvement and examples of tailored best practices.

The Diversity Institute launched the DAT to assess organizations' EDI policies, practices and procedures in response to growing organizational EDI challenges.

The Diversity Assessment Tool App Evolution

Since its the launch, the Diversity Assessment Tool (DAT) App has evolved through several iterations, and its features have been customized to cater to the diverse needs of small and medium-sized enterprises (SMEs).

PHASE 1

In 2022, the prototype DAT App was developed on the D2L learning management system (LMS) under the DIGITAL supercluster initiative. This was a collaborative effort with Simon Fraser University's VentureLabs, Magnet, D2L and SalesChoice.[39]

PHASE 2

Given continued access concerns from SMEs, the **DAT App was transitioned to Qualtrics, a survey platform.**

PHASE 3

New versions of the DAT App were developed with support from the Future Skills Centre and Innovation, Science and Economic Development Canada. **This includes a database of best practices, resulting in more tailored EDI solutions for organizations.**

PHASE 4

In 2024, the Diversity Institute developed a French version of the DAT App in collaboration with the University of Montreal. The best practices database was also expanded to consider industry-specific practices, offering more tailored solutions to organizations.

PHASE 5

The Diversity Institute continues to improve the DAT App, including the user experience and works on expanding best practices applicable to organizations. This ongoing commitment ensures that the DAT remains an effective tool for assessing and improving EDI practices for SMEs in Canada.

The Diversity Assessment Tool's six key dimensions of equity, diversity and inclusion (EDI) performance

Governance, leadership and strategy

Human resource processes

Values and culture

Measurement and tracking of EDI

Diversity across the value chain

Outreach and expanding the pool

Core dimensions

The DAT App is grounded in evidence that indicates that EDI strategies are most effective when linked to organizational goals and objectives. The DAT App is designed to address the core elements of any organization's strategy and can be adapted to other sectors.

It has six categories, linked to key aspects of corporate strategy. These include:

> **Governance, leadership and strategy:**

Effective strategies begin by setting the "tone at the top." Diverse representation in leadership, governance and decision-making teams ensures a range of voices and perspectives on strategic issues. It also helps to engage diverse employees and respond to stakeholder expectations.

> **Human resources processes:**

HR practices span the employment life cycle, from designing job roles to recruitment, selection, promotion, retention and separation. Embedding EDI principles in all phases can help foster a diverse workforce, signal an organization's commitment to an inclusive culture, and promote employee satisfaction and retention.[40, 41]

> **Values and culture:**

Organizations with inclusive cultures create environments where equity-deserving employees feel valued, respected and supported. Although this is essential for employees, it also benefits the organization. For example, EDI strategies foster employee performance and loyalty while strengthening an organization's ability to achieve its goals.

> **Measurement and tracking of EDI:**

Metrics are key elements to translating an organization's commitment to EDI into actionable outcomes. Establishing targets and tracking outcomes is a best practice and an important mechanism to advance EDI.[42] One example is the use of surveys to track diverse representation. Sharing these results provides insights into the effectiveness of an organization's EDI strategies.[43]

> **Diversity across the value chain:**

Organizations can embed diversity in their value chain by incorporating EDI practices into business activities, such as procurement, research and development, product design, marketing, communications, and customer service. This practice leads to measurable benefits, such as catering to diverse markets and consumers and mitigating potential risks.44

> **Outreach and expanding the pool:**

This refers to how an organization engages and builds partnerships with stakeholders to advance EDI and drive change. This might include philanthropic activities and corporate social responsibility, as well as partnerships with educational institutions to grow the next generation.

In the DAT App, organizations are asked several questions for each area, providing a comprehensive understanding of their EDI practices, policies and strategies. For example, in the governance, leadership and strategy category, organizations are asked to provide details about diversity on their boards of directors and senior management teams, as well as their policies (if any) to identify, recruit and nominate diverse individuals. Additional details on the questions used in the DAT App can be found in Appendix A.

Report features

Upon completion of the DAT App, organizations receive a report, which includes three main components:

> A report with tailored recommendations

> A spidergram, a visualization tool that maps an organization's performance against benchmarks

> Examples of practices to consider.

The report describes the organization's state of EDI and provides recommendations for improvement, which cover all DAT dimensions and questions. For example, under the value chain category, recommendations cover various organizational activities, such as procurement, product and service development, marketing and client service training.

The spidergram visualizes how an organization performs across all six DAT App dimensions on a scale of one to five, with one being minimal compliance and five being the highest at strategic integration, it is possible to score a zero. This diagram allows organizations to see their performance and areas where they can improve (see Figure 2 for an example).

It is also a valuable tool to track progress over time. Organizations can easily compare two iterations of a spidergram to determine their progress. This is not only useful for internal benchmarking for EDI progress, but it can also be shared with external stakeholders to show progress.

The last component is best practices, which are drawn from organizations across Canada and the globe. The benefit of these recommendations is that SMEs do not need to build their own EDI strategy from scratch or seek resources themselves. The SMEs can instead refer to tailored resources and use or adapt them in their own context.

For example, organizations need to have several policies to support an inclusive culture, such as a workplace health and safety policy, accessibility policy, and code of ethics. However, these may be very time-consuming to develop. The DAT App's tailored best practices can be used as an example for SMEs to build their own policies, saving time and resources.

Figure 2

Sample of spidergram report for the DAT App: Tracking equity, diversity and inclusion
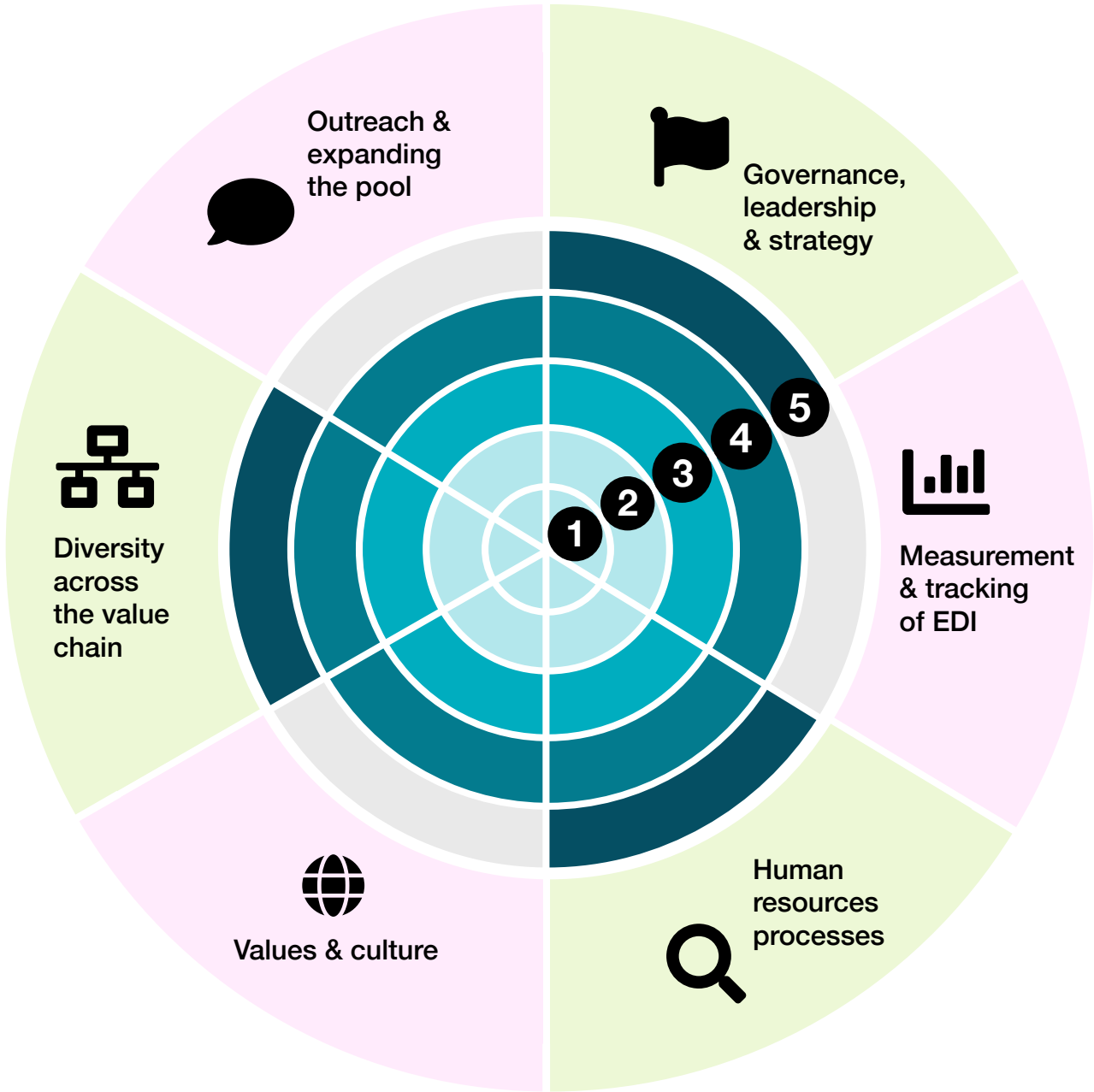
Levels

1 2 Minimal & Regulatory Compliance	**3** Foundational Demonstration	**4** Advanced Implementation	**5** Strategic Integration

Methods

This preliminary evaluation is aimed at assessing the DAT App that was designed for SMEs and is available free of charge on the Diversity Institute's 50 – 30 Challenge website.[i]

Since its launch, the DAT App has been deployed in a variety of contexts with nearly 400 organizations across sectors and sizes. It has been deployed with a range of partners, including the DIGITAL supercluster initiative, D2L, SalesChoice, Simon Fraser University Venture Lab, Ontario Chamber of Commerce, the NGen manufacturing supercluster, the National Research Council of Canada's Industrial Research Assistance Program (IRAP) and others. The app has been translated into French and used by more than 100 companies through a project with the city of Montreal.

This report focuses on organizations that completed the DAT App in Phase 4 of the DAT project, between November 2023 and August 2024. During this time, 209 organizations (including 160 SMEs) completed the survey in English and French. The analysis is focused on a single phase due to limitations, including differences in data collection mechanisms (i.e., LMS versus Qualtrics), response categories and overall data structure.

Evaluation questions

This report aims to answer the following questions:

> What are the characteristics of organizations using the DAT App? Are there differences in results among them?

> What is the impact of the DAT App on the organizations that use it?

> What are areas for improvement and modification of the DAT App?

Data collection

The project received a research ethics board protocol waiver for program evaluation (REB #2021-556), from Toronto Metropolitan University to ensure ethical data collection standards are adhered to. Data collection includes information on the organization's size, structure, location and the nature of its business, as well as its EDI practices along the six DAT dimensions

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i   The DAT App can be accessed through DI's 50 - 30 Tools website.

On completion of the DAT App, users are asked to complete a short survey asking them about their experience and the tool's usefulness in developing EDI strategies. This user experience survey was implemented in 2024. However, due to a small response rate, only open-ended responses were reviewed.

Data analysis

This report provides a preliminary evaluation on DAT App users and their EDI practices. The goal is to understand the characteristics of organizations, the current state of their EDI policies, practices and processes, and their experiences using the tool.

This report provides a preliminary evaluation on DAT App users and their EDI practices. The goal is to understand the characteristics of organizations, the current state of their EDI policies, practices and processes, and their experiences using the tool.

Findings

This section presents an evaluation of DAT App users and their EDI practices. It focuses on organizations that completed the DAT App in Phase 4 from November 2023 to August 2024 and examines their characteristics and EDI practices. A total of 209 responses were analyzed, 160 of which were from SMEs. It is followed by an analysis of the user experience with the DAT App, understanding their experience with usability and applicability.

Organization profiles

Most of the organizations in this analysis are SMEs (76.6%, Figure 3) with fewer than 500 employees. Almost one-quarter are larger organizations, with 500 employees or more (23%).

Figure 3
Size of organizations that completed the DAT App

Category	Percentage
Small (1 to 99)	56.5%
Medium (100 to 499)	20.1%
Large (500+)	23%
Prefer not to answer	0.5%
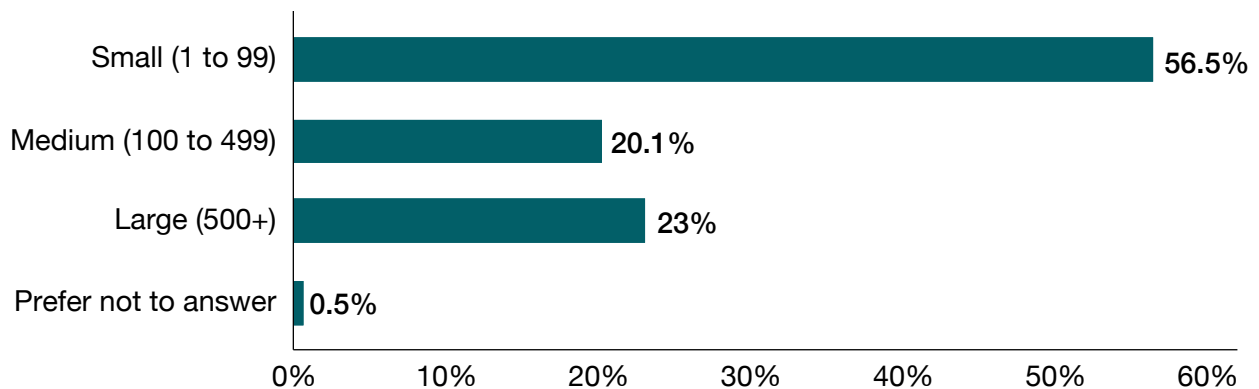
Figure 4

Sector of organizations that completed the DAT App
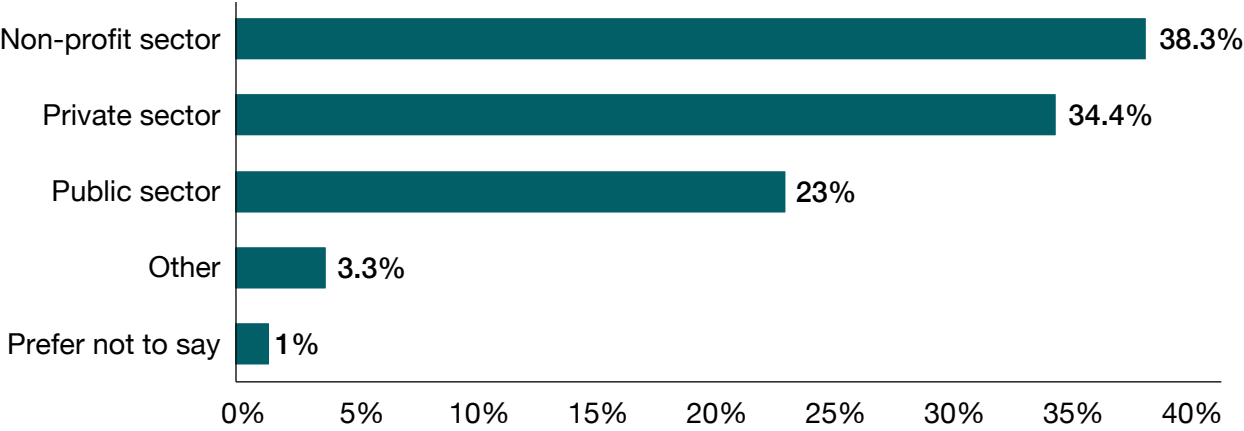
The organizations operate in different sectors and industries. Almost two-fifths (38.3%) indicated operating in the non-profit sector, followed by 34.4% in the private sector and 23% in the public sector (Figure 4). Of the 160 SMEs analyzed, almost one-half (48.1%) operate in the non-profit sector, followed by 38.1% in the private sector and 9.3% in the public sector.

Table 1

Industry of organizations that completed the DAT App

Industry	Number	Percent (%)
Accommodation and food services	2	1
Agriculture, forestry, fishing and hunting	2	1
Arts, entertainment and recreation	18	8.7
Construction	4	1.9
Educational services	18	8.7
Finance and insurance	8	3.8
Health care and social assistance	25	12
Information and cultural industries	4	1.9
Management of companies and enterprises	1	0.5
Manufacturing	10	4.8
Mining, quarrying, and oil and gas extraction	1	0.5
Other services (except public administration)	32	15.4
Prefer not to say	5	2.4
Professional, scientific and technical services	45	21.6
Public administration	23	11.1
Retail trade	4	1.9
Transportation and warehousing	5	2.4
Utilities	1	0.5
Total	**208**	**100**

Note: Total is 100.1% due to rounding.

Organizations operated in various industries, as seen in Table 1. The most common sectors included professional, scientific and technical services (21.9%), other services (15.4%), health care and social assistance (12%), and public administration (11.1%).

Organizations shared a range of experiences with EDI policies, practices and procedures. In this section, we delve into the responses to provide a comprehensive review, while highlighting the challenges and success of SMEs.

Governance, leadership and strategy

Diverse representation in leadership, governance and decision-making teams fosters a range of voices and perspectives on strategic issues and signals inclusivity within an organization. Strategies such as skills matrices can help identify and recruit a diverse board of directors and senior management team.

Almost one-half of organizations indicated that they do not have a strategy to identify and recruit a diverse senior management team (48.3%), suggesting that additional efforts are needed (Figure 5). Less than 10% indicated they have a strategy they are implementing, with only 3.3% reporting it is comprehensive.

Figure 5

Identifying and recruiting a diverse senior management team

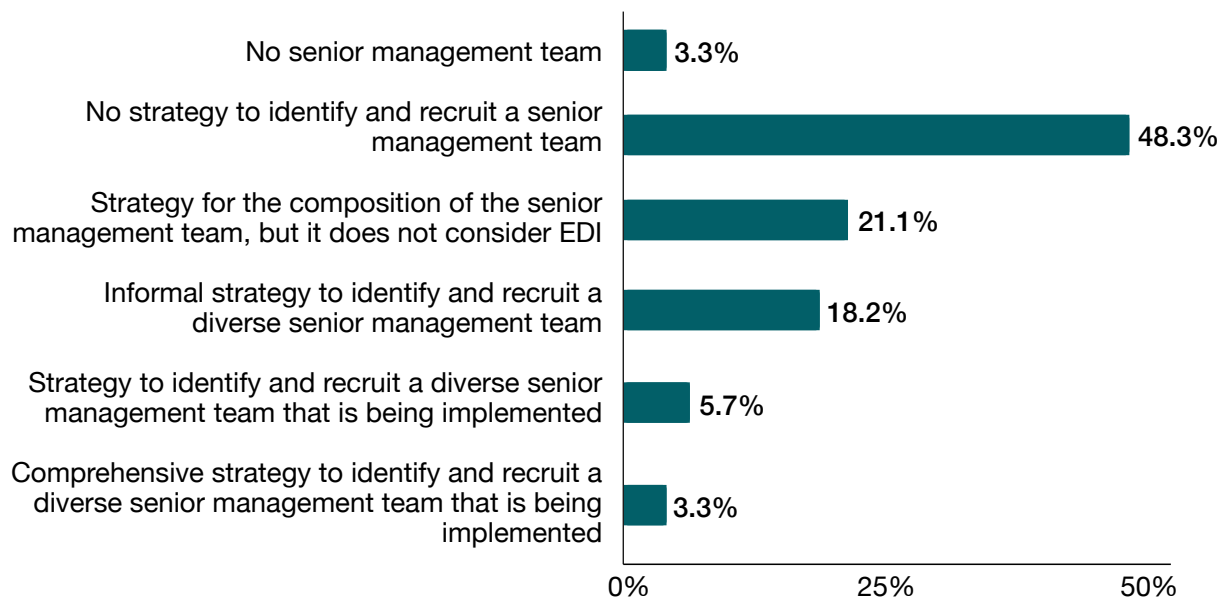| Category	Percentage
No senior management team	3.3%
No strategy to identify and recruit a senior management team	48.3%
Strategy for the composition of the senior management team, but it does not consider EDI	21.1%
Informal strategy to identify and recruit a diverse senior management team	18.2%
Strategy to identify and recruit a diverse senior management team that is being implemented	5.7%
Comprehensive strategy to identify and recruit a diverse senior management team that is being implemented	3.3%

Figure 6

Organizational goals related to equity, diversity and inclusion
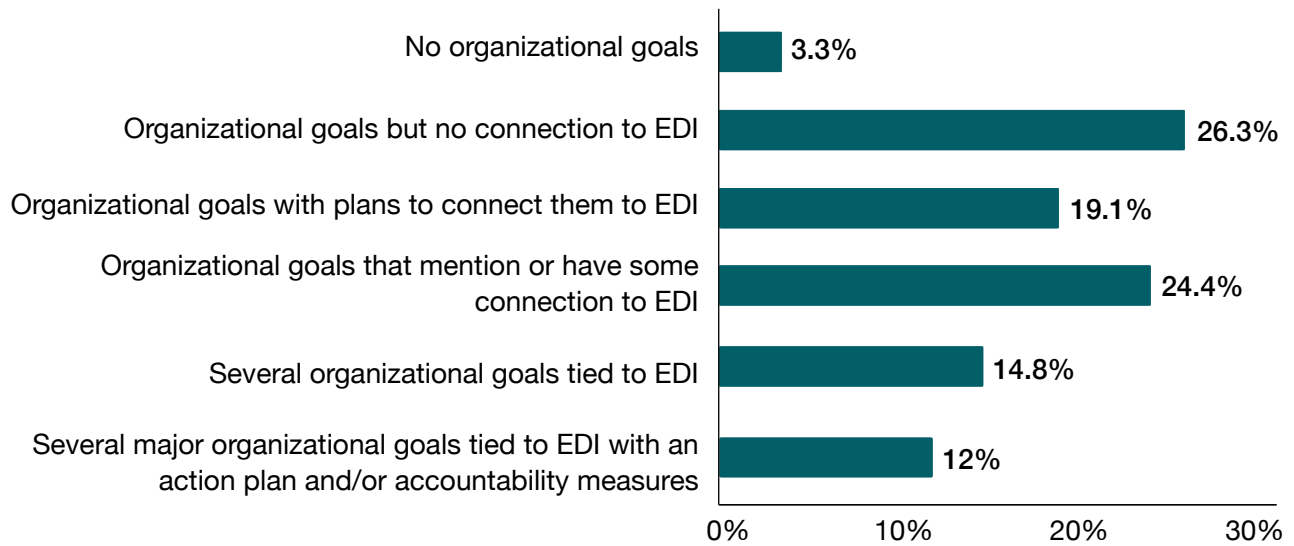
When examining diversity strategies of SMEs, more than one-half said they do not yet have a strategy to nominate and recruit a diverse board (54.4%) and only 2.5% have a comprehensive strategy that they are implementing.

Effective EDI strategies are linked to organizational goals. These goals allow organizations to focus their EDI efforts and make progress on their priorities. For example, goals may include sales, hiring and customer service targets.

Of the 209 DAT completions, respondents shared varying perspectives on whether their goals are tied to EDI (Figure 6). A little more than one-half (51.2%) noted that they have some or several goals tied to EDI, with 12% having an accompanied action plan or accountability measures. More than one-quarter (26.3%) reported that their goals are unrelated to EDI. Of the 160 SMEs surveyed, 45.6% reported having some or several goals connected to EDI.

Human resources processes

Inclusive HR processes are important in creating a diverse and inclusive workplace. For example, intentional recruitment strategies focusing on recruiting equity-deserving people can help foster a diverse workforce and promote inclusivity.

This analysis shows that more than 60% of organizations reported lacking a strategy to recruit equity-deserving candidates (Figure 7). Only 9.1% indicated they have a formal strategy they sometimes use, and 5.7% have a complete, documented strategy that they regularly use.

Figure 7

Recruitment strategy for equity-deserving people

Category	Percentage
Not recruiting anyone	5.3%
No defined strategy to recruit equity-deserving people	29.2%
No defined strategy but efforts are made to recruit equity-deserving people	32.1%
Informal set of procedures that are sometimes used to recruit equity-deserving people	18.7%
Formal strategy to recruit equity-deserving peoples that is sometimes used	9.1%
Complete, documented strategy with defined policies and processes to recruit equity-deserving people	5.7%

Figure 8

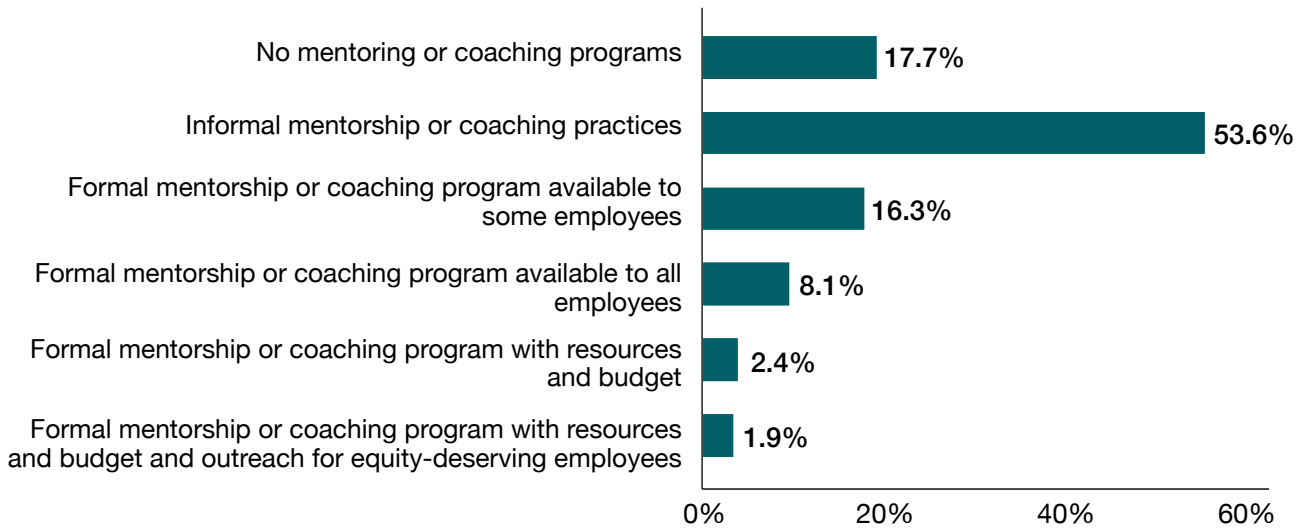Use of diverse selection committees
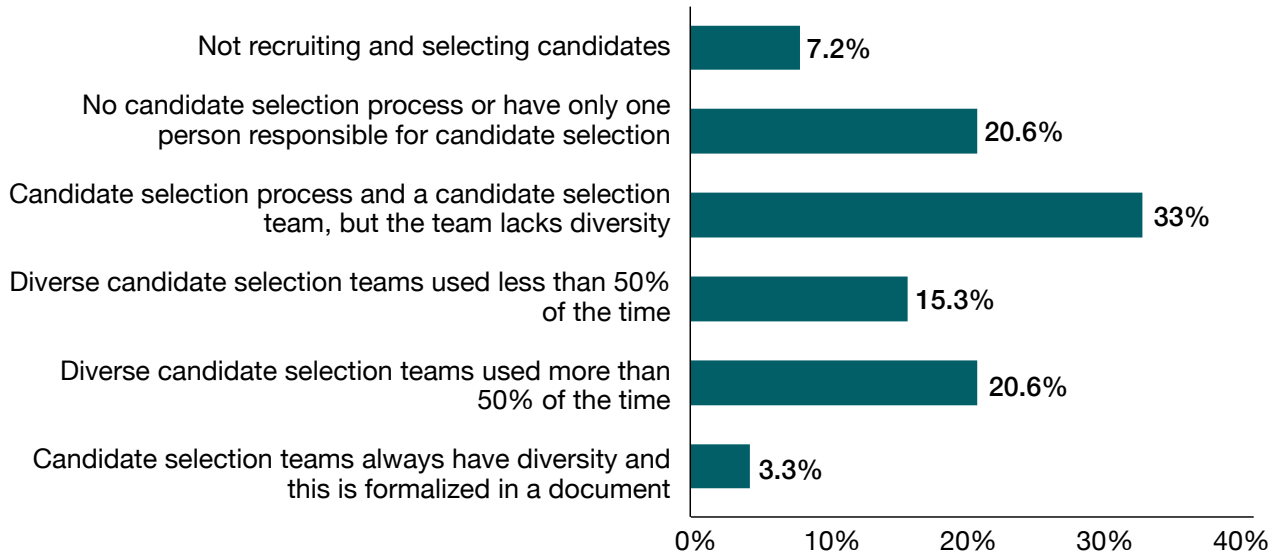
When examining recruitment strategies for SMEs, the analysis found that 30.6% of these businesses do not yet have a strategy to recruit equity-deserving people. In addition, fewer SMEs have formalized strategies than the overall sample. Only 6.9% have a formal strategy they sometimes use, and 5% have a complete, documented strategy that they regularly use. These lower proportions might be explained by SMEs often lacking dedicated HR professionals and the resources needed to recruit diverse talent.

Ensuring an inclusive recruitment process is crucial, and one way to achieve this is by having a diverse selection committee. A diverse committee brings perspectives and experiences that can reduce bias in the selection process.

The analysis shows that about two-fifths of organizations (39.2%) reported using diverse selection teams at least some of the time (Figure 8). However, only 3.3% indicated that they had a formalized policy to ensure diverse representation in all selection committees. About one-third of organizations (33%) noted that their selection process and teams lack diversity. Of the 160 SMEs, 38.1% reported using diverse selection committees at least some of the time, with only 3.8% having this process formalized in a document or policy.

Formal mentorship and coaching programs create opportunities for employees to feel supported and valued, as well as provide opportunities to enhance professional growth and development.

Figure 9

Mentorship and coaching opportunities

Category	Percentage
No mentoring or coaching programs	17.7%
Informal mentorship or coaching practices	53.6%
Formal mentorship or coaching program available to some employees	16.3%
Formal mentorship or coaching program available to all employees	8.1%
Formal mentorship or coaching program with resources and budget	2.4%
Formal mentorship or coaching program with resources and budget and outreach for equity-deserving employees	1.9%

More than one-half of organizations (53.6%) reported encouraging informal mentoring or coaching practices (Figure 9). More than one-quarter of organizations had some kind of formal mentorship program for at least some employees. However, very few of these programs had strong organizational support. For example, only 1.9% have a formal program with a budget and outreach to employees from equity-deserving groups.

When examining professional development opportunities at SMEs, 55% of those surveyed have informal mentoring and coaching programs, while only 2.5% had a formal program targeting employees from equity-deserving groups. Such small proportions are expected. They align with prior research that suggests that SMEs often experience challenges in implementing professional development, such as mentorship and coaching, due to limited time and resources.

Values and culture

An inclusive organizational culture recognizes the value of diverse people and creates an environment where employees feel supported and respected. Some ways to support an inclusive organizational culture is through flexible and family-friendly work arrangements that give employees autonomy and help them manage work responsibilities and personal lives.

In this survey, organizations reported they have varying practices regarding flexible work arrangements. Most organizations offer some kind of flexibility in work arrangements with 34.9% indicating that flexibility is offered with prior approval and 31.1% formalizing their flexible work arrangements in a policy (Figure 10).

Figure 10
Flexible work arrangements

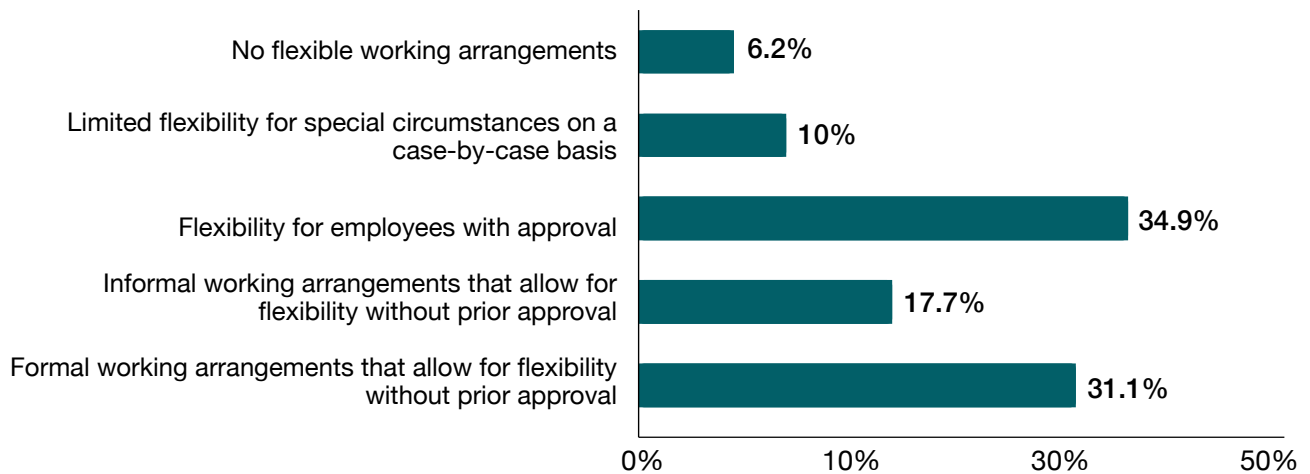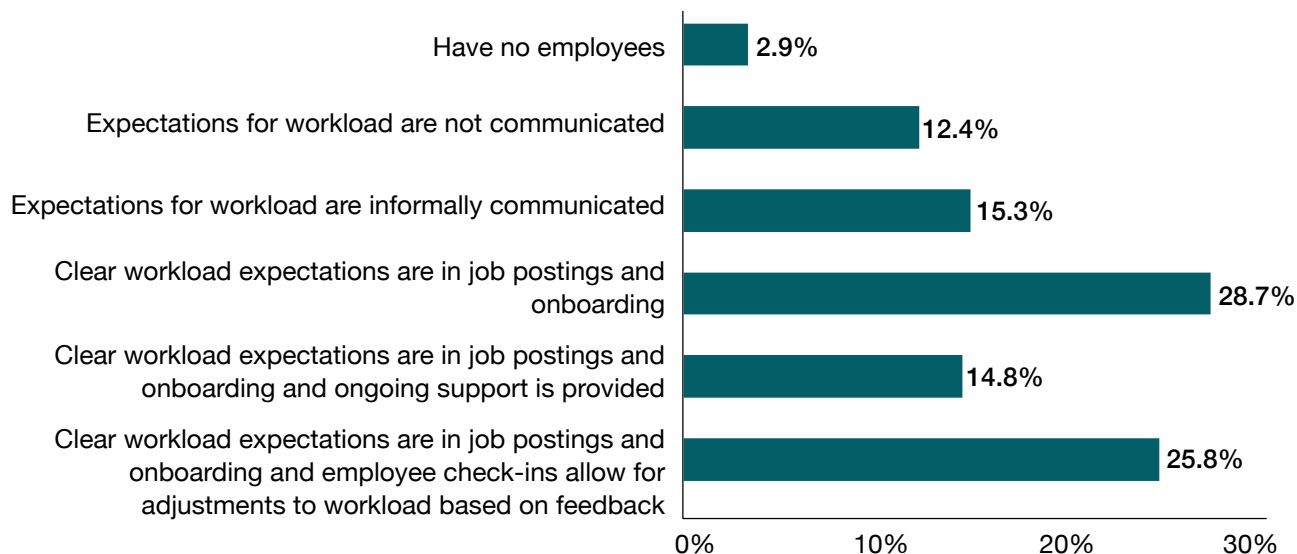| Category	Percentage
No flexible working arrangements	6.2%
Limited flexibility for special circumstances on a case-by-case basis	10%
Flexibility for employees with approval	34.9%
Informal working arrangements that allow for flexibility without prior approval	17.7%
Formal working arrangements that allow for flexibility without prior approval	31.1%

Figure 11

Workload communication

Managing workload expectations not only helps employees feel supported but also improves mental health, engagement and retention.

The analysis found that close to 70% of organizations indicated that they set clear expectations for workload, with 25.8% noting workload expectations in job postings and employee check-ins, and importantly, adjusting based on employee feedback (Figure 11). This active involvement of employees in the process empowers them and strengthens their organizational commitment. Fewer organizations (12.4%) did not communicate expectations about workload.

Figure 12

Access to mental health benefits and counselling
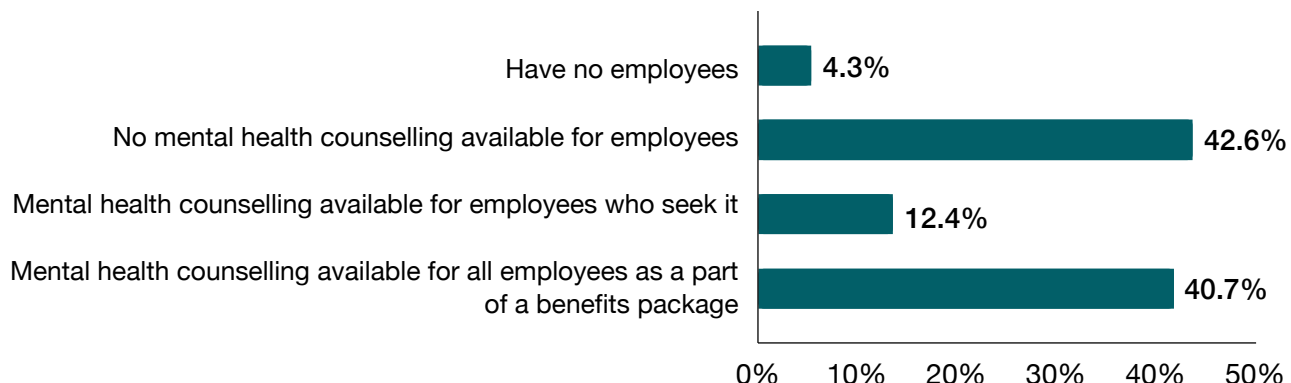
When examining responses for SMEs only, the analysis shows that almost three-quarters (73.1%) set clear expectations for employee workload, with 29.4% noting workload expectations in job postings and employee check-ins.

Organizations can also support employees and increase retention by offering mental health counselling as part of their benefits package. The analysis found split perspectives here, with 42.6% of organizations providing no mental health benefits and 40.7% offering them as part of their benefits package (Figure 12). Of the 160 SMEs surveyed, almost one-half (46.3%) indicated providing mental health benefits, highlighting their commitment to employee well-being.

Measurement and tracking of equity, diversity and inclusion

What gets measured gets done. Setting targets and measuring progress promotes accountability and transparency across all organizational functions. Organizations can measure and track outcomes of policies, programs and initiatives to ensure their commitment to EDI is translated into action. For example, representation matters at all levels of the organization: at the top (including the board of directors), in entry-level roles and everywhere in between.

Setting targets is the first step, and this may include for the board of directors or senior manager opportunities.

The analysis shows mixed organizational practices in setting explicit diversity goals, indicating a potential area for improvement for organizations to track and monitor their EDI progress. Close to two-fifths of organizations (38.8%) indicated they have no explicit goals or targets but may have informal discussions about improving diversity in management (Figure 13). Almost 44% have set diversity goals for management, with 22% having targets for equity-deserving people in these roles and a plan to reach these targets.

Figure 13

Setting organizational diversity goals for management

Category	Percentage
Have no employees	17.7%
No explicit diversity goals for management, but may have informal discussions	38.8%
Goals for increasing representation of equity-deserving groups in management	21.5%
Goals for increasing representation of equity-deserving groups in management and action plans to realize targets	22%
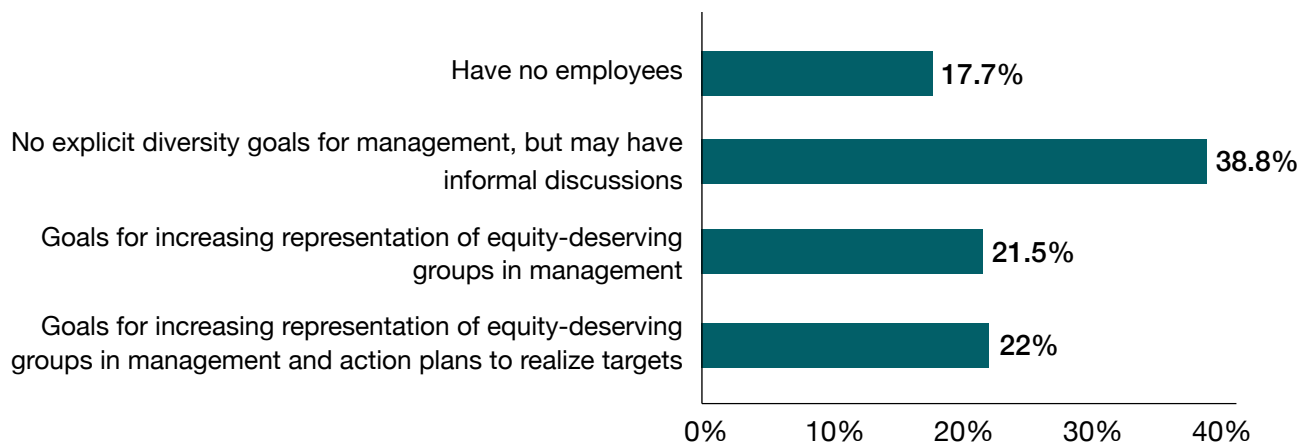
Figure 14

Setting organizational key performance indicators

Category	Value
Do not yet have KPIs	28.2%
No KPIs related to EDI	34.4%
At least one KPI related to EDI	10.5%
KPIs related to EDI but without metrics and/or targets	12.4%
KPIs related to EDI with metrics and/or targets	12.4%
KPIs related to EDI with metrics and/or targets tied to employee performance and rewards	1.9%
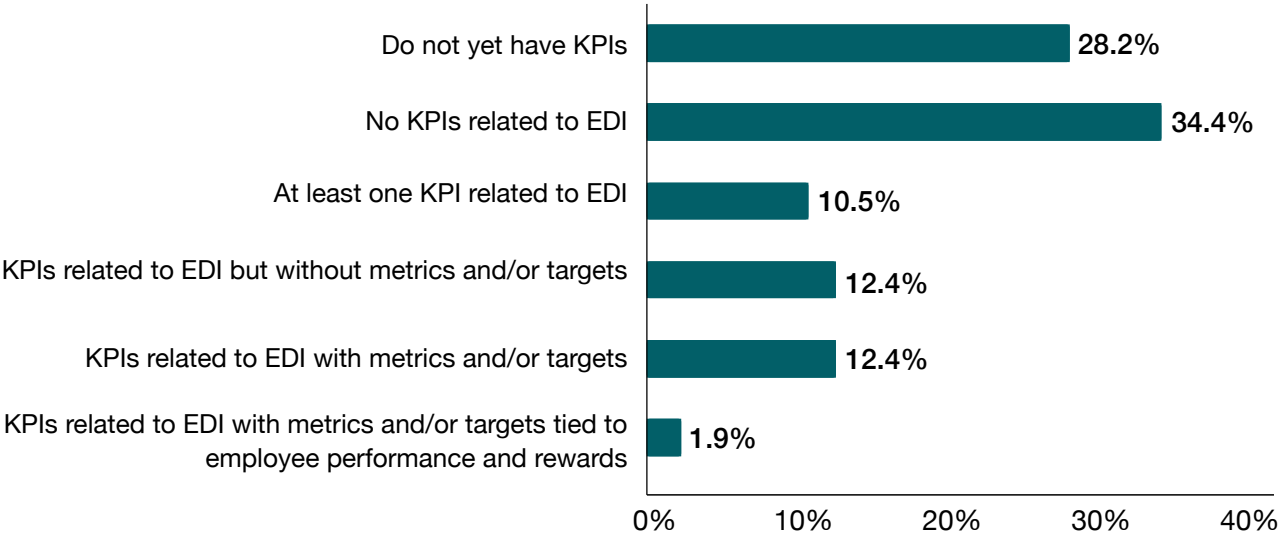
Key performance indicators (KPIs) are a mechanism to measure activities and provide an overview of how organizations are performing. By applying an EDI lens to these indicators, organizations can monitor their progress at several stages, including the value chain, procurement, customer service and corporate social responsibility.

In the survey, most organizations indicated that they either do not have any KPIs (28.2%) or have KPIs but none related to EDI (34.4%). Few organizations reported KPIs with EDI metrics that are tied to employee performance (1.9%; Figure 14).

Diversity across the value chain

Organizations can embed EDI into their value chain, including procurement, research and development, product and service design and delivery, and marketing and communications. Applying an EDI lens ensures that these practices consider perspectives from diverse audiences, users and consumers. For example, considering diversity in product design and development reduces flaws and biases in products, ensuring they are usable by diverse communities.

Respondents had varying perspectives on their practices to incorporate diversity in product design (Figure 15). More than one-quarter (27.8%) of organizations noted that they embed the experience of diverse users into product design. A similar proportion (27.3%) do not actively consider diversity in product design.

Figure 15

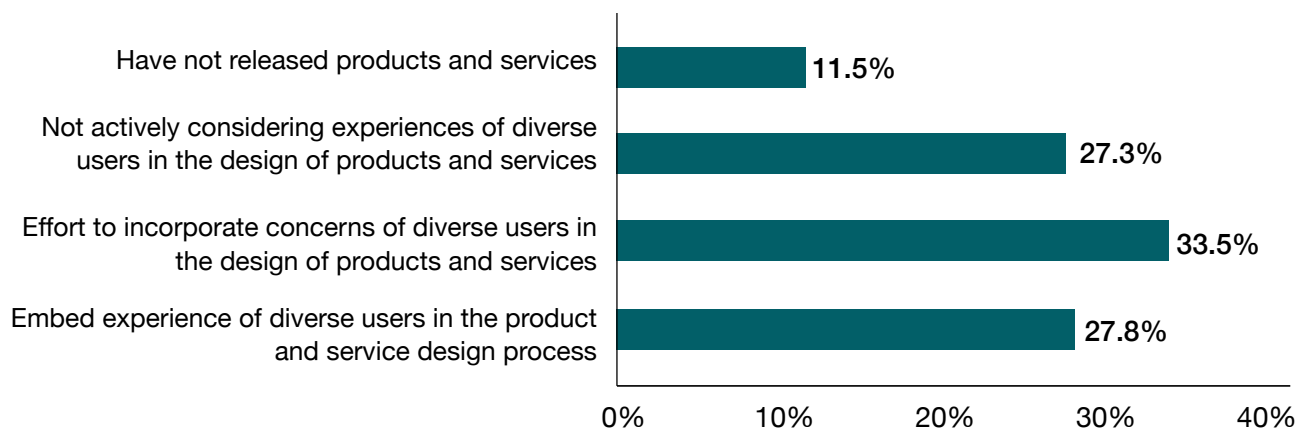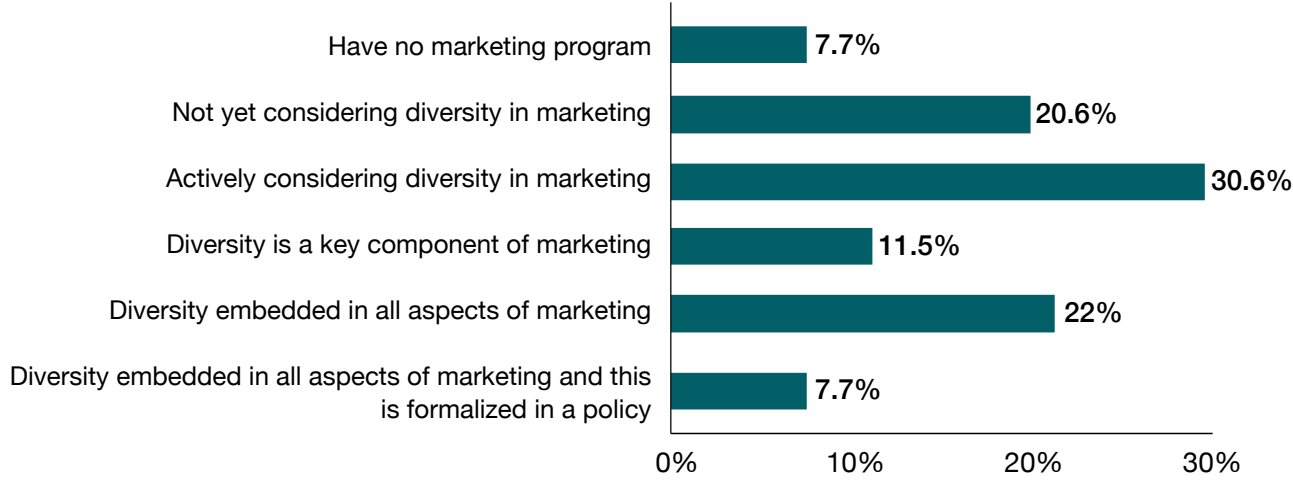**Diversity in product and service design**

Figure 16

Incorporating diversity into marketing materials

Category	Value
Have no marketing program	7.7%
Not yet considering diversity in marketing	20.6%
Actively considering diversity in marketing	30.6%
Diversity is a key component of marketing	11.5%
Diversity embedded in all aspects of marketing	22%
Diversity embedded in all aspects of marketing and this is formalized in a policy	7.7%

0%   10%   20%   30%

Marketing materials reflect an organization's values, playing a crucial role in shaping its public image. By incorporating EDI, organizations can ensure the materials resonate with a diverse audience, thereby enhancing brand perception.

More than two-fifths of organizations (41.1%) recognized diversity as a key element of their marketing programs, with 7.7% having a formal policy committing to diversity in all aspects of marketing (Figure 16). However, it is worth noting that about one-fifth (20.6%) of organizations said they do not yet consider diversity in their marketing program, indicating a potential area for growth and improvement.

Outreach and expanding the pool

This category refers to how organizations build partnerships with the community and other stakeholders to advance EDI. For example, organizations may participate in corporate social responsibility partnerships with educational institutions to develop the next generation of workers. They may also engage with diverse supplier councils to purchase goods and services from diverse organizations.

The surveyed organizations' engagement with diverse supplier councils highlights a considerable EDI gap. Most (67.5%) reported being unaware of diverse supplier councils (Figure 17). This lack of awareness may contribute to the limited engagement observed, with only a small fraction of organizations having communicated with (12%) or used (6.7%) diverse supplier councils.

Figure 17

Engaging with diverse suppliers

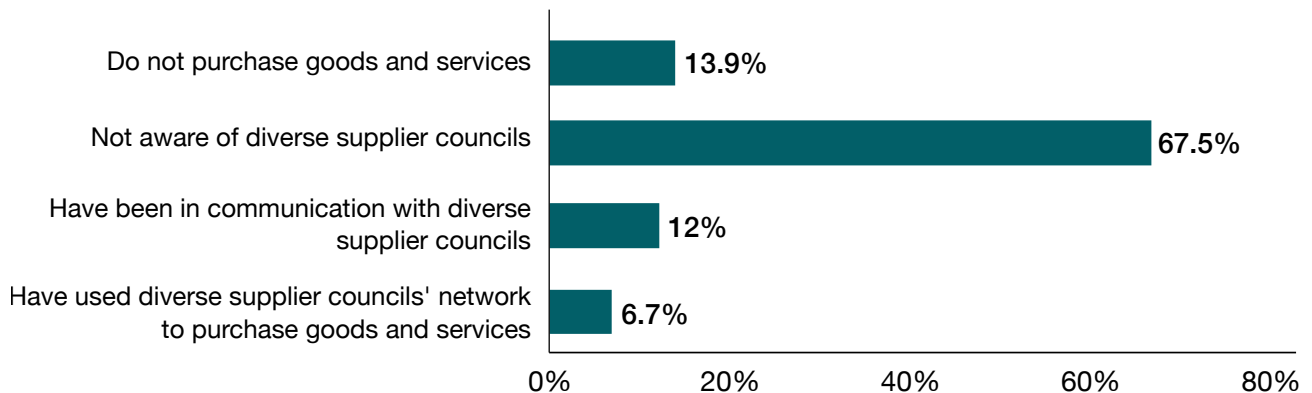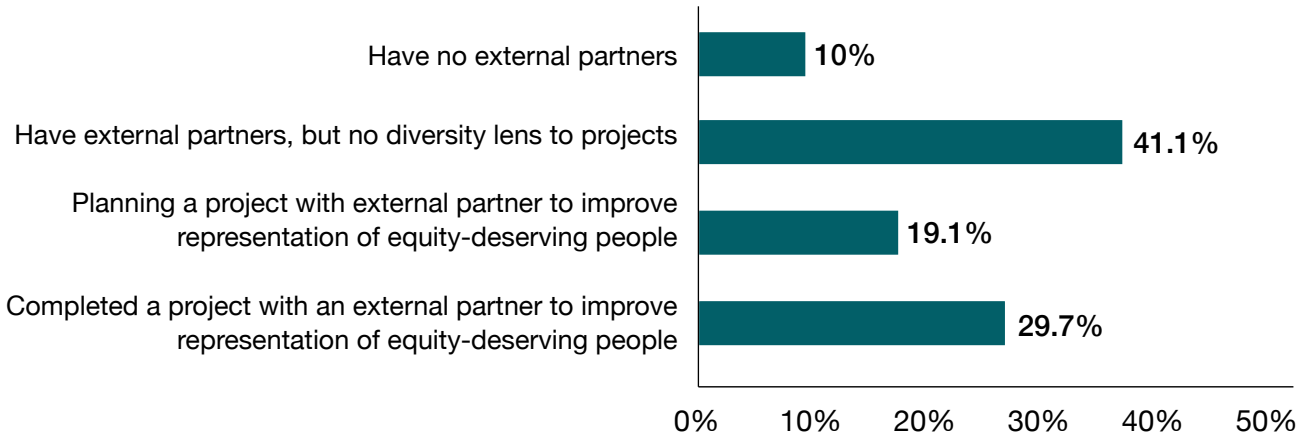| Category	Percentage
Do not purchase goods and services	13.9%
Not aware of diverse supplier councils	67.5%
Have been in communication with diverse supplier councils	12%
Have used diverse supplier councils' network to purchase goods and services	6.7%

Figure 18

Projects to improve representation of equity-deserving people in the sector

When examining SME activities with diverse suppliers, the analysis found that 70% of SMEs were unaware of these organizations, and only 4.4% have used these suppliers to purchase goods.

Organizations also engage in projects to help improve representation of equity-deserving groups in the sectors. The analysis indicates that some organizations are already engaged in (29.7%) or planning to engage (19.1%) in diversity-focused projects with an external partner (Figure 18).

However, more than two-fifths (41.1%) have external partners but don't incorporate a diversity lens into their projects. This presents a unique opportunity for these organizations to strategically enhance their diversity and inclusion efforts, an important step in addressing sector and industry representation issues.

Table 2

Overall scores of DAT App completions

	Governance, Leadership and Strategy	Human Resource Processes	Values and Culture	Measurement and Tracking EDI	Diversity Across the Value Chain	Outreach and Expanding the Pool
No EDI Efforts	0	8	2	11	6	8
Minimal Compliance (1)	38	16	11	37	43	49
Regulatory Compliance (2)	118	78	71	56	49	64
Foundational Demonstration (3)	49	84	91	65	79	53
Advanced Implementation (4)	2	23	31	36	30	28
Strategic Integration (5)	2	0	3	4	2	7
Weighted Average	**2.1**	**2.5**	**2.7**	**2.7**	**2.4**	**2.3**

Note: the values represent the number of companies who perform at each level of compliance.

Best and worst performing areas

The organizations analyzed have implemented various EDI policies, practices and strategies into their operations. This highlights their commitment to embedding EDI across their corporate strategies.

Table 2 examines the implementations across the DAT App dimensions of governance, leadership and strategy, HR practices, values and culture, measurement and tracking of EDI, the value chain, and efforts in community outreach.

On average, organizations are performing between a score of two and three on EDI compliance, ranging from regulatory compliance to foundational demonstration. A level one or two represents minimal or regulatory EDI compliance, whereas a level five indicates a strategic integration of EDI principles in that dimension.

The highest-performing DAT dimensions were values and culture, and measurement and tracking of EDI. Figure 14 highlights how these organizations are advancing their commitment toward creating an inclusive culture with actionable metrics.

Figure 19

Spidergram analysis of organizations surveyed

Levels

1 Minimal & Regulatory **2** Compliance	**3** Foundational Demonstration	**4** Advanced Implementation	**5** Strategic Integration
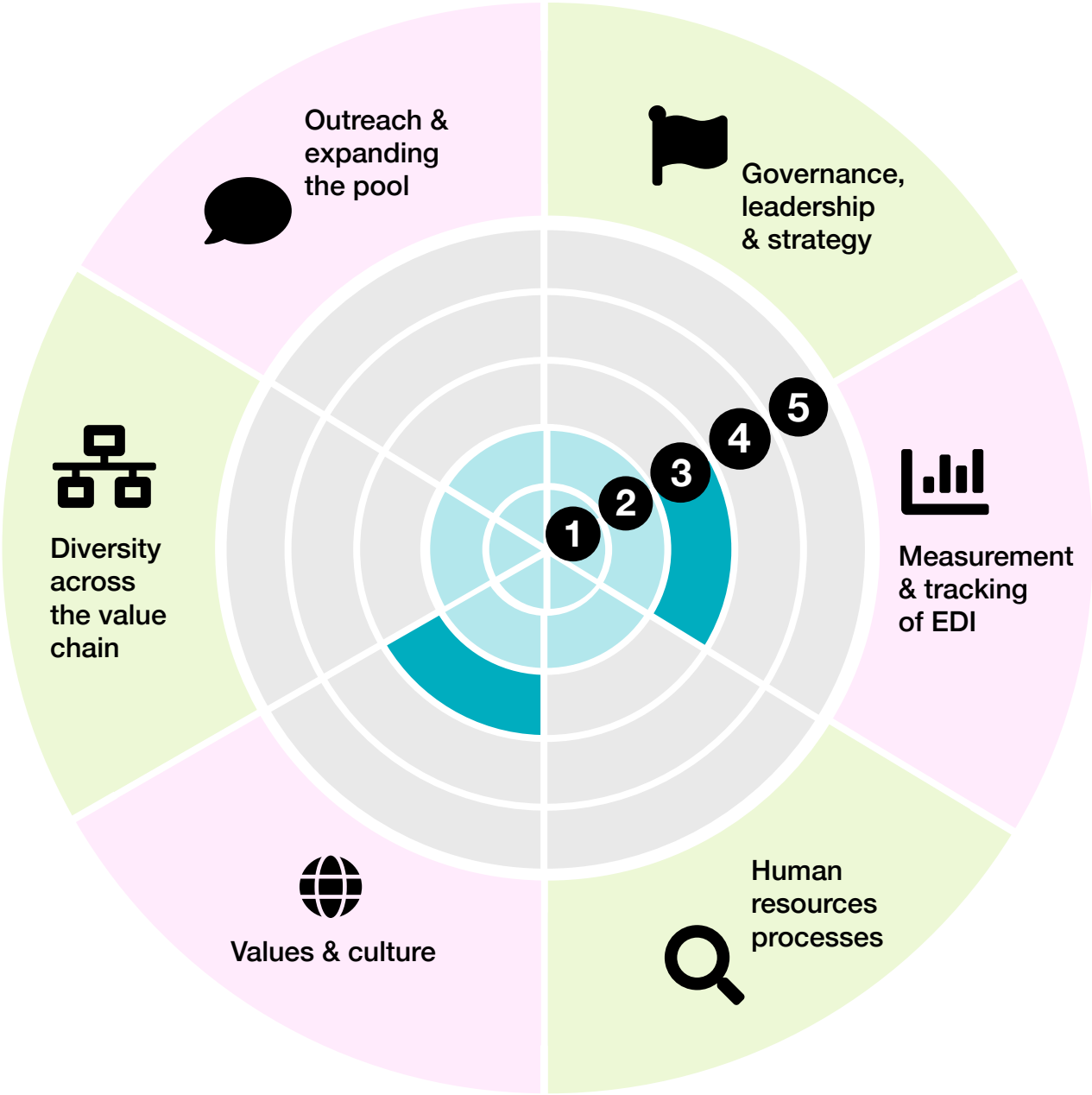
DAT App user experience

Organizations provided open-ended feedback on their experiences with the DAT App. One user indicated that "The DAT App was user-friendly and gave a quick snapshot on the areas I need to focus on." However, they sought more quantifiable actions to ensure effective organizational action.

Large and small organizations alike felt the tool was useful overall. However, the options presented may sometimes be too restrictive or not indicative of all organizational structures. For example, one representative of an SME noted "The tool is suitable for SMEs and perhaps less instinctive for large institutions where the hierarchy of the decision-making chain involves several levels of responsibility." Some larger organizations felt the same way, with one making the recommendation to "adapt the tool for large companies so that they don't have to have an action plan for each division."

Conclusion: Next Steps for the DAT App

The Diversity Institute launched the DAT in response to organizations' growing challenges in implementing effective EDI corporate strategies. Initially developed for the ICT sector to increase women's participation, the DAT was refined for other sectors and industries.

However, the high cost of administering the DAT posed an access barrier for SMEs. In response, a free digital version, the DAT App, was introduced in 2022 to assess internal EDI practices and provide customized reports with tailored best practices. Several improvements have been made, including developing a French version and incorporating industry-specific best practices.

This evaluation of the DAT App provides an overview of EDI practices for 209 organizations, 160 of which are SMEs. We identified several key areas for improvement in organizations' EDI practices.

Specifically, areas of improvement included:

> Almost one-half of organizations did not have a strategy to identify and recruit a diverse senior management team.

> More than 60% of organizations lacked a strategy to identify and recruit diverse groups. Moreover, due to limited time and resources, SMEs often experience challenges in implementing professional development opportunities for employees, such as mentorship and coaching.

> Gaps remain in measuring and tracking EDI, as many organizations either lack EDI-related KPIs or have no KPIs at all. Close to two-fifths of organizations had no explicit EDI goals or targets for diversity in management.

> A considerable EDI gap exists regarding diverse supplier councils. More than two-thirds of organizations are unaware of their existence, underscoring the need for targeted EDI strategies.

*Since its launch, **more than 400 organizations** across sectors and industries have used the DAT App. It has demonstrated tremendous value as a **critical resource for assessing and improving EDI practices.***

While our evaluation identifies significant EDI gaps, there have also been notable successes, including:

> Close to 70% of organizations set clear expectations for workload, reflecting a commitment to employee well-being.

> Flexible work arrangements were common, with 83.7% of organizations offering flexibility with or without prior approval.

> Nearly one-half of SMEs provide mental health benefits.

Since its launch, more than 400 organizations across sectors and industries have used the DAT App. It has demonstrated tremendous value as a critical resource for assessing and improving EDI practices.

As the tool continues to evolve, the Diversity Institute remains committed to further improving its functionality, usability and accessibility. The next steps will focus on refining the user experience; exploring advanced technological enhancements for the DAT App, such as optimizing algorithms; and building additional use cases tailored for municipalities, nonprofits, health care and other specific sectors, such as ICT, manufacturing and others, and create more tailored best practice kits for organizations.

Appendix: Diversity Assessment Tool App Survey Questions

Table A1

Diversity Assessment Tool Survey Questions

Question #	Question
	Governance, Leadership and Strategy
DAT Q 1	What types of diversity are represented in the organization's board of directors, to your knowledge?
DAT Q 2	Does the organization have a strategy to identify, recruit and nominate diverse board members, including women and/or non-binary people, Indigenous Peoples, persons living with disabilities, racialized people, and those identifying as 2SLGBTQ+?
DAT Q 3	Does the organization have a board policy stating that the organization will identify and nominate women and diverse candidates including Indigenous Peoples, persons living with disabilities, racialized people and those identifying as 2SLGBTQ+?
DAT Q 4	Are there term and tenure limits to renew the composition of the board of directors?
DAT Q 5	What types of diversity are represented in the organization's senior management team, to your knowledge?
DAT Q 6	Does the organization have a strategy and skills matrix to identify and recruit a diverse senior management team, including women and/or non-binary people, Indigenous Peoples, persons living with disabilities, racialized people, and those identifying as 2SLGBTQ+?
DAT Q 7	Do board members and senior leaders proactively communicate the importance of diversity?
DAT Q 8	Is there a diversity and inclusion committee or a senior leader (someone with organizational authority) responsible for advancing EDI?
DAT Q 9	If you have organizational goals, are they tied to equity, diversity and inclusion? (Organizational goals can include sales targets, hiring targets, improving customer service, etc.)?
DAT Q 10	If your organization has a mission, vision and/or purpose statement, does that statement include equity, diversity and inclusion themes?
DAT Q 11	Does your organization understand and communicate the value of equity, diversity and inclusion for organizational performance?

Question #	Question
	Human Resources Processes
DAT Q 12	Does the organization have a strategy to recruit under-represented peoples?
DAT Q 13	Do job postings encourage members of under-represented groups to apply?
DAT Q 14	Do job postings provide a statement of reasonable accommodation? A statement of reasonable accommodation expresses an organization's commitment to non-discriminatory employment for persons living with disabilities and informs applicants that they may request reasonable accommodations in the job application or hiring process.
DAT Q 15	Does the organization review job postings to ensure that the required qualifications fit the demands of the job?
DAT Q 16	Are job postings formally reviewed using external guides and/or tools to ensure that the language is inclusive for diverse and under-represented groups?
DAT Q 17	Do you have standardized pay levels based on skills and experience and are these available to candidates in the hiring process?
DAT Q 18	During the candidate selection process, is there diversity in the selection committee?
DAT Q 19	Does the interview process to hire new employees include any steps to avoid bias?
DAT Q 20	Do the people with decision-making powers in candidate selection and recruitment receive equity, diversity and inclusion training?
DAT Q 21	Do all employees receive training on equity, diversity and inclusion?
DAT Q 22	Do all managers and leaders receive training on equity, diversity and inclusion?
DAT Q 23	Are there performance evaluation systems?
DAT Q 24	Are opportunities for promotion clearly described and shared with all employees?
DAT Q 25	Does your organization have career planning systems in place for all employees?
DAT Q 26	Which of the following best describes mentorship and coaching opportunities in your organization?
DAT Q 27	Are there professional developmental opportunities for high-potential employees in the organization?
DAT Q 28	Are gender and diversity considerations included in exit and/or separation interviews?
	Values and Culture
DAT Q 29	Does the organization have an equity, diversity, and inclusion policy?
DAT Q 30	Does the organization have a harassment and abuse prevention policy?
DAT Q 31	Does the organization have a workplace safety policy?
DAT Q 32	Does the organization have a code of conduct and ethics policy?
DAT Q 33	Does the organization have an accessibility policy?
DAT Q 34	Does the organization provide a "safe space" free of discrimination for diverse peoples?
DAT Q 35	Are there employee resource groups or other networks to support women and diverse groups?

Question #	Question
DAT Q 36	Are diverse needs considered when planning social events and celebrations (e.g., consider religion, ethnicity and culture when planning food, music, holiday celebrations, etc.)?
DAT Q 37	Does the organization provide flexible working arrangements, such as working from home or flexible hours?
DAT Q 38	Does the organization allow for family-friendly working arrangements? (For example, extended parental leave, family emergency days, elder care, etc.)
DAT Q 39	Are expectations of employee workloads communicated to the employee?
DAT Q 40	Do employees have access to mental health counselling to help manage stress?
Measurement and Tracking of Equity, Diversity and Inclusion	
DAT Q 41	Are there anonymous employee engagement surveys?
DAT Q 42	Is your organization aware of the sensitivities involved with collecting self-reported demographic data in employee engagement surveys?
DAT Q 43	Are there explicit diversity goals for employees from under-represented groups in management positions?
DAT Q 44	Are there key performance indicators (KPIs) directly related to equity, diversity and inclusion?
DAT Q 45	Are equal pay audits conducted to ensure equal pay for work of equal value?
Diversity Across the Value Chain	
DAT Q 46	Is diversity considered in purchasing decisions? (e.g., supplier diversity programs)
DAT Q 47	Are diverse audiences included in research and development of products and services?
DAT Q 48	Is diversity considered in the design of products and services?
DAT Q 49	Is accessibility considered in the design of products and services?
DAT Q 50	Does the organization incorporate the principles of equity, diversity and inclusion in its marketing programs including messages, images and channels?
DAT Q 51	Does the organization ensure that stereotypes about diverse groups are not included in marketing and communications materials?
DAT Q 52	Does the organization profile under-represented people to highlight their skills, achievements and contributions?
DAT Q 53	Do customer/client service personnel receive training to respond to diverse customer/client needs (e.g., people with living disabilities)?
Outreach and Expanding the Pool	
DAT Q 54	Is the organization connected to diverse supplier councils for purchasing decisions (e.g., Canadian Aboriginal and Minority Supplier Council)?
DAT Q 55	Has diversity and inclusion been considered for outreach, assessment and selection of external partners?
DAT Q 56	With external partners, does the organization work on projects to improve representation of under-represented people in the sector?
DAT Q 57	Do the organization's communications materials express its commitment to diversity and inclusion to key stakeholders (e.g., suppliers, clients, partners, educational institutions)?

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