PRELIMINARY EDI TEAM ASSESSMENT GUIDE

For each question, rate your team on a scale from 1 to 5 based on the descriptions below:

1 - Not at all: There is little to no evidence of this within the team.
2 - Rarely: This occurs infrequently, and when it does, it is not consistent.
3 - Sometimes: This happens occasionally, but improvement is needed for it to be reliable.
4 - Often: This is common practice for most team members.
5 - Always: This is consistently true across the team, without exception.

Domain 1: Knowledge and Know-How

The goal here is to assess how familiar the team is with EDI concepts, whether they've been introduced to them, and their overall understanding.

	1	2	3	4	5
Have most team members participated in any formal EDI-related training?	1	2	3	4	5
Do team members generally understand key EDI concepts such as equity, inclusion, and anti-racism?	1	2	3	4	5
Have team members demonstrated applying EDI principles in their daily work?	1	2	3	4	5

Connect2Knowledge

Domain 2: Level of Buy-In

We're assessing whether there's enthusiasm or general agreement about the importance of EDI within the team.

Are there any informal champions for EDI within the team, even if they aren't officially leading efforts?	1	2	3	4	5
Is there general agreement among the team that EDI work is important for the organization's success?	1	2	3	4	5
Does the team view EDI work as an opportunity to strengthen the organization, or is there resistance?	1	2	3	4	5

Domain 3: Trust and Psychological Safety

This domain focuses on whether team members feel safe engaging in challenging conversations and trust each other to do this work together.

Do team members feel comfortable sharing differing views in meetings?	1	2	3	4	5
Are disagreements handled respectfully, with everyone feeling heard and valued?	1	2	3	4	5
When problems arise, do team members work together to find solutions, trusting that others are acting in good faith?	1	2	3	4	5

Overall Scoring Guide
- 35-45: Your team is well-prepared for EDI capacity-building initiatives. You can begin addressing specific EDI goals and challenges. Start by deciding if you want to build their EDI to apply to their work or build their capacity to drive meaningful change.
- 25-34: Your team is on the right path but may need additional work in one or two domains. Consider foundational training or a facilitated session to build trust and buy-in before moving on to more comprehensive capacity-building initiatives.
- Below 25: Your team requires foundational work in EDI knowledge, buy-in, and trust. Start with an introductory training that is high-level and very accessible, followed by a facilitated session to build foundational dynamics before moving on to more complex initiatives.