

# Diversity Self-Assessment Template Instructions

Last Updated: March 5, 2020

## Data Values

Year values should be reported in the yyyy format. Date values should be reported in the mm/dd/yyyy format. Dollar values should be reported to the nearest dollar (e.g., \$1). Percentage values should be reported in the xx.xx format. Phone number values should be reported in the (xxx) xxx-xxxx format.

## Cover Page

**Use of Data and Declaration of Confidentiality** - Please select Yes or No on the drop list.

## Section I. Bank Information

**Bank Name** is the legal title of the bank.

**Period Covered by the Assessment** is the calendar year of the assessment.

**Date Submitted** is the date of the Diversity Self-Assessment template submission.

**Charter** is the bank’s charter number.

**Address** of the bank.

**Diversity and Inclusion Officer or Equivalent** is the name (last name, first name) of the Diversity and Inclusion Officer or equivalent, e-mail address, position title, and phone information.

**Supplier Diversity Officer or Equivalent** is the name (last name, first name) of the Supplier Diversity Officer or equivalent, e-mail address, position title, and phone information.

**Diversity and Inclusion Website** is the hyperlink of the bank’s Diversity and Inclusion website.

**Brief Description of Bank Covered by this Assessment** is the description of bank’s governance structure, total assets, workforce size, and community characteristics.

## Section II. Assessment of the Bank’s Diversity Policies and Practices

### (1) Organizational Commitment to Diversity and Inclusion

- a. Please select Yes or No on the drop list.
- b. Please describe the program successes and challenges.

### (2) Workforce Profile and Employment Practices

- a. Please select Yes or No on the drop list.
- b. Please describe the program successes and challenges.

### (3) Procurement and Business Practices—Supplier Diversity

- a. Please select Yes or No on the drop list.
- b. Please describe the program successes and challenges.

**(4) Practices to Promote Transparency of Bank’s Diversity and Inclusion**

- a. Please select Yes or No on the drop list.
- b. Please describe the program successes and challenges.

**(5) Banks’ Self-Assessment**

- a. Please describe the bank’s current practices for each standard below.

## Section III. Diversity Data

### Workforce Profile

**Total Workforce #** is the bank’s total workforce population as of the end of the calendar year.

**Total Management #** is the total population in the bank’s Executive/Senior Level Officials and Managers job category as of the end of the calendar year.

**Total Board Members #** is the total population on the bank’s board of directors as of the end of the calendar year.

**Women #** is the total population of women in the respective category of workforce, management, and board of directors as of the end of the calendar year.

**Women %** is the percentage of women in the respective category of workforce, management, and board of directors as of the end of the calendar year. For example, if total women in the workforce is 600, and the total workforce population is 2,500, women are 24.00 percent of the workforce population.

**Minorities #** is the total population of minorities in the respective category of workforce, management, and board of directors as of the end of the calendar year.

**Minorities %** is the percentage of minorities in the respective category of workforce, management, and board of directors as of the end of the calendar year. For example, if total minorities in the workforce is 400, and total workforce population of 2,500, minorities are 16.00 percent of the workforce population.

### Procurement—Supplier Diversity

**Total Spend \$** is the bank’s total procurement spend during the calendar year.

**Women-Owned Spend \$** is the bank’s total procurement spend to all women-owned businesses during the calendar year.

**Women-Owned Spend %** is the percentage of total procurement spend to all women-owned

businesses for the calendar year. For example, if the total spend to women-owned businesses is \$15,656, and total procurement spend is \$146,769, women-owned spend percentage is 10.67.

**Minority-Owned Spend \$** is the bank's total procurement spend to all minority-owned businesses during the calendar year.

**Minority-Owned Spend %** is the percentage of total procurement spend to all minority-owned businesses for the calendar year. For example, if the total spend of minority-owned business is \$45,612, and total procurement spend is \$146,769, minority-owned spend percentage is 31.08.

**Minority Women-Owned Spend \$** is the bank's total procurement spend to minority women-owned businesses during the calendar year.

**Minority Women-Owned Spend %** is the percentage of total procurement spend to minority women-owned businesses for the calendar year. For example, if the total spend of minority-owned business is \$30,000, and total procurement spend is \$146,769, minority women-owned spend percentage is 20.44.

## Section IV. Additional Information

Add any additional narrative about the bank's diversity policies and practices not included in the previous sections. The Diversity Self-Assessment template will not accept attachment of files. If the bank would like to submit a copy of its own assessment tool or any supporting documents, please upload this information to the *"Diversity Self Assessment Other Supporting Documents"* folder through BankNet Large File Transfer tool.