


POLICY REVIEW RUBRIC

edfuel
TALENT AS A CATALYST FOR CHANGE

LAST UPDATED: NOVEMBER 2021



	UNACCEPTABLE (1): As written, this policy has potential to do harm within the organization.	ACCEPTABLE (2): As written, this policy serves its basic purpose and is unlikely to produce negative ramifications.	STRONG (3): As written, the policy is likely to benefit to the organization.	EXCELLENT (4): As written, this policy is likely to provide a strong benefit to the organization.
Clarity: Are the steps, processes, and terminology clear?	<ul style="list-style-type: none"> Steps/processes/provisions are poorly defined, confusing, and/or it is unclear how the steps/process/provisions produce the desired outcome Organizational acronyms or jargon are used without being clearly defined and/or terminology is present that could be easily misconstrued 	<ul style="list-style-type: none"> Most steps/processes/provisions are clearly defined and do not result in confusion, though there may be some holes in how the process is executed from beginning to end or in what the provisions account for Most terminology is clear 	<ul style="list-style-type: none"> Steps/processes/provisions are written clearly and there are no holes in the process from beginning to end or in what provisions account for; can be implemented with fidelity Policy may include a visual representation of the steps/process involved Terminology is clear 	<ul style="list-style-type: none"> Steps/processes/provisions are written such that no verbal explanation is necessary for policies to be implemented with fidelity; every possible variation of the process/provisions has been accounted for in the written language to ensure that there are no holes Where possible/applicable, policies include a visual representation to quickly clarify steps/processes involved Includes definitions for any terminology that could be misconstrued
Scope: Who does the policy apply to and in what circumstances?	<ul style="list-style-type: none"> Policy language creates confusion around who the policy applies to or in which circumstances it is used OR language suggests that the policy is applied inconsistently 	<ul style="list-style-type: none"> Policy includes language to clarify which employees this policy pertains to and which it does not Policy language states that there may be exceptions to this policy, but it does not name the circumstances which could warrant an exception 	<ul style="list-style-type: none"> Policy includes language to clarify which employees this policy pertains to, and if not all employees, the relevant policy for those employees is named Policy language specifically notes the circumstances in which exceptions to the policy could be granted 	<ul style="list-style-type: none"> Policy includes language to clarify which employees this policy pertains to, and if not all employees, the relevant policy for those employees is named Policy language specifically notes the circumstances in which exceptions to the policy could be granted and the process by which exceptions are reviewed/approved
Alignment: Is the policy connected to a greater purpose, including the organizational values and culture?	<ul style="list-style-type: none"> Policy includes no connection to organizational values or culture or actively opposes the culture the organization is trying to create amongst employees It is unclear why there is a need for this policy 	<ul style="list-style-type: none"> Policy makes brief or vague reference to an organizational value(s) Faithful implementation of this policy would not detract from the culture the organization hopes to create amongst employees The reason for this policy could likely be assumed correctly, but it is not explicitly named 	<ul style="list-style-type: none"> Policy includes language to reflect the organizational value(s) in which the policy is grounded Faithful implementation of this policy would uphold the culture the organization hopes to create amongst employees Objective/benefit of the policy to the organization/its employees is named 	<ul style="list-style-type: none"> Policy includes language to reflect the aspirational values the organization is hoping to achieve through this policy Faithful implementation of this policy would improve organizational culture Objective/benefit of the policy to the organization and its employees is named, and this is also grounded in organizational values or culture
Antiracist: Does this policy promote increased power and well-being of people of color within the organization?	<ul style="list-style-type: none"> Policy actively diminishes the power and/or well-being of people of color within the organization Policy includes language that is pejorative to people of color No people of color were involved in the creation or review of the policy 	<ul style="list-style-type: none"> Policy does not seek to diminish the power or well-being of people of color within the organization, but it does not seek to expand these, either Policy may include language that unintentionally reinforces systems of racist oppression (e.g. the "achievement" gap) People of color were included in the group that created or reviewed this policy, and their voices are represented in the final language. Policy may prioritize other organizational needs/preferences (speed of the process, financial savings) over antiracism 	<ul style="list-style-type: none"> Policy seeks to positively impact the well-being of people of color within the organization and does not diminish their power Policy includes no language that could reinforce systems of racist oppression (e.g. the "achievement" gap) Multiple people of color were included in the group that created or reviewed the policy, and their voices are represented in the final language. If applicable, policy acknowledges any tensions between antiracism and other organizational needs/preferences (speed of process, financial savings), and how the organization will attempt to balance these 	<ul style="list-style-type: none"> Policy seeks to expand the power and well-being of people of color within the organization and those impacted by its work, and is mindful of the intersectionality among categories of historically oppressed people Policy includes no language that could reinforce systems of racist oppression (e.g. the "achievement" gap), and actively names why new/better terminology is used Multiple people of color, from multiple purviews within the organization (by tenure, seniority, etc.) were included in the stakeholder group that created or reviewed the policy, and their voices are represented in the final language Antiracism is prioritized over other other organizational preferences/needs (e.g. the speed of the process, financial savings), and it is explicitly named how this will live out in the policy's implementation

	UNACCEPTABLE (1): As written, this policy has potential to do harm within the organization.	ACCEPTABLE (2): As written, this policy serves its basic purpose and is unlikely to produce negative ramifications.	STRONG (3): As written, the policy is likely to benefit to the organization.	EXCELLENT (4): As written, this policy is likely to provide a strong benefit to the organization.
Diversity, Equity and Inclusion: Does this policy contribute to a more equitable and inclusive workplace for employees?	<ul style="list-style-type: none"> • There is no organizational commitment to DEI expressed in the policy • Policy prioritizes the needs/desires of certain staff members unfairly over others • The policy makes no reference to and does not include equity checks • No historically marginalized people (e.g. women, LGBTQ) were involved in the creation or review of the policy • There were no efforts to engage a diverse set of voices in the creation of this policy 	<ul style="list-style-type: none"> • Language briefly or vaguely references an organizational commitment to DEI • Policy attempts to be fair to all employees • The policy may make a reference to checking for equity somewhere in the steps/process, but does not specify how that would happen • For every historically marginalized group that is represented within the organization (e.g. women, LGBTQ), at least one member of that group was involved in the creation/review of the policy, and those voices are represented in the final language. • Some additional diverse perspectives (by tenure, seniority, team, parental/caregiver status, etc.) were gathered in the creation or review of this policy, and those voices are represented in the final language. 	<ul style="list-style-type: none"> • Language includes an explicit organizational commitment to DEI • Policy reflects that each employee has inherent value as an employee of the organization • The steps/process involved include at least one equity check/reflection • For every historically marginalized group that is represented within the organization (e.g. women, LGBTQ), multiple representatives of that group were involved in the creation/review of the policy, and their voices are represented in the final language. • A diverse group of stakeholders (by tenure, seniority, team, parental/caregiver status, etc.) were included in the creation or review of this policy, and their voices are represented in the final language. 	<ul style="list-style-type: none"> • Language includes an explicit organizational commitment to DEI, which includes channels for all employees to bring up concerns on these topics without the possibility of retaliation • Policy reflects that each employee has inherent value as a person and as an employee • The steps/process involved include multiple equity checks/reflections • For every historically marginalized group that is represented within the organization (e.g. women, LGBTQ), multiple representatives of that group, from multiple purviews within the organization (by tenure, seniority, team, etc.) were involved in the creation/review of the policy, and their voices are represented in the final language • A diverse group of stakeholders (by tenure, seniority, team, parental/caregiver status, etc.) were deeply engaged in the creation or review of this policy, and their voices are represented in the final language.
Review: Has this policy gone through the proper reviews within the appropriate timeframe?	<ul style="list-style-type: none"> • Policy has not been revisited within the last five years • Policy has not been reviewed by a legal team • Policy is in violation of state or national employment statutes • Policy is not rooted in research or goes against what the research says 	<ul style="list-style-type: none"> • Policy has been reviewed within the last five years to ensure alignment with organizational size, workflows, and management structures. • Policy has been reviewed by a legal team within the last two years • Policy reflects all applicable state and national employment statutes • Policy has some grounding in research, but it may be incomplete or outdated 	<ul style="list-style-type: none"> • Policy has been reviewed within the last two years to ensure alignment with organizational size, workflows, and management structures. • Policy has been reviewed by legal counsel within the past year • Policy reflects all applicable state and national employment statutes • Policy was created or revised based on internal and external research from within the past two years 	<ul style="list-style-type: none"> • Policy was written or revisited within the last year to ensure alignment with organizational size, workflows, and management structures. • Policy has been reviewed by legal counsel at least yearly, and also at the close of any legislative sessions that may impact the policy • Policy reflects all applicable state and national employment statutes • Policy was created or revised based on internal and external research, from a variety of sources with diverse perspectives, from within the past year

Notes on Diversity, Equity, Inclusion and Antiracism: Per the Civil Rights Act, your organization should not take actions that result in any group having advantages in the workplace. However, a long history of discriminatory policies and practices in our country has resulted in many groups - people of color, women, LGBTQ, and people with disabilities among them - having diminished power at work. As such, we recommend that your policies endeavor to right this balance, with the goal of equity for all people in your workplace.

As your organization seeks to make your policies anti-racist, equitable, and inclusive for your employees, there may be inherent challenges to gathering diverse perspectives. Where possible, it is important to seek the perspectives of your employees who represent historically marginalized groups, and it is also important that these employees do not feel that the weight of getting this policy right is on them - nor should anyone feel compelled to engage in this process simply because of their demographics, sexual orientation, etc. If your organization employs only a small number of people who represent specific historically marginalized groups, seeking input from outside your organization can be another valuable exercise to ensure that you are accounting for diverse perspectives.



LEGAL DISCLAIMER

The information contained in this document is provided for informational purposes only, and should not be construed as legal advice on any subject matter and should not be acted on as such, and is subject to change without notice. No information contained herein shall be construed so as to create a contractual or attorney-client relationship.