



clearwater
CREDIT UNION

Diversity, Equity, & Inclusion Plan

[CLEARWATERCREDITUNION.ORG](https://clearwatercreditunion.org)

Organizational Statement on Commitment to Diversity, Equity, and Inclusion

At Clearwater, diversity, equity, and inclusion inform our core values. We understand these things as a moral imperative. And we understand that they will help us to generate better ideas to solve the complex problems of a changing world. We know we have a lot to learn and a lot of work to do. And, not least, we recognize that our own industry – banking – has been complicit in institutionalizing racism during our own lifetimes.

What do we mean when we say “diversity, equity, and inclusion.”

- We understand **diversity** to mean the representation of the varied identities and differences of our membership and the communities we serve – in terms of race, ethnicity, gender, disability, sexual orientation, gender identity, national origin, tribe, socio-economic status, etc. When generating new ideas or problem solving, we should proactively engage, understand, and draw on a variety of perspectives.
- We understand **equity** to mean ensuring fair treatment, equality of opportunity, and fairness in access to information and resources for our co-workers and our members.
- We believe **inclusion** to mean building a culture of belonging. We should actively invite the contribution and participation of all people. We build from respect and dignity. We believe every person’s voice adds value.

Responsibility for Plan

One of our core-values at Clearwater is *Together We Include*. All co-workers and volunteers are expected to support the organization’s work around diversity, equity, and inclusion. This plan was initiated by the Credit Union’s Board and CEO, and was created by a group of co-workers, volunteers, and members. The plan has been reviewed and endorsed by the Board of Directors. The SVP of People Solutions is responsible for implementing the plan. Any questions regarding the plan should be directed to him at Robert.Farmer@clearwatercreditunion.org or 406-523-3387.

Communicating the Plan

This DEI plan will be made available to all co-workers, as well as members and the community at-large. Co-workers are encouraged to ask questions and engage in conversation with leadership about DEI issues. Questions from members and the community are welcomed as well.

This document uses the terms DEI plan and affirmative action plan. While they both work together, there is a difference. Affirmative action plans are focused on changing the demographics inside of an organization. Whereas a DEI Plan is focused on changing an organization’s culture by influencing and changing policies, procedures, and practices.



DEI Objectives and Goals

Objective 1: Workforce Representation

Goals	Action Items	Metrics
1) Increase co-worker demographic data	<ul style="list-style-type: none"> • Conduct co-worker demographic survey to collect diversity data beyond EEOC requirements • Include department and demographic data in Rate of Turnover report • Conduct co-worker skills inventory to build a skill bank to help provide better service to members • Complete annual EEOC reporting 	<ul style="list-style-type: none"> • Demographic survey completed and shared with co-workers • Measure Turnover report includes rate of turnover by demographics and department • Skills inventory created and accessed by staff • EEOC reporting completed by deadline
2) Increase workforce representation in underrepresented areas	<ul style="list-style-type: none"> • Workforce represents all of Montana’s diversity, with a focus on Native American representation and women in senior leadership roles • Create an Affirmative Action Plan 	<ul style="list-style-type: none"> • AAP is created and made available • Placement and training goals established as result of AAP • Placement goals and workforce representation evaluated, and progress measured

Objective 2: Internal Practices and Culture

Goals	Action Items	Metrics
1) Evaluate recruitment and hiring practices	<ul style="list-style-type: none"> • Evaluate process from start to finish and identify areas for changes • Identify new areas to advertise jobs to increase unrepresented populations • Create internship program to support Montana University system BIPOC Students and refugees 	<ul style="list-style-type: none"> • Areas for changes identified and changes are implemented • Two to three new sources used to find talent (job boards, job fairs, etc.) • Internship program created and first intern in place
2) Identify and correct internal practices, language, and policies in order to further promote DEI	<ul style="list-style-type: none"> • Create an internal diversity taskforce to identify and share ideas for changes for policies and procedures 	<ul style="list-style-type: none"> • Diversity taskforce created • Process in place for co-workers to share ideas • Ideas that can be implemented are implemented
3) Build DEI into committee and project work	<ul style="list-style-type: none"> • Committees and project teams ask if they have the right voices at the table, and if not, adjust who is serving on the team or committee 	<ul style="list-style-type: none"> • Committee and project teams are diverse and representative of all co-workers



DEI Objectives and Goals *Continued...*

Objective 3: Co-worker Development

Goals	Action Items	Metrics
1) Increase co-worker knowledge around DEI issues	<ul style="list-style-type: none"> • Conduct implicit bias training for all co-workers • Managers and supervisors attend diversity, equity, and inclusion training for leaders • Make DEI resources available (books, videos, stories, etc.) • Clearwater highlights and shares with staff how the organization is supporting DEI in our community and through our products and services • Adjust performance appraisals to include a DEI metric 	<ul style="list-style-type: none"> • All co-workers have attended training • Additional DEI resources are purchased and made available to co-workers • Co-workers have an understanding of how Clearwater supports DEI in the communities we serve and can speak to it • Co-workers are given feedback in their performance appraisal on how their behavior contributes to an inclusive environment
2) Career advancement and leadership opportunities are inclusive, with a focus on getting underrepresented groups into leadership roles	<ul style="list-style-type: none"> • All identified roles in succession plan include at least one potential successor from an underrepresented group if possible • All Executive Team vacancies are filled with an internal/external search • All non-Executive Team Management or Supervisor vacancies are posted internally at a minimum and not appointed (CEO and SVP of People Solution can make an exception if needed) • Add a performance metric for those in leadership positions focused on their effort to advance the talent pipeline for leadership roles 	<ul style="list-style-type: none"> • Future leaders from underrepresented groups are identified, and a development plan has been created and incorporated into Clearwater's Succession Plan • A national search is conducted for Executive Team vacancies • All non-Executive Team Management or Supervisor vacancies are posted internally. • Supervisors and Managers are provided feedback in their annual appraisal regarding their work to advance the talent pipeline

Objective 4: Member and Community Focus

Goals	Action Items	Metrics
1) Build and strengthen relationships with community partners that share our commitment to DEI	<ul style="list-style-type: none"> • Use our voice and various platforms to further mission and work of our community partners 	<ul style="list-style-type: none"> • Board and CEO have decided on how and when Clearwater supports (social media posts, website, etc.) local initiatives and programs that support DEI
2) Increase member demographic data	<ul style="list-style-type: none"> • Assess what member demographic data we already have access to • Develop ways to collect additional member demographic data • Determine who in our communities could be better served by us • Determine who in our communities is not being served by us at all and could be 	<ul style="list-style-type: none"> • Demographic collection methods are in place • Clearwater has a clear picture of what demographics are represented in the communities we serve • Racial, gender, wealth and other gaps are identified • Advisory groups of those not being served by Clearwater are created and used to help develop products and services to meet financial needs
3) Increase DEI in external marketing and storytelling	<ul style="list-style-type: none"> • Create marketing materials that are reflective of our membership and are inclusive of all in the communities we serve 	<ul style="list-style-type: none"> • Member advisory group created to review and provide feedback on membership reach, storytelling, and product development. • Marketing materials reflect all walks of life and are inclusive



Reporting

Clearwater Credit Union is committed to being as transparent as possible. An annual progress report will be developed and shared with the Board of Directors. It will also be shared with co-workers, members, and the community. This report will also include our Annual Compensation report. Demographic data will be shared when appropriate.

