Certified Diversity Executive (CDE)®

CANDIDATE HANDBOOK

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INTRODUCTION AND OVERVIEW

Program Overview

The field of Diversity, Equity and Inclusion (DEI) is becoming more competitive because it is a part of a multibillion-dollar industry resulting from recent demographic trends, globalization, and compliance requirements. There are thousands of diversity officers and consultants, as well as human resource professionals who are charged with implementing DEI initiatives around the world. Today it is critically important to stand out as a knowledgeable and well-qualified diversity practitioner. This is where the Institute for Diversity Certification (IDC) helps individuals demonstrate excellence and maintain a step above the rest. Candidates earn Certified Diversity Professional (CDP)® or Certified Diversity Executive (CDE)® credentials by meeting program requirements, as well as passing a rigorous standardized exam and a peer evaluation.

IDC’s credentialing process assesses both knowledge (through the online test) and skill (through the peer review of a professional work, also known as a Candidate Project). Candidates who earn the designations are recognized as elite players in the field of diversity and are distinguished from DEI practitioners who lack the knowledge and performance indicators that the CDP® and CDE® programs feature.

About the Certified Diversity Executive (CDE)®

A Certified Diversity Executive (CDE)® is a knowledgeable and skilled senior executive who manages or oversees large scale and/or complex Diversity, Equity, and Inclusion efforts at a college or university, business, government agency, non-governmental organization (NGO), or other institution. A CDE® strategically positions an organization to remove systemic barriers to equity, align enterprise-wide strategies for inclusion, lead culture change, and transform the brand. The CDE® may also apply advanced DEI insights to industry trends, stakeholder engagement activities, and research and development efforts, to name a few.

A CDE® may be any senior executive in an organization, as employees expect their management team to serve as informal DEI leaders versus simply relying on the Chief Diversity Officer.

Using a business process transformation approach, the CDE® works to advance the organization beyond diverse representation towards thought leadership, as well as manage enterprise risks. The CDE® champions organizational values; models belonging and inclusive excellence; fosters a safe and healthy work culture; and/or leads enterprise-wide integration efforts. The level of learning is advanced.
What is Certification?

The primary purpose of any professional certification program is to provide an independent assessment of the knowledge, skills and/or competencies that are required for the successful performance of a professional DEI role. This assessment is typically accomplished by the successful completion of an examination. To ensure that IDC’s examinations are psychometrically sound, fair, legally defensible, and an effective measure of a Candidate’s knowledge and skills, IDC teams its examination development proficiency with the expertise of its subject matter experts.

A Candidate is an individual who is pursuing certification, while a Designee has already completed the program and successfully achieved a CDP® or CDE® credential. For purposes of IDC's Diversity, Equity & Inclusion Certification program, a credential is defined as a “formal recognition awarded to an individual who possesses DEI industry experience, has met predetermined high standards, and maintains renewal requirements.” A designation is defined as: “An indication that a DEI expert earned the right to use CDP® or CDE® after her/his/their name through an elite achievement and the demonstrated mastery of inclusive excellence.”

History of IDC’s Certification Program

Since its inception, IDC has relied on industry best practices for its professional qualification exams. Leah Smiley, founder of the Society for Diversity, sought to ensure that employers: (1) can hire employees and/or consultants with a high-degree of certainty that the professional was highly trained and productive; (2) could avoid costly business risks such as lawsuits and employee turnover; and (3) would deliver positive tangible results through its diversity initiatives.

2009 – 2011

From 2009-2010, IDC was privileged to draw on the subject matter expertise of its 17-member Board of Directors for the DEI industry’s first international certification program. The Board determined the 80.0% cut score for both assessments; contributed to the test questions and Candidate Project criteria; and set the 60-credit hour (or retest) recertification requirements. CDP Candidates could submit a project consisting of a Diversity Climate Analysis or Diversity Plan; while CDE Candidates could submit a project consisting of a Diversity Evaluation or Diversity Research. Both exams had 150 questions over 14 competencies (7 distinct and 7 overlapping), and allowed 2.5 hours for completion. Candidates could take the test during a quarterly exam window at one of 600 testing centers throughout the U.S. and Canada.

IDC and several Diversity Subject Matter Experts worked closely with Dr. Howard Mzumara, a Psychometrician at Indiana University Purdue University of Indianapolis (IUPUI) to develop the first CDP and CDE Exams, the Code of Ethics, and the Standards of Practice. Candidates could apply for certification by mail, fax, email, or online. IDC contracted with Performance Assessment Network (pan, a Talogy company)
headquartered in Carmel, Indiana to develop and proctor the first exams at a testing center. IDC’s initial exam heavily focused on a Candidate’s knowledge of U.S. Equal Opportunity laws, business strategy, diversity benchmarks, demographics, and diversity trends. The first pilot group participated in the exam from the U.S., Canada, Denmark, and France in 2011. The pilot group acknowledged that it was astonishing that the field had evolved so much and they were surprised to find that U.S. Diversity efforts were profoundly reliant on the legal system.

2013 – 2014
By 2013, the field had changed immensely. IDC adjusted its program terminology to reflect Diversity and Inclusion (D&I) versus Diversity alone. The exam was changed to 16 distinct competencies for the CDP and 16 distinct competencies for the CDE. Additionally, 20 more questions were added to each test for a total of 170 questions on both exams. The programs had over 200 Candidates enrolled, representing the corporate, government, education, and nonprofit sectors. In 2013, IDC began offering onsite prep courses for the certification exam in Indiana and Texas. At that time, IDC also allowed CDP and CDE Designee to obtain recertification credits by reviewing Candidate Projects or facilitating the online classes for the 8-week prep courses.

In the fall of 2014, IDC received approval from the state approving agency in Indiana for military servicemembers to use GI Bill benefits from the U.S. Department of Veterans Affairs to pay for the Certification Exam only. Additionally, IDC launched its first Job Analysis Survey in the Fall of 2014 to gather information about D&I work, including the duties, responsibilities, and educational requirements.

2015 – 2016
IDC moved to a smaller 11-person advisory council (IDCAC) in 2015, where the DEI Subject Matter Experts contributed to an exam refresh--reflecting the latest changes in terminology, strategies, research, and best practices. In 2015, the U.S. Air Force awarded a contract to IDC to conduct the CDP prep course and exam onsite at the Pentagon for 25 high-ranking military leaders. IDC also became a member of the Institute for Credentialing Excellence in 2016.

In 2016, the State of Washington first offered CDP and CDE credentials to 40 executives and aspiring managers in an onsite DEI certification program. The Governor noted that the certified leaders were particularly effective and required the credentials for current and aspiring state government executives. Additionally, IDC began to offer Certification prep courses on college campuses such as Hodges University (FL), Howard University (DC), and Martin University (IN), as well as at office parks in Chicago (IL) and Los Angeles (CA).

2017 – 2020
The Society for Diversity Inc. secured trademarks for the Institute for Diversity Certification (IDC)®, Certified Diversity Professional (CDP)®, and Certified Diversity Executive (CDE)® credentials from the U.S. Patent and Trademark Office (USPTO) in 2017. It also secured several state trademarks in Indiana, Florida, Illinois, New York, and
In 2017, IDC held the Diversity 3.0 Conference in Chicago, IL, and held its Diversity 4.0 conference in National Harbor, Maryland in 2018. Both events provided a showcase for CDP® and CDE® Designees to serve as keynote and breakout session speakers, as well as awards recipients. The event also featured a certification track for new Candidates, which was facilitated by Designees in exchange for CEU credits.

IDC updated its exam and curriculum in 2018, based on its most recent 2016-2017 Job Task Analysis. IDC adjusted its terminology again to reflect an industry shift to Diversity, Equity and Inclusion. It also transitioned to electronic files with the Talent Learning Management System. In the Talent LMS, Candidates could log-into a secure system to upload their Candidate Projects and track their certification status online. This represented a huge shift from emailing Candidate confirmations, Candidate projects, and other Candidate materials.

In 2018, IDC unsuccessfully applied for accreditation from the National Commission for Certifying Agencies (NCCA). Upon reviewing the feedback, IDC determined to make certain adjustments to its approach, policies, and assessments.

After George Floyd’s murder in 2020, IDC saw a significant spike in its certification program enrollment. Yet due to COVID-19 lockdowns, IDC was restricted to offering the entire certification program online only. Fortunately, IDC had already completed its electronic process transformation and was easily able to facilitate program access and virtual testing through the PanPowered network without any interruptions.

**2021 – 2023**

In 2021, IDC began working with the Ohio State University Center on Education and Training for Employment (CETE) to update its assessments and testing process. The 5th edition of the CDP® and CDE® exams were designed based on the 2021-2022 Job Task Analysis and Verification Survey. The assessments are now global in scope, allowing for regional nuances in strategy and approach, while applying industry best practices for planning, engagement, and measurement.

Due to COVID lockdowns, IDC held a virtual conference in 2021, featuring CDP® and CDE® keynote and breakout sessions. In 2022, IDC organized a hybrid summit on Employee Resource Groups (ERG’s). More than 200 Candidates and Designees participated online, while 100 individuals joined the Summit in-person in Atlanta, GA for an event focused on industry best practices and themed, “ERG – More Than an Acronym.”

By 2021, IDC had outgrown the functionality offered by Talent LMS so it migrated the Learning Management System to CourseNetworking (or The CN). In 2022, IDC engaged the CN and Talogy to customize and integrate its Learning Management System and testing platform.
The CN hosts the online study guide, Candidate Project samples, recent industry articles and videos, practice test questions, slide presentations, and more. Candidates and Designees can create a DEI ePortfolio; engage in social learning; track their progress; as well as share news, success stories and events. IDC’s high-stakes DEI assessment is administered by Talogy TrueTalent on the PANpowered platform. The Talogy TrueTalent system provides state-of-the-art, secure internet-based testing, and proctored administration at over 600 locations in North America. IDC also utilizes Talogy’s RPNow platform for cloud-based, proctored testing on a personal/company electronic device from anywhere in the world. Candidates can log-into the CN to schedule their exam at a testing center or access the RPNow platform for virtual proctoring. Once testing is completed, Candidates can access their score report from the knowledge exam or Project on the CN learning management system. Designees can upload their Continuing Education Units (CEU’s) on the CN as well.

Today, IDC has thousands of Candidates and Designees in 50 U.S. states and 30+ other nations. Certification prep courses are offered in North America, South America, and EMEA+APAC (Europe, Middle East and Africa, plus Asia Pacific). In January 2023, IDC conducted a two-week pilot of its new CDP® and CDE® assessments for 635+ DEI professionals throughout the U.S. and in nearly 10 other countries. The cut scores were adjusted to 73.0% for the CDP® exam and 74.0% for the CDE® exam.

**Examination Overview**

IDC’s certification examination was created by a panel of industry experts representing all aspects of Diversity, Equity, and Inclusion work. Questions were developed from a job task analysis survey. *A job task analysis* is the foundation for any valid certification program and helps identify the core knowledge areas, critical work functions, and/or skills typically found across a representative sampling of current practitioners or job incumbent workers.

Throughout 2021 and 2022, IDC’s Subject Matter Experts (SME’s) worked with the Ohio State University’s Center on Education and Training for Employment (CETE) to conduct a Job Task Analysis and validation survey for the CDP® and CDE® programs. Empirical results from the job analysis provides DEI Certification Candidates and the public with a valid, reliable, fair, realistic, and legally defensible assessment that reflects the skills, knowledge and abilities required to competently do a job that leads, manages, and/or supports effective Diversity, Equity & Inclusion work. Our research-based approach also ensures that DEI leaders achieve expected performance outcomes.

**Preparing for the 2023 Examination**

To prepare for the examination, review the:

- Examination content outline,
- Eligibility prerequisites,
- Certification requirements,
• Candidate handbook, and
• Study materials.

There are free practice tests and exam review sessions in the CN system. IDC’s Certified Diversity Executive (CDE)® Examination Study Guide is intended to serve as a recommended source for study. The study guide lists additional references that should be considered for review.

**Note:** The Certified Diversity Executive (CDE)® Examination Study Guide, published by IDC should NOT be considered the sole source of information for the certification examination. The Certified Diversity Executive (CDE)® Examination Study Guide and Certified Diversity Executive (CDE)® Examination are written by separate entities. The examination tests a body of knowledge rather than information obtained solely from a specific source.

**Areas of Knowledge**

The examination is made-up of nine areas of knowledge, or domains. Each knowledge area shows a percent, which reflects the percentage of questions associated with that knowledge area/domain on the examination. These knowledge areas may change based upon a new job task analysis, which occurs every 3-5 years.

A. Engage In Professional Self-Development and Continuous Learning
B. Advance Leadership for Organizational DEI
C. Manage DEI Strategic Planning and Budget
D. Champion Organizational DEI Policies, Compliance, and Governance
E. Champion Organizational Values and Inclusive Culture
F. Advance Organizational Staff Education, Development, & Training
G. Leverage DEI Stakeholders & Partnerships
H. Lead Organizational DEI Initiatives & Integration Efforts
I. Collaborate On DEI Organizational Communications & Engagement

**Examination Questions**

The examination consists of 100 multiple-choice questions that must be answered within a 2.5 hour (150 minutes) time limit. Each question has four possible options listed, but only one answer is correct. All of the questions are scored; therefore skipping test questions is not an effective strategy for passing the exam. Candidates must complete each Domain before moving onto the next section. Accordingly, a participant may receive a 75% in Domain A and a 100% in Domain G. Scoring in the Domains will be averaged out for the final result.
APPLYING FOR CERTIFICATION

The IDC Application Process

Apply for the certification examination on IDC’s website, under Examination Application. The correct payment must accompany the application. Application fees are described in Appendix F. There are no deadlines to apply for certification. Also IDC operates a year-round testing program, which means that you can take the assessment at any time.

Note: A Candidate’s application to the CDE® examination is an attestation that the Candidate has met and complies with the Certification Eligibility Requirements. IDC reserves the right to verify any and all information that is listed in a Candidate’s application.

Certification Eligibility Requirements:

- At least five (5) years of experience
- A current leadership role
- A passing score on the CDE® examination (which is at least 74.0%)
- A passing score on a Candidate Project or an approved professional work
- Compliance with IDC’s Code of Ethics
- Compliance with IDC’s Standard of Practice

Note: IDC’s preparatory course and/or materials are NOT a requirement for eligibility of this examination or certification.

Experience and Leadership Requirements

The Certified Diversity Executive (CDE®) credential challenges conventional equity and diversity work, and reinforces the need for organizations to lead inclusion from the top.

Experience can be defined as your professional history of managing people or projects. Such experience shall include, but not be limited to, being directly accountable for DEI, planning, operations, talent management, finances, legal/risk management, marketing/sales, and technology. The work may consist of administration, on-the-job training, past employment performance, or other senior level knowledge and responsibilities within an organization.

A Current Leadership Role includes those who have terminated employment within the last six (6) months. Candidates may serve on the Board of Directors; oversee an entire agency, town/city/state/nation, or enterprise; manage (or aspire to manage) a division or department; lead a resource group or diversity council; or work in any other decision-making capacity. Additionally, the individual may or may not have direct reports.

For questions about whether your experience qualifies, please call 1-800-983-6192.
Application Rejection

Applications will be rejected for failure to meet eligibility standards or falsification of information. Candidates will receive notice of rejection within 48 hours of applying. Any fees paid will be refunded if the Candidate chooses not to correct the information and/or re-apply.

CDE® Knowledge Examination Score

The passing score on the CDE® knowledge Examination is 74.0%. IDC does not round or offer extra credit. Also, passing the CDE® knowledge Exam will not automatically result in IDC conferring credentials. Candidates must also pass the peer review portion of the assessment, via the Candidate Project.

CDE® Candidate Project Score

The passing score of the CDE® Candidate Project is 12/20. The knowledge-based exam score and Candidate Project results are separate (i.e., a passing score in one will not offset the other). Candidates must pass both the knowledge exam and Candidate Project in order for one to obtain their credentials from the Institute for Diversity Certification.

Candidates may submit any work that will be usable on the job, or in a new position. Projects can be submitted in various stages: ideas, in-process, or completed works. Detailed information on the Candidate Project can be found on page 11 of this handbook.

Compliance

A Candidate must comply with IDC’s Code of Ethics and Standard of Practice. These documents are provided in Appendices D and E of this handbook.

Candidate Certification Time Frame

Candidates must pass the examination and complete the Candidate Project within twelve (12) months. If you do not complete both assessments by the end of the month approximately one year from when you registered, your CN system access will automatically deactivate. You must pay a $350 exam change fee in order to reactivate your access. Once you pay this fee, you will receive an additional year to complete the program.

The CDE® Certification is valid for 3 years. Candidates must recertify to maintain their designation.
Examination Reschedule Policy

IDC offers year-round testing. Candidates may take the knowledge exam or submit the Candidate Project at any time. If necessary, a Candidate may reschedule their knowledge-based examination at any time. There is no fee to reschedule the examination within 48 hours of the test. Candidates may login to the CN system to change their exam date.

Late Cancellation Policy

Any changes not made within 48 hours of the knowledge exam appointment are considered a late cancellation and will require a $350 examination change fee. There are no exceptions to this late cancellation policy.

Returned Checks Policy

An administrative fee of $35 will be charged for all returned checks.

Nondiscrimination Policy

IDC does not discriminate on the basis of age, gender, race, religion, national origin, disability, sexual orientation or any other characteristic protected by law.

Questions/Concerns

The Institute for Diversity Certification program is the leading standard for diversity, equity, and inclusion certification because we value feedback. We work hard to ensure that this credentialing process exceeds your expectations, and we will attempt to resolve any problems that may arise. IDC maintains an exceptionally high standard of quality and professionalism. IDC guarantees 100% satisfaction with the credentialing process. IDC encourages Candidates to share their expectations, feedback, and recommendations for improving subsequent Candidate experiences with the program. Should a Candidate or Designee have a complaint, please contact us immediately by phone at: 1-800-983-6192 or email at: info@diversitycertification.org

LEARNING MANAGEMENT SYSTEM

Course Networking Overview

CourseNetworking, or The CN, is an innovative Learning Management System (LMS), ePortfolio and Learning Tools Interoperability (LTI) system that transforms your certification experience and showcases your professional DEI accomplishments. Every Candidate and Designee receives access to The CN, where you will have year-round access
to social learning, up-to-date educational resources, badging, information about Continuing Education courses, and more.

For detailed information about how to navigate the CN learning platform you may watch a video here: The CN Tutorial

Registration

Once you register for an examination or optional training course, you will receive an email with your CN login credentials.

A Candidate’s access to the LMS system expires one year from the date that they enrolled. To extend access, Candidates must submit an examination change request for the next year or complete the program. Upon completing the program, the Candidate is re-classified as a Designee, or a certified individual, and LMS access is automatically extended for three (3) years.

Features

The Institute for Diversity Certification (IDC)® Learning Management System (LMS) is designed to provide convenience, collaboration, and improved functionality. Where applicable, you may access certification information, course schedules, the online version of the study guide, presentation slides, practice test questions, the Examination Review Session, Candidate Project materials, and more. CDP® and CDE® Candidates will be able to access the Examination Review Session and upload their Candidate Project for one (1) year.

The CN also provides an opportunity for you to:

- Access the CDE® examination and score report from the CN system with a single sign-on ID (SSID)
- Build a complete ePortfolio showcasing your Candidate Project, resume, skills, and other Diversity, Equity and Inclusion (DEI) work
- Easily share your certificate or badge for the CDP® or CDE®, as well as your DEI ePortfolio and accomplishments on other social media sites
- Network with thousands of IDC Candidates and Designees around the world
- Use any device to download and/or print the course materials

Designees may use the LMS to log recertification credits; find out when their certification expires; access badges or certificates; update their contact information; volunteer to serve as a guest speaker for online classes or review Candidate projects in exchange for continuing education credits; review the most recent version of the study guide; connect with other Candidates and Designees; participate in online courses or in-person events with preferred providers; and more.
Copyright

The content on the LMS is registered with the U.S. Patent and Trademark Office (USPTO) and is protected under American copyright laws. Please do not share your access to the LMS with any unauthorized users, or your online access to the system will be permanently revoked. An “unauthorized user” is defined as anyone who has not formally applied for Certified Diversity Professional (CDP)® or Certified Diversity Executive (CDE)® credentials with the Society for Diversity Institute for Diversity Certification.

CANDIDATE PROJECT

Overview

A Candidate Project is a professional work that demonstrates your experience in the field of diversity, equity, and inclusion. Beyond understanding the mechanics of DEI, the professional work indicates that you are also competent in creating diversity and inclusion tools that can enhance your effectiveness on the job. Projects will be evaluated by DEI subject matter experts for thoroughness, accuracy, and impact.

The Candidate Project must be usable, meaning that a Candidate should not create a hypothetical project. This professional work should be meaningful and add to your portfolio of Diversity, Equity, and Inclusion achievements. You can submit work that you developed or will be used on the job, as a consultant, or as a volunteer. The project must be the Candidate’s own work and have been completed within the last year. If the Candidate was certified in the CDP® and plans to certify in the CDE® as well, they may use the same Candidate Project as long as it is updated.

Additional Candidate Project examples, instructions, and other detailed information is provided in the CourseNetworking LMS.

Group Projects

Group projects are acceptable; however, the project should list all group participants on the cover page (along with the credential sought) and describe how each individual Candidate contributed to the project. Each Candidate must contribute to the work, and it must have been completed within the last year. The maximum number of people who can participate in a group project is five (5).
Deadline

The Candidate project must be uploaded within the one (1) year timeframe. You may submit your project as early as you choose, but late projects will not be accepted without an Exam Change request. The Testing Center will not accept your Candidate Project.

Candidate Project Confidentiality

From time to time, the Institute for Diversity Certification (IDC) updates its Candidate Project samples. If you do not want your Candidate Project to be used as a model, or if your organization has guidelines around sharing corporate information, please mark your project "Confidential". Keep in mind, each reviewer signs a Non-disclosure Agreement.

Project Evaluation

The Candidate Project will be reviewed by a Subject Matter Expert with CDP® or CDE® credentials. They will determine if the project meets the criteria for a certified executive. Detailed instructions for the Candidate Project are available in the CourseNetworking LMS.

**Note:** IDC Certification staff will not review the Candidate project or be involved in the evaluation process.

Project Results

Once the project evaluation is complete, Candidates may view the Candidate Project score result (pass/fail) in the Learning Management System. The Candidate will receive a notification email from CourseNetworking, which is titled “Your Assignment Has Been Graded”. The Candidate may also directly check back into the course and look at the “Submit your Candidate Project” activity for assessment results and feedback.

**Note:** You will not be provided with the Candidate Project score, however, you can view the assessor’s comments and you may message the reviewer to obtain clarification if your project failed for any reason.

**Note:** The Candidate Project course will be marked COMPLETE in the CN system when your project passes; projects that did not pass will show the course as INCOMPLETE.

Re-Submission

Should your Candidate Project receive an "Incomplete" assessment, you will be provided with an opportunity to make revisions and resubmit your professional work. Your resubmission will then be reviewed by a project evaluator who may or may not be the previous assessor.
Note: IDC Certification staff will not be able to clarify or explain your thoughts and reasoning to a project evaluator. Please proofread your project before submitting it on the CN system.

Examples of Candidate Projects

- Strategic Diversity Plan
- Diversity Climate Analysis or a Culture Audit
- Business Case for Diversity (or Supplier Diversity)
- Multi-cultural Marketing Strategy
- Research or a Book excerpt, if the Candidate is an author
- Annual Report or Diversity Evaluation
- Job Description or Scope of Work for a new DEI role
- Proposal to Develop Resource Groups or a Diversity Council
- Proposal to Create a formal Office of DEI or Chief Diversity Officer role
- Proposal to Conduct entity-wide Diversity Training
- Proposal to Recruit, Engage, Promote or Retain Diverse/Global Candidates
- A Business Plan for a Consulting Enterprise
- Other usable projects

Evaluation Criteria

The following four (4) criteria will apply to Candidate Project peer reviews. DEI Subject Matter Experts will assess whether the project is:

- **Realistic:** possessing a practical and/or accurate idea of what can be accomplished (e.g., it may not be realistic to achieve 20 strategic plan goals in the first year; however, it may be realistic to accomplish 20 goals over four or five years)

- **Usable:** the ability to (1) provide insight into data, policies, practices and processes; (2) execute a plan/project/program systematically; (3) conduct an analysis through a culture audit, listening tour, focus group, etc.; and/or (4) apply a method/research that will integrate DEI throughout an operation for the benefit of the organization (e.g., creating a hypothetical scenario may not be usable unless it is intended to serve as a blueprint, best practice, etc.; however, using a case study or examining a current lawsuit may be usable in training supervisors, or helping other employers avoid a problem)

- **Intentional:** devising and executing a relevant, sustainable DEI strategy or initiative that achieves deliberate results over time (e.g., designing a DEI strategy that is disconnected from organizational goals may not achieve its purpose; however, establishing the business case or using data to track progress on a quarterly basis may achieve desired results)
• **Meaningful**: the capacity to determine the quantity, quality, and/or value of DEI efforts; the ability to assess, measure, and compare the organization and its culture using established data with the intent of making a positive impact (e.g., developing a program for one identity group may result in an imbalanced effort or backlash—which would have a negative effect; however, securing executive sponsors or allies may establish more buy-in and support—which would allow for more progress)

**TESTING**

**Scheduling the Test**

Knowledge exam scheduling is offered through Talogy. Talogy provides state-of-the-art, secure internet-based testing and proctored exam administration at over 600 locations throughout the world. The TalogyTech system offers easy examination scheduling on weekdays, weekends, and in the evenings, where available. You also have the option of taking a proctored exam virtually on your own electronic device. This feature uses the RPNow Record and Review function.

Talogy testing administration and scheduling is accessible from the CN system ([The CN](https://www.idc.com)). The CN contains more detailed information and instructions. It is not required that you notify IDC of changes to your plans unless the testing time falls outside of the 1-year period.

**Accommodations**

Candidates who require accommodations may request an accommodation while scheduling their knowledge exam. This will be done through CourseNetworking. A Candidate also may send a written request to IDC by contacting Chantee’ Mickinney at chanteemckinney@societyfordiversity.org. The request must indicate the nature of the disability and specify the accommodation requested. Certain disabilities may require an extended time test, which provides 90 additional minutes to complete the examination. The request must be submitted to IDC at least 2 weeks (14 days) prior to the examination date. Candidates will be notified in writing if their request is approved. All accommodation requests are considered confidential.

**Testing at home/work**

The examination is a closed-book test. You must use an electronic device with a camera, complete a room scan, and have photo identification. A more detailed list of system requirements is available in the CourseNetworking LMS. Candidates may submit their Projects in CourseNetworking prior to taking the examination, or within the one-year period.
Testing at an Exam Center

Talogy’s high-stakes, proctored testing environments are conveniently located and configured for optimal concentration and minimal stress. Each testing center is quality controlled, maintained to the highest standards, and regularly sanitized for safety. On the day of the test, the Candidate must bring their photo identification and arrive 15 minutes early. Leave plenty of time for parking and/or locating the testing center if you are not familiar with the area. Also, no pocketbooks, bookbags, laptop bags, or other materials will be allowed at your testing station. Candidates must submit their Candidate Projects in the CourseNetworking LMS, as the testing center will not accept any projects.

Examination Security

Candidates are obligated to keep all examination content confidential, by virtue of initiating the examination at a testing center, at home/work, or on any other electronic device. Candidates may not disclose questions or answers, nor may Candidates receive information about questions or answers from others. IDC has the right to cancel a Certified Diversity Executive (CDE)® or Certified Diversity Professional (CDP)® examination score if it finds any evidence of any irregularities in an examination whatsoever. IDC is the final authority that determines who has the privilege of sitting for the examination and whether the score received is applicable to obtaining credentials.

Exam Questions/Comments

Candidates may provide comments for any question on the examination. Following the completion of their test, Candidates will be given the opportunity to leave a question or comment. The question or comment should include as much detailed information as possible. Questions and comments will be forwarded to the appropriate Committee for review.

AFTER THE TEST

Examination Scoring/Results

The IDC examinations are scored by Talogy on the PanPowered Platform. Your grade and score report can be accessed by logging into your CN account (The CN). The Score Report will show how you scored in each Domain, or knowledge area. A 74.0% is a passing score.

Receiving CDE® Credentials

You will be notified in writing once you successfully pass the knowledge-based exam and Candidate Project. Those who pass and receive certification will be able to access the CDE®
badge and certificate in the CN system under the documents section. Candidates will also be listed on the Institute for Diversity Certification’s online directory of certified diversity professionals and/or executives. Designees may begin using the CDE® credentials after their name immediately upon notification of success. If a current or prospective employer requests your Certification number, please use your CN number.

**Note:** Candidates should not use the CDE® credentials until after they have been notified that the entire program has been successfully completed.

**Retest Policy**

Candidates who fail the CDE® examination are eligible to retake the assessment. Candidates must wait 28 days (approximately 4 weeks) before retesting. Each Candidate can only take the examination a maximum of two (2) times in one calendar year. The retest fee is $599 per sitting.

**Request to Rgrade the Knowledge Examination**

A Candidate may request to have their knowledge examination regraded. A fee of $35 will be charged for each regraded test. The regrading process is hand-scored and will take approximately 45 days. The request must be made to Francesca Zinkovitch at francesca@societyfordiversity.org within one (1) month of taking the exam. In the event that the regrading results in a passing score, the regrading fee will be refunded in full.

**Examination Security**

The CDE® exam is a high stakes, proctored assessment. Candidates may not use books, notes, or other materials to provide assistance with passing the test.

Candidates/Designees are obligated to keep all examination content confidential. Candidates/Designees may neither disclose any questions or answers, nor may Candidates receive information about questions or answers from others about the test. IDC will not provide the questions that a Candidate/Designee skipped or answered in error. Nevertheless, the knowledge exam score report is a vital component of performance, and will provide direction in respect to the remedial domains.

IDC has the right to cancel a Certified Diversity Executive (CDE)® or Certified Diversity Professional (CDP)® examination score if it finds any evidence of irregularities in a test whatsoever. The IDC is the final authority that determines who has the privilege of sitting for the Examination and whether the score received is applicable to obtaining credentials.

**Records Retention & Electronic Access**

Webinars, data presentations and other electronic recordings may be accessed by Candidates for 1 year. The Institute for Diversity Certification maintains a professional file
for each Candidate and Designee. The file includes the application for credentials, score report(s), Candidate project, certificate, recertification credits and other information pertinent to the professional development of each Candidate/Designee. These records are kept on file for a minimum of 10 years and are maintained regularly. Should you move or change jobs, please notify us so that we can update our records. Also, please change your contact information in the CourseNetworking LMS.

**Confidentiality & Non-Disclosure Statement**

While the Institute for Diversity Certification (IDC)® may have several Candidates and Designees from similar sectors, it is our intent to facilitate networking and information sharing for the purposes of developing best practices across industries. We encourage Candidates and Designees to initiate interaction and leadership in benchmarking discussions with other Candidates/Designees. It is up to the Candidate/Designee to determine what to disclose based on what will be beneficial for a particular field or industry.

Periodically, IDC will conduct surveys about the diversity, equity and inclusion field. These anonymous surveys allow the IDC to glean relevant information about current work practices, industry trends and other professional data. We encourage you to participate in the surveys and share general information about your demographic, as well as your professional inputs, outputs, and outcomes to advance diversity, equity and inclusion work globally. The IDC publicly publishes this data biennially.

Finally, the IDC understands the competitive, legal, and private nature of diversity, equity and inclusion work. It is the IDC's policy to maintain strict confidentiality regarding all Candidate and Designee records. Neither the IDC nor any of its employees, Designees, consultants, facilitators, Candidate project reviewers, advisory board members, or other individuals associated with the organization, will disclose or use Candidate/Designee records or other confidential information shared during preparation courses, in an effort to advance or benefit the IDC or any other individuals aforementioned. No Candidate or Designee records shall be copied or faxed without the express written consent of the Candidate/Designee. Assessment scores will only be disclosed to the Candidate/Designee; if an employer requests a score report, the Candidate/Designee must provide it.

Occasionally, employers will request certification verification. IDC will only confirm that: (1) you have credentials from IDC; (2) the credentials are active; (3) the date you received the credentials; and (4) your CN number. IDC will not share how many times you took the test; whether you participated in the pilot or requested accommodations; your score report; who paid for the exam; or other personal information. Employers may call IDC at 1-800-983-6192 or email info@societyfordiversity.org for a certification verification. Should a Candidate or Designee request a letter of recommendation or require other verifications, the request must be in writing to info@diversitycertification.org.
Appeals Process

Candidates have the right to appeal any adverse decision made by the IDC. An appeal must be submitted in writing within 2 weeks (14 days) after receiving an adverse decision notification by contacting the IDC. Send appeals in writing to Francesca Zinkovitch at francesca@societyfordiversity.org. The Discipline and Appeals committee will review the appeal and make a decision within 90 days. IDC’s decisions are final.

RECERTIFYING

Maintaining CDE® Certification

Recertification demonstrates your commitment to diversity and your continued mastery of the field. It also indicates accountability. Shareholders, Board Members, and clients/constituents alike insist on the highest possible standards of personal integrity, professional competence, sound judgment, and discretion from senior leaders. Designees must accrue 60 continuing education units (CEUs) every three (3) years by participating in qualifying professional development activities, as well as pay a $50 fee.

These are the requirements to maintain Certification:

- Pay the $50 recertification fee once every three (3) years
- Earn 60 continuing education credits every three (3) years
- Comply with IDC’s Code of Ethics
- Comply with IDC’s Standard of Practice
- Keep us updated! Let us know if your contact information changes and share your successes in this survey

The recertification cycle begins the day after notification of successful CDE® certification. Recertification credits must tie directly to the broad domains of the CDP® or CDE® credentials. There are many ways for you to acquire CEUs on your own or through IDC volunteerism, The Society for Diversity membership activities, or an official recertification provider.

Note: Designees will no longer be able to recertify by re-testing. Recertification is obtained only by earning 60 continuing education credits.

Continuing Education Credits

The recertification journey can reflect your career progression, advanced competence, leadership, innovation, and/or any other activity that is meaningful to your occupation or the DEI industry. Some credits may be applicable to multiple certifications, such as IDC, HRCL, SHRM, or other programs. See Appendix C of this book for the Credit Advisor.
Calculating Your Continuing Education Credits

The IDC certification maintenance program promotes continuing education throughout a Designee’s career by requiring continuing education credits. A Designee may log one credit for one hour of activity. The IDC recommends that a Designee acquire 20 continuing education credits per year. Once a Designee reaches 60 credits, there is no need to submit additional credits. As a best practice, enter the credits upon completing the activity. Only submit the recertification form on or after the date that your credentials expire.

Recertification Credit Opportunities

Recertification credits must tie directly to the broad domains (or knowledge areas) for the CDE® credentials. There are many ways for you to acquire continuing education credits on your own or through the Institute for Diversity Certification (IDC)®. Currently, there are opportunities to:

- Review Candidate Projects
- Publish
- Present
- Volunteer

Contact Chantee’ Mickinney at chanteemckinney@societyfordiversity.org if you are interested in any of these opportunities. You may also use CourseNetworking to volunteer for continuing education credits.

Submitting Recertification Credits

Recertification credits must be submitted by using CourseNetworking. See Appendix C for a list of possible activities. You can enter recertification credits at any time online. Only submit the recertification form on or after the date that your credentials expire.

Recertification Lapse Policy

If your certification lapses more than one (1) year, Designees will pay a $250 recertification fee and submit a new Candidate Project for peer review on the CN system.

Professional Discipline Policy

While the Institute for Diversity Certification (IDC)® has no regulatory authority over diversity, equity, and inclusion professionals and executives, the IDC does develop and promote professional standards, as well as impose sanctions on Designees who engage in unethical, immoral, defamatory, fraudulent, deceitful, grossly negligent, discriminatory, abusive, or other harmful behavior(s). Sanctions may also be imposed if a CDP® or CDE® Designee misrepresents themselves or is practicing in a manner inconsistent with IDC’s Code of Ethics or Standard of Practice.
At the conclusion of a disciplinary proceeding, possible sanctions may occur such as: reprimand, censure, suspension, or revocation of certification. If revocation occurs, the DEI leader involved will no longer have permission to use the CDP® or CDE® credential.

Misrepresentation by a CDP® or CDE® Candidate/Designee will result in a total ineligibility for the CDP® and/or CDE® credential (i.e., stating that you are a CDE® when you achieved the CDP®, or using the credentials before successfully completing both the knowledge exam and Candidate Project).

If you feel that a violation has occurred and would like to file an official complaint against a certified diversity, equity, and inclusion leader, please contact info@diversitycertification.org and complete a disciplinary complaint form.

Candidate Declaration & Release

Upon submitting an application to the IDC to be a Certified Diversity Professional or Executive, I affirm that I will comply with the Institute for Diversity Certification’s standards, rules, policies, and procedures. I understand that the information gathered in the certification process may be used by the Institute for Diversity Certification for statistical purposes for the evaluation of the credentialing program or for other research or study. I further understand that the Institute for Diversity Certification will use reasonable efforts to keep the information in its possession confidential. I understand that the Institute for Diversity Certification reserves the right to verify any or all of the information associated with or required by this application, and that providing false or misleading information, omitting required information, or otherwise violating the rules of certification, may result in the revocation of my credentials. I further understand that I must immediately notify the Institute for Diversity Certification of any changed circumstances that may affect this application and the information that has been provided, or that may affect my continuing certification eligibility.

I understand the examination is the property of the IDC and is protected by contract, trade secret, and federal copyright laws. It is a violation of those laws and rights to share any information whatsoever about any question or answer from the examination. In particular, sharing information about an examination question or answer recalled from memory or asking someone who has taken the examination to share such information is illegal and unethical. I understand that in order to take the examination I will be required to read and agree to a Candidate Examination Security Agreement, a copy of which can be requested for review before scheduling an examination.

I understand that I can be disqualified from taking or completing the examination, or from receiving examination scores if the Institute for Diversity Certification (IDC)® determines through either proctor observation or statistical analysis that I have engaged in collaborative, disruptive, or other inappropriate behavior during the administration of the test, or in the completion of the Candidate Project. I agree that I will not list my passing status on any professional stationary or business cards, nor will I use it in any advertising until I have been notified in writing that I have passed both parts (the knowledge examination and the Candidate Project) of the Institute for Diversity Certification’s assessment process. I understand that I am not authorized to use the CDE® certification mark until granted the right to use the credentials by IDC following successful completion of the CDE® knowledge exam and project.
I recognize that the Institute for Diversity Certification (IDC)® is the sole and only judge of my qualification to receive and maintain certification. I further recognize that the Institute for Diversity Certification reserves the right to modify or alter at any time the certification standards, the requirements for certification and/or recertification, and any rules, policies, or procedures in connection therewith. I authorize the Institute for Diversity Certification (IDC)® to include my name and contact information in any publicly available lists or directories in which the names of certified diversity professionals and executives are published, and hereby waive any rights or objections to such listings in the event that an employer seeks to verify my credentials. I understand and agree that the Institute for Diversity Certification (IDC)® owns all rights, titles, and interest in and to all names, trademarks, logos, copyrights, applications, and other materials related to the Diversity Certification program, and I agree that I shall only use such intellectual property in accordance with policies promulgated by the Institute for Diversity Certification (IDC)® and agree to cease using such intellectual property upon the expiration, suspension, or termination of my certification, or I am requested to cease for other reasons beyond my control.

I understand and agree that neither the Society for Diversity nor the Institute for Diversity Certification (IDC)® makes any claims, warranties, guarantees, or promises regarding the content or performance of the CDP® or CDE® credentials, or pertaining to a Designee’s ability to secure employment or clients as a result of possessing the credentials. I agree that I will not misrepresent my certification status and its meaning. I also attest to the accuracy and validity of, and assume full responsibility for, the content of my application and all materials and information submitted to the Institute for Diversity Certification (IDC)®.

I further represent and warrant that any Candidate Project submitted to the Institute for Diversity Certification (IDC)® is my own original work; I am the sole owner of the work product; the Project does not violate any copyright, trademark, proprietary or personal rights of others; and my Candidate Project is factually accurate and contains no defamatory, unlawful or otherwise harmful data.

In consideration of my application to and participation in IDC’s credentialing program, I do hereby release, discharge, and hold harmless individually and collectively the Society for Diversity, Institute for Diversity Certification, and their officers, directors, employees, volunteers, board members, members, subsidiaries, agents, successors, and assignees, from any and all liability that may arise, either directly or indirectly, now or in the future, by reason of or in connection with any decision, action or omission relating to this application, the failure of the Institute for Diversity Certification (IDC)® to grant certification or recertification to me, the revocation of my certification, or any adjustments to IDC’s standards. This release and waiver of liability shall be binding on my heirs, executors, administrators, successors, and assignees.

I also understand and agree that in considering this application, the Institute for Diversity Certification (IDC)® may make inquiry of such persons or entities, inspect such records, and make and retain copies of such materials as the Institute for Diversity Certification (IDC)® deems appropriate. Without limiting the generality of the foregoing, I hereby authorize the Institute for Diversity Certification (IDC)® to make such inquiries regarding my fitness for certification and authorize any persons or entities contacted by the Institute for Diversity Certification (IDC)® to respond to such inquiries and provide copies of any relevant and non-confidential information to the Institute for Diversity Certification (IDC)®. I further authorize the Institute for Diversity Certification (IDC)® to provide a copy of this statement to those entities contacted by the Institute for Diversity Certification (IDC)® in connection with my application.
APPENDIX

A. Certified Diversity Executive (CDE)® Content Outline

The Certified Diversity Executive (CDE)® Examination tests the following knowledge areas.

Domains are the major duties and tasks that characterize a Diversity Executive. The blueprint shows the approximate percentage of test questions for each domain.

<table>
<thead>
<tr>
<th>Certified Diversity Executive (CDE)® Blueprint</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>DOMAIN A. ENGAGE IN PROFESSIONAL SELF-DEVELOPMENT &amp; CONTINUOUS LEARNING</td>
<td>11%</td>
</tr>
<tr>
<td>DOMAIN B. ADVANCE LEADERSHIP FOR ORGANIZATIONAL DEI</td>
<td>12%</td>
</tr>
<tr>
<td>DOMAIN C. MANAGE DEI STRATEGIC PLANNING AND BUDGET</td>
<td>20%</td>
</tr>
<tr>
<td>DOMAIN D. CHAMPION ORGANIZATIONAL DEI POLICIES, COMPLIANCE &amp; GOVERNANCE</td>
<td>12%</td>
</tr>
<tr>
<td>DOMAIN E. CHAMPION ORGANIZATIONAL VALUES AND INCLUSIVE CULTURE</td>
<td>22%</td>
</tr>
<tr>
<td>DOMAIN F. ADVANCE ORGANIZATIONAL STAFF EDUCATION, DEVELOPMENT, &amp; TRAINING</td>
<td>12%</td>
</tr>
<tr>
<td>DOMAIN G. LEVERAGE DEI STAKEHOLDERS &amp; PARTNERSHIPS</td>
<td>3%</td>
</tr>
<tr>
<td>DOMAIN H. LEAD ORGANIZATIONAL DEI INITIATIVES &amp; INTEGRATION EFFORTS</td>
<td>2%</td>
</tr>
<tr>
<td>DOMAIN I: COLLABORATE ON DEI ORGANIZATIONAL COMMUNICATIONS &amp; ENGAGEMENT</td>
<td>6%</td>
</tr>
</tbody>
</table>

**DOMAIN A: ENGAGE IN PROFESSIONAL SELF-DEVELOPMENT AND CONTINUOUS LEARNING- 11%**

1. Participate in professional conferences
2. Participate in networking activities (e.g., DEI colleagues/peers, industry professionals, ERGs)
3. Identify best practices for applicability to the organization
4. Participate in internal/external education and development activities (e.g., seminars, workshops, online)
5. Participate in personal performance review process (e.g., goal setting, self-assessment, performance review)
6. Participate in DEI and related professional organizations (e.g., domestic, international)
7. Maintain professional certifications/credentials (e.g., CDP/CDE, IDI, industry-specific)
8. Explore personal worldview/assumptions and their impact/influence on work (e.g., listening sessions, self-assessments, inventories)
9. Engage with different/opposite viewpoints (e.g., embrace discomfort, promote dialogue, solicit feedback)
10. Monitor emerging landscape for DEI insights (e.g., lessons, trends, threats)
11. Contribute to professional DEI body of knowledge (e.g., articles/op-eds, speaking engagements, blogs/vlogs)
12. Provide DEI leadership in paid/volunteer opportunities (e.g., advisory boards, task forces, corporate boards)
13. Monitor personal well-being (e.g., physical, mental, emotional)

**DOMAIN B: ADVANCE LEADERSHIP FOR ORGANIZATIONAL DEI - 12%**

1. Promote transparency and accountability among leadership on DEI and related issues
2. Provide leadership to executive team on DEI initiatives, priorities, and strategies (e.g., mentor, coach, meet them at their stage of CC)
3. Serve as organizational thought leader for DEI and cultural competence disciplines
4. Guide systems-level solutions and change management interventions
5. Oversee Diversity Advisory/Action Council
6. Embed DEI integration through seamless proactive approaches to DEI issues
7. Conduct community-based participatory research (e.g., focus groups, design thinking)
8. Identify mentorship opportunities for executive team and board members (e.g., internal, external)
9. Verify diverse talent pool and sourcing for executive/board positions
10. Participate in candidate selection process for executive/board positions (e.g., achieve diversity, identify perspectives, biases)
11. Secure sponsorship for organizational DEI projects
12. Analyze leadership hiring and promotion practices and competencies (e.g., KSAs, success profiles)

**DOMAIN C: MANAGE DEI STRATEGIC PLANNING AND BUDGET - 20%**

1. Conduct strategic planning analysis (e.g., SWOT, needs, PESTLE)
2. Provide insight into demographics (e.g., changes, baselines, trends)
3. Partner with key executives to define diversity, equity, and inclusion for the organization
4. Develop DEI strategic plan (e.g., misalignment, embed business case)
5. Align DEI strategies with business units and organizational functions/strategies (e.g., location, industry)
6. Develop job design for DEI staff roles
7. Develop DEI budget (e.g. impact statements, proposed expenditures, fiscal year outcomes)
8. Define metrics and measures of DEI strategic plan
9. Identify DEI measurement tools (e.g., surveys/assessments, spreadsheets, software)
10. Develop strategic interventions and actions to ensure defined outcomes
11. Monitor expenses and expenditures compared to budget
12. Report progress to key stakeholders (e.g., analyze data, benchmarking, provide recommendations)

**DOMAIN D: CHAMPION ORGANIZATIONAL DEI POLICIES, COMPLIANCE, AND GOVERNANCE - 12%**

1. Incorporate inclusive language in organizational position descriptions (e.g., objective/equitable KSAs, requirements, education/experience)
2. Collect DEI data (e.g., workforce demographics, engagement, surveys)
3. Analyze DEI data (e.g., identify trends, pipeline representation, threats/barriers/opportunities)
4. Determine impact of legislation on organizational DEI initiatives (e.g., local, national, international)
5. Educate organization on impact of legislation on DEI initiatives
6. Participate in risk-management planning to address emerging DEI-related issues
7. Provide DEI input in development of organizational code of ethical standards
8. Vet organizational third-party services/resources for compliance with DEI business standards/practices (e.g., suppliers, vendors, consultants)
9. Promote existing organizational structures that support DEI (e.g., ERGs, employee engagement processes, best practices)
10. Develop organizational policies/procedures to reflect DEI principles (e.g., anti-harassment, anti-bullying, anti-discrimination)
11. Support consistent application of organizational DEI policies/procedures
12. Conduct equity audits of organizational units/divisions/depts for meeting engagement and DEI objectives
13. Recommend interventions for organizational units/divisions/depts not meeting engagement and DEI objectives
14. Verify performance measures are objective and equitably applied to all roles
15. Conduct accessibility audits of organization (e.g., internal/external facilities, signage, technology)
16. Develop flexible job designs to accommodate employee needs (e.g., proactive, family, health)
17. Coordinate with legal/HR on organizational compliance with DEI-related legislation (e.g., ADA/EEO/AA, domestic law, international law)
18. Partner with legal/HR/other groups/depts to resolve DEI-related complaints/grievances (e.g., unions, Work Councils)

**DOMAIN E: CHAMPION ORGANIZATIONAL VALUES AND INCLUSIVE CULTURE- 22%**

1. Promote an inclusive workplace culture
2. Promote organizational DEI behavior standards and expectations
3. Create inclusive environment for engagement in crucial DEI conversations (e.g., psychological safety, conscious inclusion, virtual/F2F)
4. Model values and behaviors for crucial DEI conversations (e.g., curiosity, active listening)
5. Coach organizational staff on appropriate modes of engagement in DEI topics (e.g., curiosity, respect, active listening)
6. Develop plans for constructively addressing generational trends in DEI activism and social responsibility
7. Facilitate access, engagement, and representation within organizational structures (e.g., policies, practices, programs)
8. Model innovation and disruption through diversity of thought (e.g., experimentation, collaboration, problem solving)
9. Resolve actual and perceived DEI conflicts (e.g., encounters, jokes, comments)

**DOMAIN F: ADVANCE ORGANIZATIONAL STAFF EDUCATION, DEVELOPMENT, & TRAINING- 12%**

1. Evaluate DEI education, training, and development resources (e.g., staff, curricula, assessments)
2. Identify learning strategies that support DEI skill-building and systemic change (e.g., organizational level, individual learning journeys, curriculum maps)
3. Develop DEI education, training, and development in alignment with identified learning strategies (e.g., format, methods, content)
4. Verify selection criteria for educational opportunity/T&D program participants (e.g., objective vs. subjective, equity audit/access)
5. Develop staff coaches/facilitators/trainers (e.g., train-the-trainer, build capacity, QA)
6. Support delivery of DEI organizational development activities (e.g., staff, executives, board)
7. Facilitate DEI education, development, and training activities
8. Provide DEI competency coaching across organizational levels (e.g., executives, managers, staff)
9. Monitor organizational implementation of staff education, development and training plans
10. Evaluate efficacy of staff education, development and training
11. Contract with external providers to provide staff education, development and training
12. Promote staff awareness of DEI learning resources (e.g., libraries, webinars, services)
13. Integrate DEI concepts into staff feedback process and development plans (e.g., reviews, dialogue, informal)

**DOMAIN G: LEVERAGE DEI STAKEHOLDERS & PARTNERSHIPS - 3%**

1. Build relationships with internal stakeholders to drive internal diversity-related initiatives (e.g., work councils, unions)
2. Build relationships with external stakeholders to drive internal diversity-related initiatives (e.g., Tribal governments, FBOs)
3. Cultivate robust partnerships with organization’s ERGs to enrich perspectives
4. Represent organization in the community/industry
5. Develop community partnerships that support organizational DEI projects/plans/initiatives and business strategies (e.g., sourcing/recruiting, social responsibility, mentorship)
6. Partner with organizations to develop educational programs that support DEI regionally (e.g., business, NGOs, CBOs)
7. Provide guidance to local WFD board leadership on engaging underrepresented groups
8. Promote awareness of DEI-related resources and support services (e.g., govt/non-profit agencies, PFLAG, legal aid)
9. Consult with innovative industry thought leaders to drive current/future DEI initiatives and position organization as leader in DEI best-practices
10. Develop internship programs with local community educators (e.g., tech schools, colleges)
DOMAIN H: LEAD ORGANIZATIONAL DEI INITIATIVES & INTEGRATION EFFORTS - 2%

1. Define standardized DEI vocabulary and terminology
2. Establish organizational ERGs/BRGs
3. Manage ERG/BRG initiatives (e.g., grow, develop, provide strategic direction)
4. Develop organizational communications review committee to evaluate content/materials through a DEI lens (e.g., webpages, social media, print/visual)
5. Collaborate with internal/external partners on DEI content development (e.g., products, services, trainings/interventions)
6. Review DEI impact of how organizational products/services are designed, produced, and marketed
7. Pilot staff/volunteer engagement techniques (e.g., virtual/hybrid, inclusivity, breakouts)
8. Monitor supplier diversity initiatives (e.g., collect data, success rates, accountability)
9. Coordinate cultural competency education programs for third parties (e.g., vendors, consultants, independent contractors)
10. Cultivate integration of organizational cultures throughout merger/acquisition process
11. Collaborate across organizational dept/division to build DEI infrastructure within their respective departments (e.g., feedback mechanisms, consistent communication, supports)
12. Develop virtual/hybrid DEI community
13. Maintain DEI resource directory (e.g., standardized terminology/vocabulary, manuals, articles)
14. Coordinate individual personal betterment programs (e.g., work/life fit, wellness, caregiver support)
15. Co-develop recruiting events to support career transitions (e.g., working parents, veterans/active military, prison re-entry)
16. Support career development programs for individuals transitioning from declining professions (e.g., timber, coal, outsourced)
17. Coordinate with internal partners to implement organizational social responsibility initiatives
DOMAIN I: COLLABORATE ON DEI ORGANIZATIONAL COMMUNICATIONS & ENGAGEMENT - 6%

1. Create DEI communication and engagement strategies
2. Engage with executive leadership to communicate link between organizational values and DEI strategy internally/externally
3. Conduct DEI audit of internal/external communication and engagement methods (e.g., website/social media, marketing materials, training resources)
4. Review organizational communication and engagement messaging for accessible formats and language (e.g., employee handbook, announcements, website)
5. Review signage and documents to remove restrictive language (e.g., "handicapped", gender-specific)
6. Provide translation resources (e.g., cultural, language, interpretation services/VRI for ASL)
7. Drive DEI-related messaging campaigns (e.g., radio/audio, social media, print/visual)
8. Respond to staff DEI inquiries/issues
9. Coordinate with internal partners on crisis communications (e.g., criteria, messaging, delivery)
10. Coordinate messaging between ERG/BRG and corporate leadership
11. Relay information about diversity initiatives, events, progress internally and externally
B. Recommended Study Resources

**Boardroom Diversity**


Conmy, S. (2022). *Boardroom Skills – Do you Have What it Takes to Join a Board?* [https://www.thecorporategovernanceinstitute.com/insights/guides/do-you-have-these-boardroom-skills/](https://www.thecorporategovernanceinstitute.com/insights/guides/do-you-have-these-boardroom-skills/)


Connecting Demographic Shifts to Organizational Strategy


Executive Commitment, Engagement, and Sponsorship

Diversity Best Practices. Top Five Ways CEOs Show Commitment to Diversity. (n.d.).
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**The Next Generation of Diversity, Equity, and Inclusion Work**


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## C. Recertification Credit Advisor

<table>
<thead>
<tr>
<th>Activity</th>
<th>Credit</th>
<th>Sample Descriptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Continuing Education</td>
<td>• 3 recertification credits for each college/university course&lt;br&gt;• 6 recertification credits per full-day conference (6-8 hour event)&lt;br&gt;• 1 recertification credit per hour of instruction for webinars, seminars, or workshops</td>
<td>Diversity courses at an accredited college or university; conferences; workshops, seminars or webinars offered by professional associations; Equal Employment Opportunity Commission, state Human Rights Commission, professional association, law firm or other seminars.</td>
</tr>
<tr>
<td>Speaking &amp; Instructing</td>
<td>• 1 recertification credit for every one (1) hour of facilitation or instruction&lt;br&gt;• 2 recertification credits for reviewing a Candidate Project or facilitating a CDE/CDP prep course</td>
<td>Keynote/workshop presentations; instructing a course in diversity; speaking engagements to students or professionals on the topic of diversity and inclusion; peer reviewing a Candidate Project; or facilitating a CDE/CDP prep course.</td>
</tr>
<tr>
<td>On the Job Experience</td>
<td>• 1 recertification credit for every hour spent developing a new diversity and inclusion intervention at work. (You may show time in 15-minute increments, e.g., 1.00, 1.15, 1.30, 1.45).</td>
<td>Design a new strategic diversity plan; establish a new supplier diversity program; develop new diversity training curriculum; create a new succession plan for the Office of Diversity and Inclusion; or launch a new multicultural marketing campaign.</td>
</tr>
<tr>
<td>Research &amp; Publishing</td>
<td>• 1 recertification credit for every hour spent researching, writing and editing. (You may show time in 15-minute increments, e.g., 1.00, 1.15, 1.30, 1.45).</td>
<td>Write, co-author or edit a book on the subject of diversity; publish an article in a journal or periodical; write a blog on a timely diversity and inclusion issue; conduct significant research in the field of diversity outside of the workplace; or contribute to CDE/CDP curriculum updates.</td>
</tr>
<tr>
<td>Professional Memberships</td>
<td>• 4 credits for the Society for Diversity&lt;br&gt;• 3 credits for SHRM, NAAAHRC or other national / international organizations&lt;br&gt;• 2 credits for statewide or local organizations</td>
<td>Annual membership with the Society for Diversity, SHRM, NAAAHRC, or other national or international organization with a focus on diversity; or membership in a state/local diversity organization (Note: Credit is calculated annually. For example, if a designee maintains a membership with the Society for Diversity for 2 years, then the recertification credit is 8 hours).</td>
</tr>
<tr>
<td>Leadership &amp; Recognition (Outside of the Workplace)</td>
<td>• 1 credit per hour up to a maximum of 10 credits per activity per year; Subtract all non-educational time from the full length of the activity; you may show time in 15-minute increments, e.g., 1.00, 1.15, 1.30, 1.45</td>
<td>Board positions; chairing a committee, conference or task force on diversity; testifying before Congress or state legislators on the subject of diversity; mentoring; or winning an award for diversity and inclusion.</td>
</tr>
<tr>
<td>Book Reviews</td>
<td>• 3 credits for a DEI book review completed; 2 credits for reading the book indicated and 1 credit for a 2-3 paragraph summary of the book.</td>
<td>Read an assigned book within a book club that is DEI focused/driven; read a DEI book individually and write a 2-3 paragraph summary.</td>
</tr>
</tbody>
</table>
D. Code Of Ethics

Employers and clients insist on the highest possible standards of personal integrity, professional competence, sound judgment, and discretion. Thus, Candidates must agree to the Institute for Diversity Certification's Code of Ethics, which describes the behavior expected of diversity professionals or executives. Developed by the profession for the profession, the Code of Ethics is the public declaration of a diversity leader's obligations to themselves, their profession, and society at large. The Code follows.

I strive to:

- Identify my own biases and actively work to manage them
- Examine my own cultural values and avoid imposing those values on others
- Avoid stereotyping by race, gender, age, religion, ethnicity, geography, sexual orientation, gender identity, disability, mental health/neurodiversity, physical appearance, class/income, social status or other unique characteristics
- Recognize the rights and dignities of each individual to be treated fairly
- Promote inclusion and the removal of barriers for all groups
- Demonstrate excellence in my work, work products, and leadership
- Provide the highest level of quality in diversity management by applying industry-best practices, strategic insights, and/or compassionate engagement
- Do what I can to help my senior management, business partners, co-workers, direct reports, and/or clients eliminate biases, stereotypes, harassment and discrimination
- Comply with all Equal Opportunity laws in my jurisdiction and other regulations governing my position and the industry
- Keep informed of pertinent knowledge and research in the field of diversity, equity and inclusion
- Maintain confidentiality and integrity in the practice of my profession
- Support my peers and avoid conduct that impedes their work
- Conduct myself in an ethical and honest manner
- Seek and Disseminate the Truth, and Implement It Appropriately
- Be honest, fair and courageous in understanding, presenting and interpreting information
- Test the accuracy of information from all sources and exercise care to avoid inadvertent error
- Prevent deliberate distortion
- Make certain that diversity information and promotional materials, photographs, audio (including sound bites), videos, graphics, and data are not misrepresented, including using information out of context, intentionally misstating numbers, writing misleading or erroneous reports, posting/sharing fake news via social media, or over exaggerating diverse representation/offensive language/toxic situations at work
- Tell the story of inclusion and of human experience boldly, even when it is unpopular or professionally risky
- Advocate for the voiceless and disenfranchised; every voice should be equally valid
- Support accountability, transparency, courage, and an overall healthy workplace culture
- Fairly and accurately represent my diversity credentials, qualifications, experience, and ability
E. Standard Of Practice

CDP® and CDE® Designees believe that public enlightenment is the forerunner to equity and the foundation of inclusive excellence. Accordingly, conscientious champions from all workplaces and specialties must strive to serve the public with thoroughness and honesty. Integrity must serve as the cornerstone of the diversity leader’s credibility. Designees should share a dedication to ethical behavior and adopt this code to declare the Institute’s principles and standards of practice.

The IDC Standard of Practice is voluntarily embraced by thousands of diversity leaders around the world, regardless of title, industry, or platform, and is widely used in workplaces and cultures as a guide for ethical behavior. The code is intended not as a set of "rules" but as a resource for ethical decision-making and as a standard for professional work in this field. The code consists of these essential practices:

Minimize Harm
Ethical Diversity Professionals treat each other and employees/patients/students/citizens/clients as human beings deserving of respect. Diversity Professionals should seek to “do no harm”, including but not limited to:

- Showing compassion for those who may be different from you; using special sensitivity when dealing with children, inexperienced sources or complex issues.
- Being empathetic when presenting, interviewing or photographing those affected by tragedy, trauma, or grief.
- Recognizing that gathering and presenting information may cause discomfort or denial. The pursuit of the truth and/or solutions is not a license for arrogance.
- Accepting that private people have a greater right to control information about themselves than do public officials and others who seek power, influence or attention. Only an overriding public need can justify intrusion into someone’s privacy.

Act Independently
Diversity Professionals should be free from any conflicts of interest. Diversity Professionals should:

- Avoid conflicts of interest, real or perceived.
- Remain free from associations and activities that may compromise integrity or damage credibility.
- Refuse gifts, favors, fees, free travel and special treatment, as well as shun serving as a consultant, at organizations who compromise diversity integrity or want you to endorse inequitable treatment.
- Disclose unavoidable conflicts.
- Be watchful and courageous about holding those with power accountable.
- Deny favored treatment to, and resist pressure from, employers, clients, sponsors, advertisers, investors, and others who seek to use your influence to contradict or otherwise invalidate diversity, equity, inclusion, justice, and accessibility.
- Be wary of sources offering information for favors or money.

Be Accountable
Diversity Professionals are accountable to their clients, colleagues, employers, employees, and each other. Diversity Professionals should:

- Clarify and explain conflicts of interest, and invite dialogue from the public regarding professional conduct.
- Encourage the public to voice grievances against the diversity profession.
- Admit mistakes and correct them promptly.
- Expose unethical practices of diversity professionals and other colleagues.
- Abide by the same high standards to which we hold others.
F. CDE® Examination Fees

<table>
<thead>
<tr>
<th>Description of Fees</th>
<th>Fee</th>
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<tbody>
<tr>
<td>Examination only</td>
<td>$599</td>
</tr>
<tr>
<td>Online: Prep Course, Study Guide &amp; Examination</td>
<td>$4,139</td>
</tr>
<tr>
<td>Self-Study: Study Guide &amp; Examination</td>
<td>$2,040</td>
</tr>
<tr>
<td>Study Guide Only</td>
<td>$1,696</td>
</tr>
<tr>
<td>Package Option: Become a Society for Diversity Member</td>
<td>$169</td>
</tr>
<tr>
<td>(Save when you get certified and become a member at the same time; value: $345)</td>
<td></td>
</tr>
<tr>
<td>Recertification Fee</td>
<td>$50</td>
</tr>
<tr>
<td>Exam Change Fee</td>
<td>$350</td>
</tr>
<tr>
<td>Returned Checks Fee</td>
<td>$35</td>
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<tr>
<td>Retest Fee</td>
<td>$599</td>
</tr>
<tr>
<td>Regrading of Exam Fee</td>
<td>$35</td>
</tr>
<tr>
<td>Certification Lapse Fee</td>
<td>$250</td>
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</tbody>
</table>

**Description of Fees**

Test fees and related materials are for a one-time sitting only. The Institute for Diversity Certification (IDC)® provides discount codes that can be used to achieve greater savings. Candidates may only use one Promo Code at a time. Special Promo Codes cannot be used retroactively, or past the expiration date.

All certification program options include access to the CN Learning Management System.

**Refund Policy**

Candidates who withdraw from a prep course/self-study/study guide only program within 14 days of their registration date may receive a refund, minus a $500 processing fee. No refunds will be provided, for any reason, after 15 days have expired. Also, IDC recertification, exam change, exam only/retest, and Society for Diversity membership fees will not be refunded. Candidates may choose to reschedule or make a substitution within the year without being charged a fee. If a substitution is made after twelve months have expired, the $350 Exam Change Fee shall apply. Allow up to thirty (30) days for refund processing.