the Axela group

First Edition

Diversity, Equity Inclusion & Belonging

Action Toolkit for Operators

BROUGHT TO YOU BY
THE SENIOR LIVING DEIB COALITION

CURATED AND DESIGNED BY THE AXELA GROUP

PUBLISHED NOVEMBER 2022

About The Senior Living Industry DEIB Coalition

Argentum, the American Seniors Housing Association (ASHA), and the National Investment Center for Seniors Housing & Care (NIC) formed the Senior Living DEIB Coalition in January 2022 to unite and advance a commitment to diversity, equity, inclusion, and belonging (DEIB) in senior living. Not only do we believe that DEIB efforts are the right thing to do, but data from several studies tell us that organizations that engage in DEIB initiatives perform better, are more innovative, and manage risk more effectively, and that in turn helps to provide the best outcomes for the residents and staff of our senior living communities as well as staff in our respective corporate offices.

With that, the Senior Living DEIB Coalition is pleased to provide the resources enclosed in this DEIB Toolkit. These resources, while developed with a focus on operators, can be used to either augment or launch DEIB efforts of organizations throughout the senior living industry. Together, with action, we can positively impact diversity, equity, inclusion, and belonging to strengthen and support our employees and the older adults we serve.

Sincerely,

ARGENTUM
EXPANDING SENIOR LIVING

asha
American Seniors Housing
ASSOCIATION

NIC

Calling the effort "critical to future," leaders seek fellow professionals to co-create strategy and action plan

-Senior Living Industry DEIB Coalition Press Release, January 2022

Co-Creation Partners

Ferguson Partners

Specializing in board, executive recruitment, and business advisory services, Ferguson Partners delivers premier strategic solutions to the seniors housing, healthcare, real estate, real assets, technology, retail, and hospitality sectors. Our global teams specializing in executive recruitment, management consulting, compensation consulting, and leadership development serve clients in our sector specialties. Our colleagues commit to understanding your business's unique needs and advancing its success. Our boutique firm has nine offices worldwide, dedicated to offering personalized client services and integrated talent management solutions.

The goal is to co-create a plan of action and strategy around DEIB, including the development of resources that inform, equip, and catalyze positive impact and thinking around DEIB.

-Senior Living Industry DEIB Coalition Press Release, January 2022

The Axela Group is a certified small, women-owned consulting firm that offers customized organizational impact consulting and coaching for mid- to large-size organizations, associations, social businesses, and nonprofits who are transforming themselves and the systems in which they operate for good.

With core competencies in coaching, culture, transformational change, instructional design and facilitation, diversity & inclusion, and organizational effectiveness, we put all of these together to create meaningful and impactful shifts for individuals, organizations and communities.

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Introduction

The following guide was created to help Senior Living Community Operators initiate conversations and approaches to diversity and inclusion in their unique businesses.



It is important to note...
The content provided in this guide serves as a starting point for you to begin laying the foundations of your DEIB learning for yourself and for your operation.

We highly encourage you to...
Align with and leverage resources provided by your parent company if your operation is part of a larger corporation

Reach out to the office(s)/center(s) listed within these pages and in linked resources to find additional resources, facilitated training opportunities, and learning tools to further your DEIB journey.

Introduction

THE WHY BEHIND THE TOOLKIT

Diversity + Inclusion = Better Business Outcomes

2X
as likely to meet or exceed financial targets

8X
more likely to achieve better business outcomes

But 67% of leaders struggle to prioritize DEIB due to pressure for short-term results. (WEF 2019)

THE WHO THE TOOLKIT SUPPORTS

Operators of Senior Living Communities

trying to achieve business goals

striving to attract, retain, and promote top talent

leading and advocating for DEIB

THE HOW TO DRIVE ACTION

Access to practical tools and resources in four steps

1 SEE

2 CONSIDER

3 ADAPT

4 NEXT LEVEL

Co-creation Process

Step 01

DISCOVER

Discovery Interviews with Senior Living Industry Leaders

State of DEIB in Senior Living Industry Survey

Volunteer Working Group: Operator DEIB Needs Assessment

Step 02

CO-CREATE & CURATE

Volunteer Working Group: Design Recommendations

Strategic Partners in DEIB provided research, tools and resources

Step 03

DESIGN

Made for Senior Living Community **Operators:**

- straight-forward tools
- applicable to all levels of organizational DEIB maturity
- scalable approaches to suit different resource capacity and budget variability
- available in English

Step 04

DELIVER & ENGAGE

Deliver via the Senior Living DEIB Coalition's broad and deep networks

The Senior Living DEIB Coalition creates the platform for continued engagement around DEIB in the industry

SCAN™ Overview

The Axela Group's SCAN Framework:

Today's complexity and pace of change demand resilience, agility and change-intelligence. Use SCAN to help you make change at the human, team, organization and community levels.



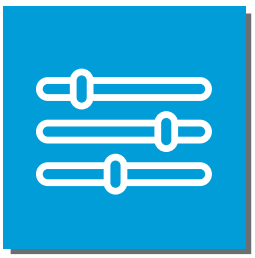
SEE

You can't change what you can't **SEE**. This section has tools to explore the case for change and envision the future for your community.



CONSIDER

Once you SEE where you are and where you want to go, **CONSIDER** these practical tools to support DEIB education and awareness.



ADAPT

The tools in this section will help you **ADAPT** your workplace to be more inclusive and make sustainable tweaks to your existing processes.



NEXT LEVEL

Sustaining your efforts takes planning, engagement, measurement, and new habits. Use these tools to support you for the long haul and take it to the **NEXT LEVEL**.

Getting Started with SCAN™

Use this checklist to walk through the steps to build your DEIB plan

SEE



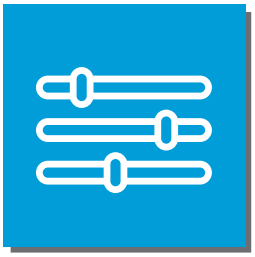
- [ ] Complete your DEIB Organizational Maturity Assessment
- [ ] Identify 2-3 areas where you can move forward in the DEIB Spectrum (e.g., Leadership, Policies, Diversity, Training)
- [ ] Draft your Organizational DEIB Statement

CONSIDER



- [ ] Develop your own DEIB Awareness - choose education tools to help yourself
- [ ] Develop DEIB Awareness and knowledge in your organization - choose education tools and tactics to help others

ADAPT



- [ ] Understand why diversity programs fail, and plan mitigations for your program, so it is successful.
- [ ] What small, but meaningful ways can you build DEIB into how work happens?
- [ ] Assess the structures to support DEIB - what do you have? What do you need?

NEXT LEVEL



- [ ] Determine how you will engage others in the DEIB Journey
- [ ] Identify outcomes-based measures
- [ ] Build your SMART action plan

SEE:
THE CASE FOR CHANGE



You can't change what you can't SEE. This section has tools to explore the case for change and envision the future for your community.

10 How DEIB Enhances Business Outcomes

11 5 Myths about Diversity, Equity and Inclusion

12 DEIB Organizational Maturity Model

13 DEIB Organizational Maturity Assessment

14 Establishing Your DEIB Statement

How DEIB Enhances Business Outcomes

Data shows that Embracing Diversity, Equity, Inclusion and Belonging in the workplace is more than a trend, it's a **must** that yields positive business results. With challenges such as the Great Resignation, quiet quitting, and a fast growing and more diverse aging population, operators of Senior Living Communities need to act now to capitalize on opportunities that having a more diverse and inclusive workforce enables.

Employee Engagement

When employees feel valued and included, they give more discretionary effort.

Engagement is higher in organizations with strong inclusion. (Quantum Workplace, 2020)

Innovation

Diverse ideas and approaches fuel innovation.

Inclusive companies are 2.9 times more likely to lead in innovation. (Josh Bersin, 2021)

Retention

Companies with inclusive practices reduce turnover.

Companies with active DEIB cultures have 4% turnover than those without. (McClean & Company Trends Report, 2020)

Profitability

The top three boxes contribute to profitability.

Companies with top cultural and ethnic diversity were 36% more likely to outperform peers on EBIT Margin. (McKinsey, 2020)

Future-Proof

The nation's older population is growing and becoming more diverse. (US Census, 2017)

Employees at more diverse companies are 70% more likely to report that their firm captured a new market. (CTI, 2013)

Attract Talent

Today's talent pool wants work satisfaction AND wants their work to reflect the community they work in.

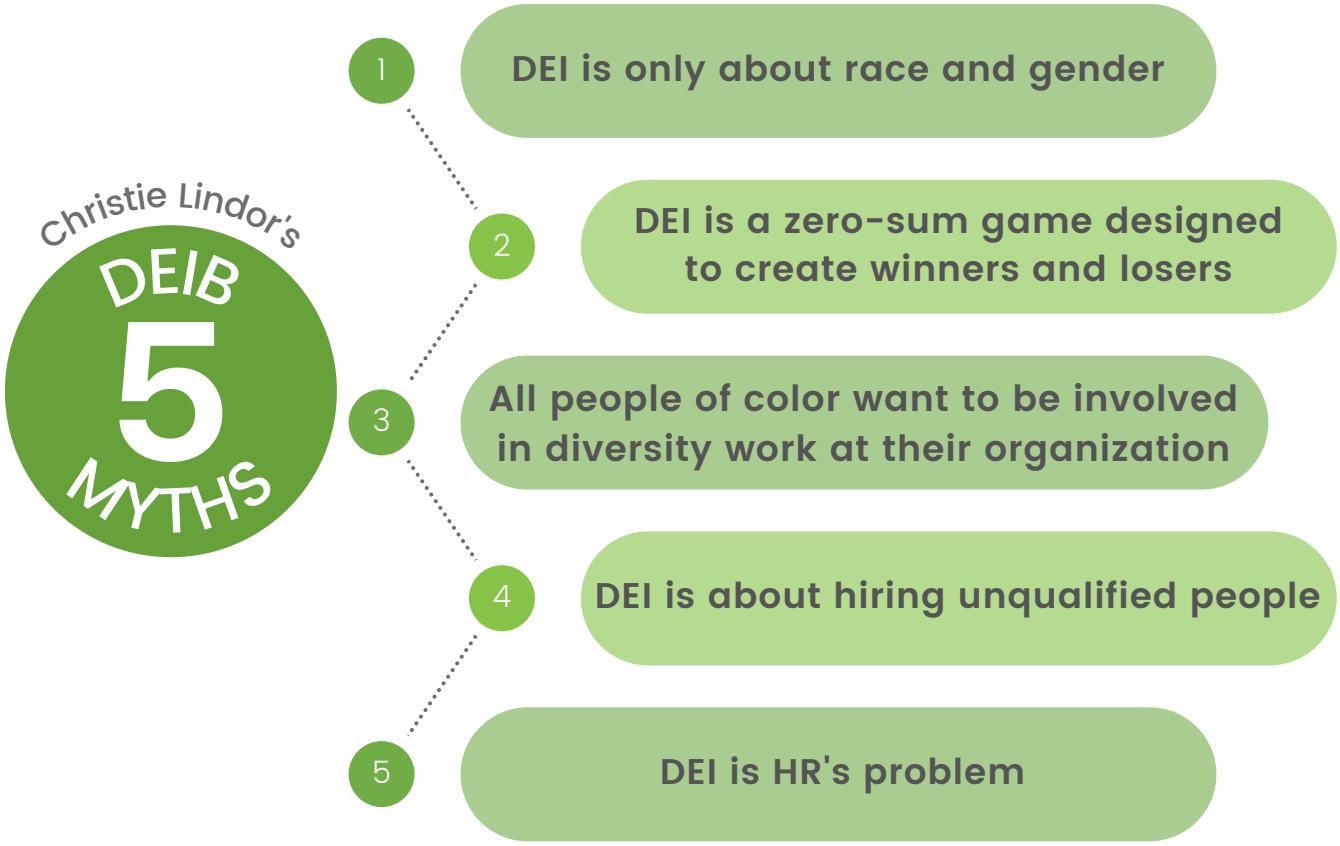
76% of job seekers weigh diversity as a factor as they seek employment (Glassdoor, 2021)

More Information

- Elevating Equity: The Real Story of Diversity and Inclusion. - Josh Bersin
- Diversity Wins: How Inclusion Matters. - McKinsey & Company
- 6 Diversity and Inclusion Statistics You Need to Know [+Takeaways] - Quantum Workplace
- What Job Seekers Really Think About Your Diversity and Inclusion Stats - Glassdoor

5 Myths About Diversity, Equity & Inclusion

There are a lot of misconceptions about Diversity, Equity and Inclusion. In order to unleash the benefits of DEIB, we first need to talk about what it is, and what it is not. To help with that, Christie Lindor, Workplace Culture & Inclusion Strategist and CEO of Tessi Consulting, shares 5 myths that she believes need to be unlearned about diversity, equity and inclusion.



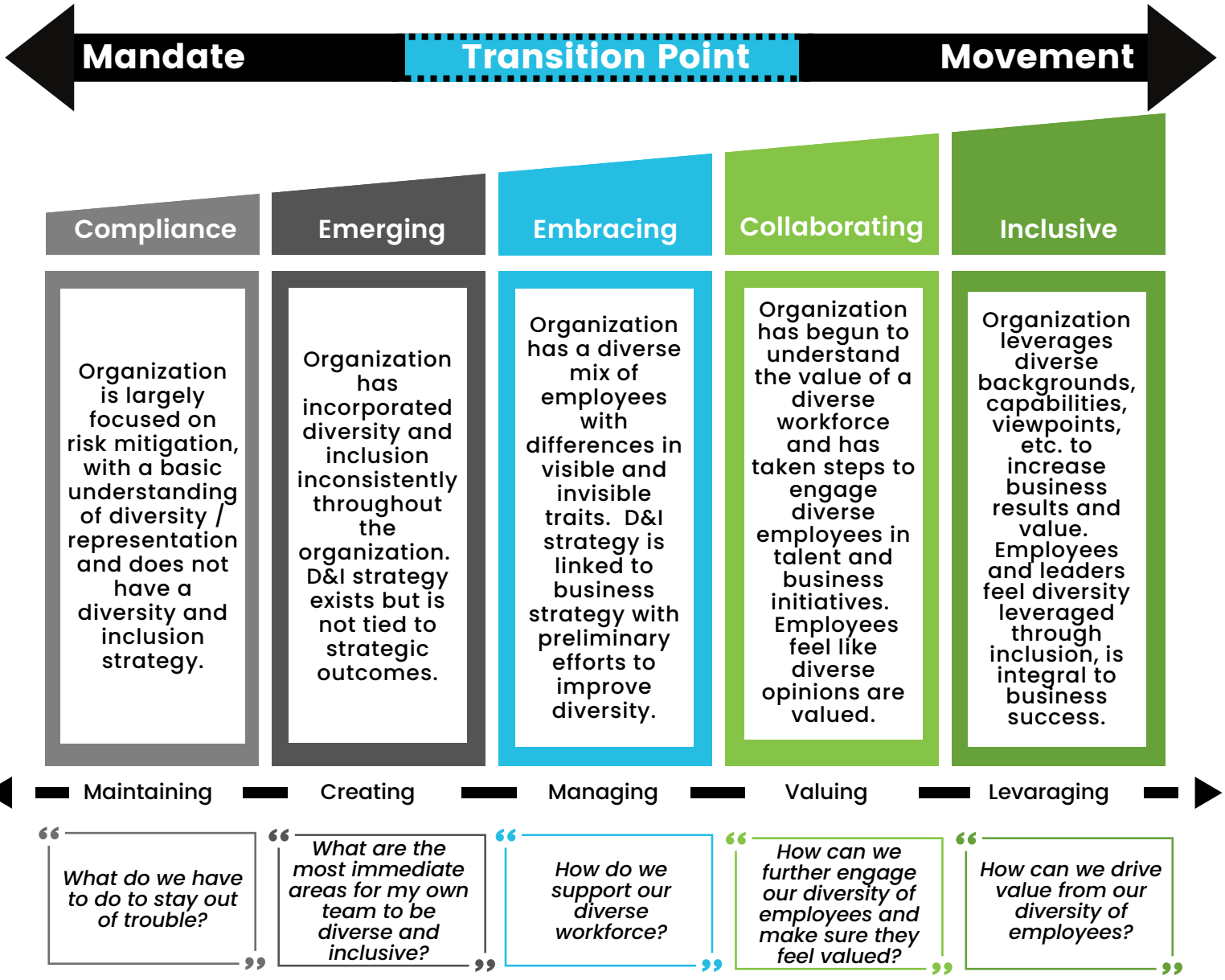
Watch the Video

Diversity, equity, and Inclusion isn't What You Think - Christie Lindor, TEDxBentleyU

DEIB Organizational Maturity Model

Know where you are at a glance. Every organization has to start somewhere, and not every organization is at the same starting point.

The Deloitte Diversity and Inclusion Maturity Model can help you to understand where your organization is today in terms of five DEIB maturity levels, so you can start where you are on your way to being a fully inclusive organization.



(Source: Maurelli, April 2020)

DEIB Organizational Maturity Assessment

Take a more detailed look at where your organization is on the DEIB journey with this comprehensive assessment from Meyer Memorial Trust. The Diversity, Equity, and Inclusion (DEI) Spectrum Tool helps assess where an organization is on its DEI journey so you can identify potential areas for future work.

The spectrum consists of five points:

01	02	03	04	05
Not Yet Started	Ready to Start	Launched	Well on the Way	Exemplary /Leading

Meyer's tool describes organizational components at different points along the DEI continuum for twelve dimensions of DEI work:

01. DEI Vision	07. Diversity
02. Commitment	08. Data
03. Leadership	09 Community
04. Policies	10. Decisions
05. Infrastructure	11. Accountability
06. Training	12. Inclusion



Access the tool

Meyer DEI Spectrum Tool 2018 - Meyer Memorial Trust

Establishing Your DEIB Statement

An effective DEIB Statement is an extension of your organization's mission, vision and values.

It is what you want to say about what Diversity, Equity, Inclusion and Belonging means to your workplace, why it matters (today and in the future) and how your organization is practicing DEIB.

Make Your DIEB Statement Meaningful

DO

Tie in Mission, Vision and Values

Anchor your statement in what makes your organization special

Be Authentic

An authentic DEIB statement connects people to your commitment

Engage Employees

Ask for employee's input and include them in the statement's design

Take Action

Your statement should show up in processes like hiring, performance reviews, and marketing

DON'T

Don't be Wishy-Washy

Be clear about what you want to say about DEIB and your business to employees and customers

Be Non-Committal

Be prepared to take action on the words you say

Overcomplicate It

Simple, powerful statements backed by action make a difference

Forget to Check and Adjust

Implement success measures, check them regularly and revisit your statement annually



Learn How To Write Your DIEB Statement

Writing a Diversity and Inclusion Statement: How to Get It Right
- Emily Heaslip, US Chamber of Commerce

CONSIDER:
EDUCATION TOOLS

Once you SEE where you are and where you want to go, CONSIDER these practical tools to support DEIB education and awareness.

16 Foundational Terms

18 What makes up identity?

19 Self-Assessments

20 Tactics for More Inclusive Workplaces

23 Active Allyship

Foundational Terms

Having general awareness to and a shared understanding of the terms used when talking about Diversity, Equity, Inclusion and Belonging makes the topic of DEIB more approachable. Take the time to browse these terms and share them with others in your organization to align on the "what" and the "why" behind this effort. This list is not comprehensive, but is meant as a starting point for communication and learning.

DIVERSITY

the presence of people with differences across dimensions such as gender, age, race/ethnicity, socioeconomic upbringing, sexual orientation and others

INCLUSION

the practice of acknowledging and valuing people's differences to enrich or shift social planning, decision making and quality of life for everyone

EQUITY

the practice of ensuring that processes and policies are impartial, fair and enable equal access to opportunities for every individual

EQUALITY

resources are provided exactly the same to all (same resource, same amount, etc.)

BELONGING

the feeling of security and support when there is a sense of acceptance, inclusion and identity for a member of a certain group

ACCESSIBILITY

giving equitable access to everyone along the continuum of human ability and experience

INTERSECTIONALITY

the way in which the effects of multiple forms of discrimination (such as racism, sexism, and classism) combine, overlap, or intersect especially in the experiences of marginalized individuals or groups.

Foundational Terms

RACISM

a belief that racial differences produce or are associated with inherent superiority or inferiority; prejudice, discrimination, or hatred on the basis of race

MICROAGGRESIONS

verbal, physical or symbolic slights or insults, whether intentional or unintentional

BIAS

inclination or preference that interferes with impartial judgement

CONSCIOUS BIAS

attitudes or beliefs someone knowingly holds (is aware of, and expresses them directly)

UNCONSCIOUS BIAS

automatic or unintentional associations that may not directly correlate with an individual's beliefs or values (expressed indirectly; implicit association

INTERSECTIONALITY

the way in which the effects of multiple forms of discrimination (such as racism, sexism, and classism) combine, overlap, or intersect especially in the experiences of marginalized individuals or groups.

ALLY

a person who is not a member of a marginalized or disadvantaged group but who expresses or gives support to that group; a person who uses their privilege to advocate on behalf of members of an oppressed population through a wide variety of behaviors in all aspects of their life

What makes up identity?

Only a small portion of an iceberg can be seen above the waterline. Similarly, understanding someone's identity is limited by what we see on the surface. **Avoid making assumptions about others based on bias and stereotypes by seeking to understand personal and group identities.**



CLOTHING / ATTIRE

PHYSICAL APPEARANCE

ABOVE THE WATERLINE

MARITAL STATUS

RACE

GENDER

AGE / GENERATION

RELIGION/SPIRITUALITY

SOCIOECONOMIC STATUS

ABILITIES/DISABILITIES

AT THE WATERLINE

NATIONALITY

INTERESTS

LANGUAGE

ETHNIC BACKGROUND

SEXUAL ORIENTATION

HOBBIES

BELOW THE WATERLINE

HEALTH

CAREER

POSITION

EDUCATION

FAMILY ROLES

GEOGRAPHIC ORIGINS

Self-Assessments

Inclusive Leadership

Chart yourself along three core competencies:
Developing Awareness, Embracing Inclusive Practices,
Creating an Inclusive Culture

Assess: How Inclusive Are You as a Leader? (Chart Framework)

Harvard Business Publishing,
from "The Three A's of Inclusion: Awareness, Authenticity and Accountability"
Webinar Recording

Examine what strengths and areas of opportunity you have
in the categories of *leading outward* and *leading inward in service of building inclusive workplace environments*.

Take a Quiz: Are You an Inclusive Leader? (Online test)

Catalyst, Feb 2020

Implicit Social Attitudes (Bias)

This assessment creates the opportunity to gain awareness
to implicit (unconscious) biases or preferences which may lead to
unintended negative consequences.

Take A Test: Implicit Association Test

There are 15 topics within Project Implicit Social Attitudes Test:
Race, Weapons, Disability, Gender-Science, Native American, Presidents, Arab-Muslim,
Age, Asian American, Weight, Religion, Transgender, Sexuality, Gender-Career, Skin-tone

Project Implicit is a 501(c)(3) non-profit organization and international collaborative of researchers who are interested in implicit social cognition. The mission of Project Implicit is to educate the public about bias and to provide a "virtual laboratory" for collecting data on the internet.

Tactics for More Inclusive Workplaces

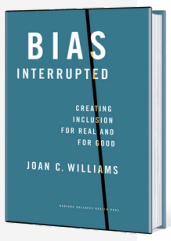
We all have implicit biases which affect the way we live and work in the world. Identifying how these biases may negatively affect team members and the bottom line is pivotal in the development of more inclusive workplaces.

Resource	Description
Implicit Bias | Concepts Unwrapped: ***Video***	View the Video This 9 minute video from the McCombs School of Business unwraps the concepts of implicit bias in an engaging and accessible format
Implicit Bias | Concepts Unwrapped: ***Discussion Guide***	Engage team members in thoughtful discussion by leveraging the discussion questions and case study provided by the McCombs School of Business. Discussion Questions
Ground Rules for Inclusive Meetings	View the Ground Rules Adapted from Eric Law and the Kaleidoscope Institute The tone set in meetings can make a big difference when it comes to enabling people to feel safe to share their point of view. Open meetings with these ground rules so all voices can be heard, and to set the stage for curiosity and listening.

Tactics for More Inclusive Workplaces

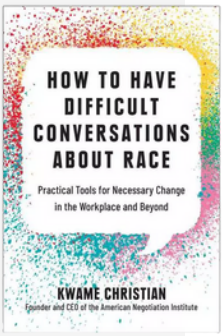
Small tweaks to how you operate can make a big change when it comes to correcting and preventing bias at work. These BIAS INTERRUPTERS are shifts in basic business systems -- such as hiring, performance evaluations, promotions, and compensation -- that prevent implicit bias in the workplace, often without ever even talking about bias.

Resources on this page curated from WorkLife Law

Toolkit	Description
Bias Interrupters: ***Toolkit for Organizations***	[View the Online Toolkit] Don't abandon current systems -- tweak them, for big shifts. Check out the toolkit to explore shifts you can make. • Performance Evaluations • Hiring & Recruiting • Assignments • Meetings • Compensation • Flexibility • Family Leave • Hybrid Work • Retention
Bias Interrupted: **Creating Inclusion for Real and For Good** by Joan C. Williams	[Read the Book Summary] "Clear and convincing guide for how to systematically attack bias in your organization's practices." - Charter Works Inc. 
Bias Interrupters: ***Toolkit for Managers***	[View the Online Toolkit] Learn how the best bosses interrupt bias on their teams with this toolkit for managers. • Performance Evaluations • Hiring & Recruiting • Assignments • Meetings • Flexibility • Family Leave [Read the Article]

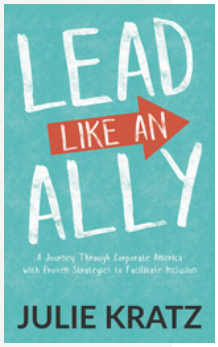
Tactics for More Inclusive Workplaces

Resources on this page provided by the American Negotiation Institute

Resource	Description
Inclusive Communication: ***Checklist***	[View the Checklist] Supporting Podcast: [How Inclusive Language Can Benefit Your Business and Life] Guest Contributor and Author: Alissa Carpenter, M. Ed
How to Have Difficult Conversations About Race: Practical Tools for Necessary Change in the Workplace and Beyond by Kwame Christian	[Read Chapter One] provided complimentary "If we want a more equitable workplace -- and a more equitable world--we have to talk to each other about race. The first step toward lasting social change is productive discussion." - Book Synoposis 
Preparing for Difficult Conversations about Race: ***Checklist***	[View the Checklist] This extensive checklist and step-wise guide is supportive to you in planning and preparing for any difficult conversation but does also provide the **Compassionate Curiosity Framework** to: • *Acknowledge and validate emotions* • *Get curious with compassion + example open-ended questions to ask* • *Joint problem solving* ($) LinkedIn Learning: [Difficult Conversations: Talking about Race at Work]

Active Allyship

An ally is a person who is not a member of a marginalized or disadvantaged group but who expresses or gives support to that group; a person who uses their privilege to advocate on behalf of members of an oppressed population through a wide variety of behaviors in all aspects of their life.

Toolkit	Description
Video: Understanding Allyship Through D&I with Julie Kratz	[View the Video] In less than 2 minutes, Julie Kratz explains allyship in a clear and concise way.
Podcast: **Lead Like an Ally:** A Journey Through Corporate America with Proven Strategies to Facilitate Inclusion by Julie Kratz	[Listen to the Apple Podcast:] Lead Like an Ally: Julie Kratz • Begin to fully understand front and center issues in the topics of diversity, inclusion and allyship - and how you can address them with your teams in a thoughtful and empowering way • "Lead Like an Ally facilitates positive change by including six leadership strategies, such as clean up the culture, stretch talent equally, establish ally networks, manage meeting behavior, promote belonging and measure success." - Book Overview 
What is Allyship? Your Questions Answered from the Center for Creative Leadership	[View the Article] "Fundamentally, when we're working on allyship, we're talking about a verb and not a noun: we're talking about actions and behaviors that make an impact, rather than a label or a title that gives someone moral credibility or social capital." -Center for Creative Leadership [Watch the Recorded Webinar:] Introspection into Action: Becoming an Ally in a Time of Racial Unrest Available on demand Duration: 1 hour, 2 minutes

ADAPT:
SHIFT THE SYSTEM

The tools in this section will help you ADAPT your workplace to be more inclusive and make sustainable tweaks to your existing processes.

25 Building DEIB into How You Work

26 Designing Your Path with Culture in Mind

27 Conversations to Build Connection

28 A Structure for Accountability

Building DEIB into How You Work

Companies in the US spend billions of dollars on DEIB initiatives, only to meet with underwhelming impact and unrealized goals.

As you build DEIB into how you work, consider insights from Joan C. Williams, one of today's preeminent voices on inclusive workplaces.

3 Tips For Operators Implementing DEIB

- Use standard business tools
- Gather data and establish baselines
- Measure progress & keep it up until you reach your goals!



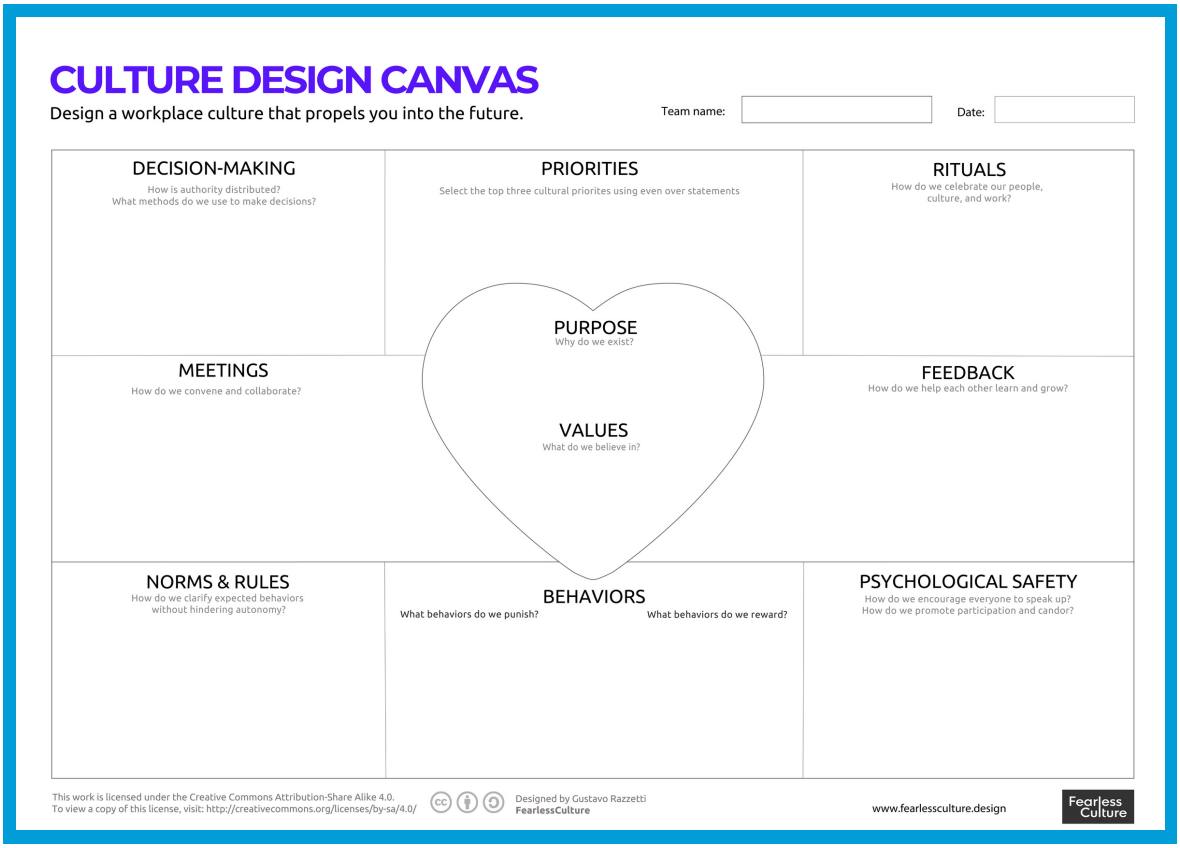
Watch the video

In this video, Williams explains why many DEIB efforts fail and how to get on the path to creating inclusion for good in your organization.

Video: Why Corporate Diversity Programs Fail - - And How Small Tweaks Can Have Big Impact

Designing Your Path with Culture in Mind

Building DEIB into how you work means integrating it into all aspects of your culture. The Culture Design Canvas is a framework created by Gustavo Razzetti for designing the culture of organizations and teams. Using it with a DEIB lens will help you integrate your DEIB intentions and selected tactics for an inclusive workplace into your work.

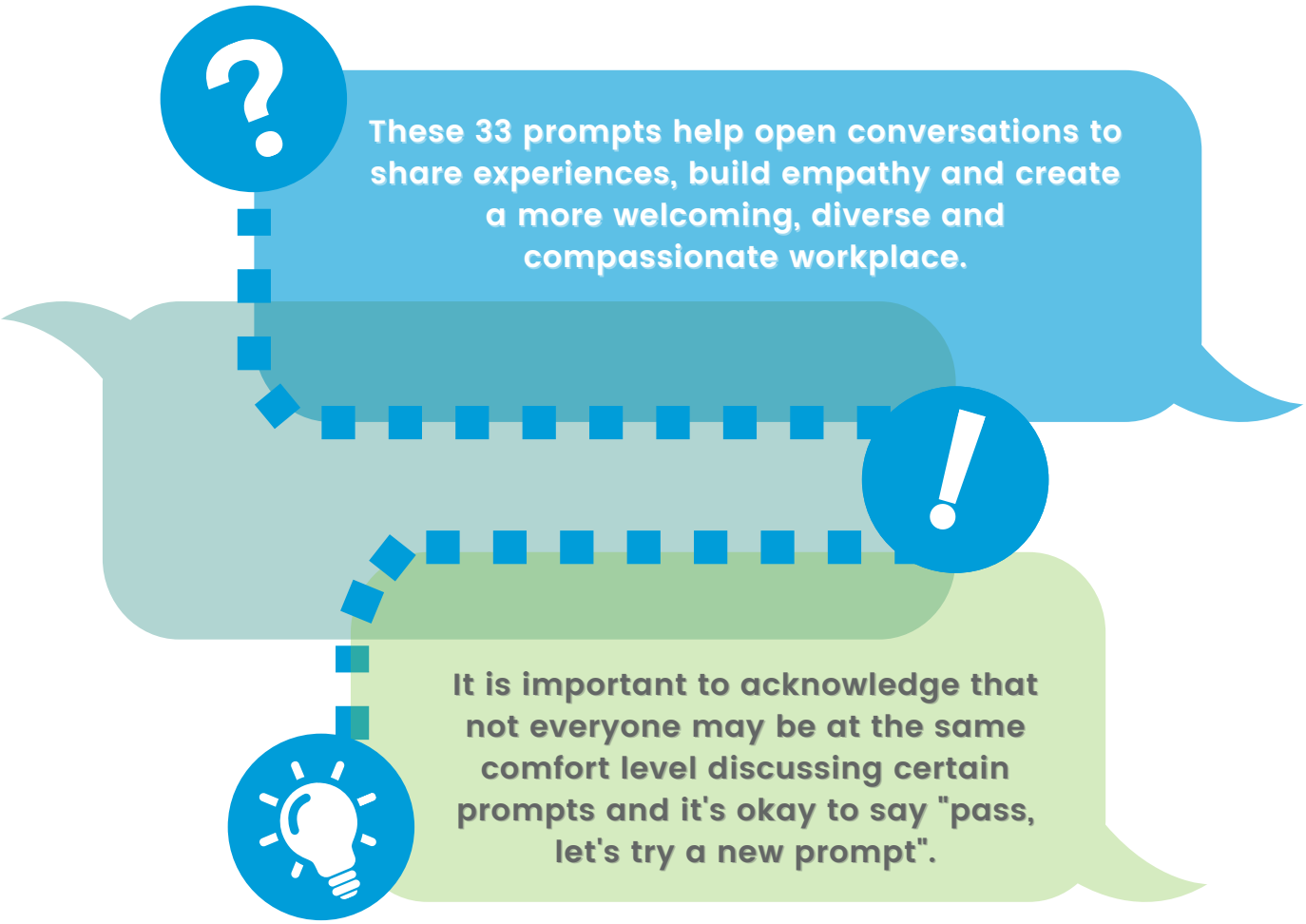


Culture Design Canvas Tool & Instructions for Use

- Download the Culture Design Canvas Tool by Gustavo Razzetti
- Instructions for how to use the Culture Design Canvas Tool
- Creative Commons License

Conversations to Build Connection

Talking about diversity and inclusion is a great way to build DEIB into how you work. Conversations about diversity and bias can be difficult to start at first, so the Trainer's Warehouse has created some conversation starters to enable you to have conversations with both smarts and sensitivity.



UNZiP-it! Diversity Prompts

Access your free set of cards on trainerswarehouse.com

A Structure for Accountability

Shifting culture takes time. Building and maintaining an inclusive workplace takes time. It also takes clarity, accountability and new routines.

Clarity: Role Contribution to DEIB

Role	Contribution
Executive Director/CEO CDO* Board	• Sponsor • Allocate budget & resources to DEIB • Set vision and share it frequently
CDO* CHRO* Other Senior Leaders	• Lend expertise to further success • Engage stakeholders • Create concrete plans
Executive Director CDO* CHRO*	• Drive accountability for results • Set transparent goals, measures and results
Front Line Managers Staff CHRO/HR	• Engage in DIEB initiatives • Develop resource groups • Be an ally • Contribute to DEIB conversation and training

Goals: Manager Goals Drive Accountability

- Work with managers to set goals aligned to your DEIB statement that are related to their work
- Make the goals SMART:
  - Specific
  - Measurable (and motivating)
  - Attainable
  - Relevant
  - Time-bound

Routine: DEIB Progress Checks Built In to Business Rhythms

- Identify and publish clear DEIB measures
- Dedicate time to check-in on DEIB metrics
- Be transparent about your progress and adjustments
- Celebrate success and acknowledge and learn from set-backs

*CDO=Chief Diversity Officer (or equivalent), CHRO=Chief HR Officer (or equivalent)

NEXT LEVEL:
SUSTAIN



Sustaining your efforts takes planning, engagement, measurement, and new habits. Use these tools to support you for the long haul and take it to the NEXT LEVEL.

25 Engagement Planning Tools

26 Outcomes Based Measurement

27 Measurement Metric Examples

28 Commit to Action

Engagement Planning Tools

Organizations with inclusive cultures are made up of confident, inspired individuals who are high-performing, innovative and more likely to achieve business goals. These are a few ways to engage in service of "walking the talk" in your DEIB journey.

COMMIT TO THE PROCESS

- Invest and be intentional with
- your time
- Understand and commit to goals
- Define the next steps you'll take

PYSCHOLOGICAL SAFETY

- Role model and reinforce a culture that accepts and values perspectives
- Welcome the viewpoints and feelings of others

LEARNING EXPERIENCES

- Provide or take advantage of opportunities to gain new skills and be exposed to other perspectives
- Allow time for reflection

RECRUITMENT EFFORTS

- Expand outside of typical sourcing
- Consider the value of recruited individuals with different sources of training and experience

COLLABORATION ACROSS

- Ensure cross-functional representation on major initiatives so many viewpoints are included

INPUT FROM ALL LEVELS

- Invite and gather insights from as many individuals as possible
- Decisions should be informed by the many perspectives of employees

SUPPORTING MANAGERS

- Equip managers with the skills or training they need to establish and nurture workplace environments where employees feel safe to raise their voice

START WITH SELF-AWARENESS

- Assessments may enhance efforts to understand the diversity of teams
- Prioritize getting to know team members on a human level



Resource adapted from the Quantum Workplace free e-book:

Diversity and Inclusion: What it is, Why It Matters, and How to Make it a Priority

Outcomes Based Measurement

Measurement, tracking and transparency are critical structural elements to driving lasting transformation and change.

According to a 2021 study by SHRM in partnership with Harvard Business Review Analytic Services and Trusaic "Closing the DE&I gap requires that reliable data be made available to all stakeholders, especially senior leaders, so tracking is as important as training to make improvements."

> **"You can't change what you don't measure"**
>
> -Peter Drucker

How Metrics Support your Efforts

- Gain insight into your overall DEIB health
- Identify risk areas and prioritize initiatives
- Assign and monitor accountability
- Quantify and qualify impact
- Engage stakeholders
- Strengthen commitment

"Ultimately, you need to rely on a variety of metrics to help you get the full picture. Honest, accessible metrics around your diversity progress are critical to measurable, targeted, and impactful initiatives." -Diversity Metrics eBook: How to Leverage Data to Boost DEI Initiatives Provided by Factorial HR

Measurement Metric Examples

These are a just a sample of some DEIB metrics.

Categories	Metric Examples	The "Why" Behind It
Budget, Headcount	• Number of full time employees in the DEI function (e.g. Chief Diversity Officer) • Total budget for DEI • Budget specified for committees, ERGs or events for DEI	Quantify organizational commitment to investment in DEIB
Representation, Talent Process and Advancement	• Percentage of underrepresented talent out of total workforce, leadership and board groups • Percentage of underrepresented talent promotions • Percentage of underrepresented talent turnover	Assess the current state of diversity to establish a baseline for improvement opportunities in the future
Recruiting and DEIB Training	• Percentage of underrepresented candidates in total pool vs. extended offers • Number of partnerships with underrepresented talent organizations to act as sourcing channels • Percentage of participation in DEIB-specific training	Identify gaps in recruiting and hiring processes
Inclusive Policies and Employee Engagement	• Pay gap audit conducted • Number of inclusive policies (e.g. parental leave) • Coverage of existing policies (both geographic and demographic considerations) • Accessibility (to equipment, resources, cultural holiday recognition) • Job satisfaction and engagement rating	Gauge the organization's commitment to the diverse needs of employees through increased support in an inclusive environment where everyone feels welcome

Commit to Action

Building a culture of inclusion and belonging is continuous work in progress. Establish the critical few key actions you'll take. Remember to make them SMART.

Take into account:

- Your organizational DEIB maturity
- What areas you want to address
- Tactics from the "Consider" section

Specific
Measurable
Action-oriented
Realistic
Time-bound

☐ 01

Action or Commitment:

Brief description and intended impact:

Measure of success:

Time Frame:

☐ 02

Action or Commitment:

Brief description and intended impact:

Measure of success:

Time Frame:

☐ 03

Action or Commitment:

Brief description and intended impact:

Measure of success:

Time Frame:

☐ 04

Action or Commitment:

Brief description and intended impact:

Measure of success:

Time Frame:

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