

INTERNAL DEI ASSESSMENT

2023

GUIDE + OVERVIEW



Examine

YOUR WORKPLACE

DIVERSE, INCLUSIVE, + EQUITABLE

ORGANIZATIONS

Truly transformative work environments create space where employees at all levels of the business can engage in their work and collaborate with others in authentic, transparent, and open communication. Businesses that prioritize diversity, equity, and inclusion demonstrate increased innovation, adaptability, and employee engagement and satisfaction.

Many businesses today recognize the need to allocate time, energy, and resources to diversity, equity, and inclusion (DEI) efforts, but may still face high barriers and resistance to such initiatives when it comes time to take the work beyond one-off workshops.

It can be hard to quantify the need and articulate exactly what needs to change and how to start working on it. This is where the work of assessment can help. By identifying specific areas of challenge, we can better design strategies to address these needs.

WITHOUT ADDRESSING THE WORK ENVIRONMENT CHANGE WON'T HAPPEN

Despite good intentions of organizations, many DEI initiatives fail because they operate in isolation, far from the daily processes, routines, and interactions between employees.

Specialists working in the field of DEI agree that true success requires a long, involved process and should be undertaken with intentionality, vision, and commitment.

The approach Integrative Inquiry Consulting takes is to focus on the interpersonal communication barriers that often inhibit real learning, trust, and growth so that employees can address challenges and concerns openly and equitably.

“I’ve seen a ton of assessments and data come out of our workplace, but [Integrative Inquiry’s] report feels by far the most meaningful.”

- CES East

In order to foster these crucial conversations, organizations must have a deeper understanding of their current situation. That’s where our assessment process can help. Based on the information gleaned from assessments, we can develop targeted interventions and trainings so that employees can better observe and alter their behaviors, policies, and process to impact the organization on a wider scale.

Our assessment process helps establish a common understanding and transparency across your organization.

“We now feel empowered to take clear, tangible actions on challenges we’ve felt but struggled to address directly.”

- Goodwill NNE

CONDUCTING AN INTERNAL DEI ASSESSMENT

To truly impact DEI initiatives, organizations must begin with an assessment process to identify their strengths and gaps inside their company. We use the term assessment rather than audit to reinforce that it is not about compliance requirements, good “scores,” or punitive policies. It is about creating a benchmark process to help the company understand what current needs exist within their organization and set goals for how to improve.

We tailor each assessment to the needs of our client, omitting or expanding on each of the different components to make sure we are building off the work already done and addressing the unique context of each organization we work in.

We describe diversity, equity, and inclusion as three different approaches to trying to achieve justice. Each component of our assessment process targets a particular approach and asks:

- » What are you currently doing in this strategy?
- » What have you achieved thus far?
- » How could you improve?

Organizations we work with choose one or more of these different options, based on their needs, budget, and time constraints. A full assessment (all four of these methodologies) can take up anywhere from 6 months to 1 year depending on client availability.

When we complete our assessment, each organization receives a comprehensive report with key findings, recommendations, and appendixes for each component of the assessment process. They also receive an executive summary and presentation file of the report findings to share with others.



DEMOGRAPHIC ANALYSIS

We help build a process to assess:

- » the diversity represented on your team.
- » how this correlates with promotion and retention rates.
- » how this correlates with other organizations in your region, industry, and sector.



POLICY ANALYSIS

We conduct a review of your policies, practices, regulations, and protocols to assess:

- » what policies are currently in place
- » whether there are any missing
- » whether there are any that create inequities
- » what best practices or case studies can be shared to make improvements.



CULTURE ANALYSIS

We use our custom-built culture map survey to assess:

- » the five components of inclusive & equitable cultures.
- » how safe employees feel in engaging in hard conversations at the workplace.



QUALITATIVE ANALYSIS

No matter what other elements of assessment you select, we usually provide some level of qualitative engagement. This could include:

- » focus groups conducted based on specific identity groups, roles, or departments in order to address safety barriers.
- » community forums around specific topics relevant to the company open to any participants.
- » private interviews with key stakeholders or decision-makers.



Demographics

W H O I S A T T H E T A B L E

Most organizations have some form of demographic information being collected, whether federally required or part of an ongoing DEI effort. However, this data is often limited in utility; the categories tracked are insufficient, the ability to correlate this data to promotion or retention is often impossible, and tracking trends over time can feel overwhelming. This is where we come in.

Diversity is an approach that focuses on understanding, celebrating, and increasing the full range of perspectives and experiences you have on your team. There are many approaches to demographic analysis that vary significantly between industries, state laws, and technological ability. With this in mind, we collaborate with HR departments to develop their own process for better tracking and using demographic data.

Unlike our other assessment tools, we work with each client to build this internally, because demographic data needs to be current and updated to be effective.

We help build a process to assess the diversity on your team, including:

- » Expanded demographic information regarding race, gender, ability, religion, orientation, and language.
- » Trends of demographics across department, location, and hierarchy.
- » Trends of demographics across time to better understand retention and promotion rates.
- » Comparison to regional statistics and factors that impact demographics.

This process takes approximately 2 months.



Policy

EQUITY IN PRACTICE

Protocols, procedures, guidelines, practices; there are so many ways we build institutional policies. Some sectors are more explicitly governed by federal and state regulations, but all organizations have to navigate between what is required and where there are opportunities to improve. By reviewing the structures we have in place in our organizations, we can make targeted changes from the top down.

Equity is fundamentally about whether people have access to opportunities, insight into decision-making, and agency in the workplace. It asks us to reflect on the power dynamics present in the systems we've built. Are our policies and practices transparent and fair or are some people or groups benefiting or being disadvantaged more than others?

The first step to policy assessments is transparency; it is essential to understand what systems exist and why. Then you can look at how to improve them.

We conduct a review of policies, practices, regulations, and protocols in the following key areas:

- » Recruitment + Hiring
- » Compensation + Benefits
- » Advancement + Promotion
- » Equitable Spaces + Accessibility
- » Training + Development
- » Strategic Planning + DEI Infrastructure
- » Feedback + Collaboration
- » Conflict + Discipline

This process takes approximately 3 months.



Culture

A CLIMATE TO THRIVE

Without a culture that is open to change, DEI efforts can falter. Our **Organizational Culture Map** assesses workplace culture by the five categories on the following page. We are looking to understand the extent to which employees feel able to raise and discuss challenges and make the changes needed to foster more inclusive and equitable practices.

Unlike compliance audits, our process focuses on the extent to which inclusion and equity practices exist from a human perspective. The report generated provides leadership with key indicators of strengths and opportunities for creating more inclusive policies and intervention strategies.

Our five characteristics are each intrinsically tied to improving the sense of psychological safety, how employees perceive their ability to take interpersonal risks with one another. This in turn is what creates an organization's ability to hear constructive feedback and make the changes needed to truly further equity and inclusion.

This process takes approximately 3 months.



CHARACTERISTICS OF OPTIMAL WORK CULTURES



BELONGING

The organization values input, perspectives, and contributions from all employees.

Employees report high levels of trust, strong relationships, active involvement, and a sense of community.

Inclusion Safety: belonging, rapport, caring (people care about my wellbeing)



GROWTH

The organization is able to effectively adapt and change and has a fierce commitment to learning/growth.

Employees report opportunities to grow and to give and receive feedback with compassion and candor.

Learner Safety: vulnerability, growth, support (I can ask questions/admit mistakes)

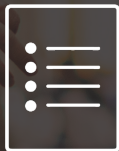


PURPOSE

The organization has clear vision, values, and goals that are widely understood and agreed upon by employees.

Employees report being able to see clear purpose, meaning, and impact of their efforts.

Contributor Safety: sharing & collaborating (my perspective/opinion is valued)



PROCESS

The organization has clear, transparent communication with its team, and aligns procedures and policies with company values.

Employees report strong sense of responsibility, accountability, and role clarity within the organization.

Transparency Safety: candor, openness, truth (I can be honest and expect honesty from others)



AGENCY

The organization supports employee independence and creates more opportunities for distributive power.

Employees at all levels report higher levels of agency and advocacy and feel that they can fight for change.

Challenger Safety: calling in, critiquing, questioning (I can raise concerns and disagree with others)

HOW THIS WORKS:

GETTING STARTED

If you are interested in this assessment process please keep in mind the following:

- Our process takes a minimum of six months and up to one year to complete.
- We require active participation and buy-in from executive leadership.
- We expect to be partnering with the internal DEI and/or HR department throughout the assessment process.
- We can provide accessibility support (including language services) for any phase of the assessment for an added fee.

Data we gather is always anonymized and aggregated prior to sharing with clients. No individual reports or raw data will ever be shared to protect anonymity of respondents in the process.

We strongly urge our clients to prepare a roll-out strategy to disseminate the findings alongside an action plan from leadership. We provide strategic planning support to help with this as an additional service if needed.

Feel like your organization is ready for this journey? Reach out today for a free quote.

info@integrativeinquiryllc.com



WHO WE ARE

Integrative Inquiry is a remote-based consulting firm that partners with a diverse team of specialists from across the country to create lasting, impactful change for organizations.

Integrative Inquiry is a firm committed to equity across all dimensions of identity, including race. Our team represents a wide spectrum of perspective and experience, and this certainly informs and strengthens all aspects of our work.

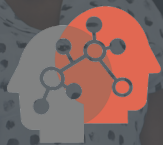
We focus on capacity building and agency, so that organizations can take on these principles and continue to transform and evolve the way they work together long after we part ways.

That said, the mission of our work is to develop organizational cultures where individuals have the interpersonal communication skills to help foster psychological safety. This ensures that difficult conversations can be addressed with transparency, vulnerability, and integrity.

“We must think more holistically if we truly want DEI initiatives to create impactful change. We have to start with how we raise issues, solve problems, and treat one another.”

Kate Stitham, Integrative Inquiry President & Founder

To learn more about our team and business or to get a quote, go to www.intinq.com.



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