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Measuring DEI Impact:

Accountability & Metrics

This Diversity, Equity, Inclusion (DEI) guide is a carefully curated resource developed from lessons learned, best practices, and research conducted by Nika White Consulting. Organizations that leverage this toolkit will be most successful when the guidance and resources are adapted to your organization's unique culture, goals, and opportunities.

The recommendations in this guide reflect the DEI landscape at the time of publication. They are designed to supplement the users' knowledge, skills, and abilities necessary to navigate the complexities of this important work. Whether you are an individual seeking personal growth, a team leader striving to create an inclusive workspace or an organization committed to effecting meaningful change, this toolkit is your go-to companion on the path to beginning your organization's journey.

So, what can you expect to find within this toolkit? Let's take a closer look:

- **Section I:** Tailored DEI Metrics

- **Section II:** Impactful Measurement Systems

- **Section III:** Data Analysis for Insights

- **Section IV:** Cultivating Accountability

- **Resources and further reading:** To deepen and expand your knowledge, we have compiled a list of additional resources to support you in continuing your learning journey beyond the toolkit.

Remember, this is not a one-size-fits-all approach—tailor the materials to suit your unique needs and context. Embrace the opportunity to learn, grow, and make a positive impact. Together, we can build a world where everyone feels valued, respected, and included.

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SECTION I:
*Tailored DEI Metrics: Defining and selecting
metrics to track progress*

Issues related to DEI are often profoundly entrenched within systems and tend to be challenging to solve with one-dimensional solutions through isolated programs or policies. A holistic approach is required to address DEI issues systemically throughout the organization. While HR may spearhead these efforts, the entire organization must be involved. Data and analytics play a pivotal role in this process, aiding in identifying gaps, prioritizing actions, and facilitating continuous progress tracking.

Let's face it –DEI impacts every facet of the business, and an effective DEI metrics strategy leverages data in a way that helps drive business results

Foundational Approach to DEI Analytics

Metrics related to DEI offer insight into whether or not organizational decisions, broadly speaking, align with its values and priorities around DEI and if organizational performance is trending in a positive direction. They not only gauge compliance with regulations but also evaluate the progress of initiatives. An analytics-driven approach can help highlight successes and improvement areas throughout the organization.
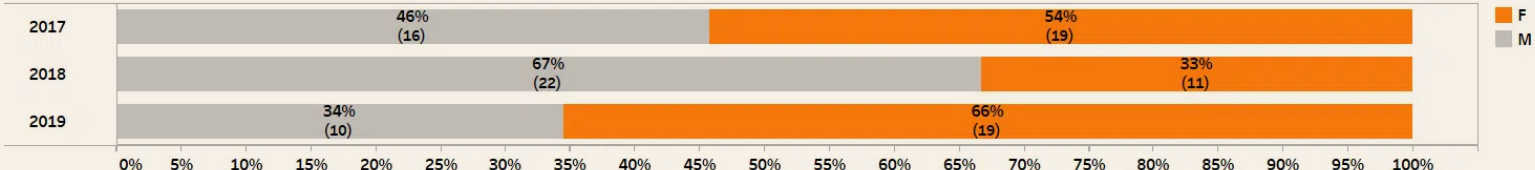
Primarily focused on reporting aggregate rates and raw counts across broader, more generalized audiences, a foundational approach to DEI metrics involves the independent use of typical HR systems such as HRIS, learning management, talent management, and recruiting platforms. These systems provide a solid starting point, allowing for the assessment of, for example:

- **Recruitment candidates** categorized by self-identified ethnicity
- **Demographics of** organizational units by age and gender
- **Demographics of** organizational units by ethnicity
- **Counts and rates of** promotions categorized by age, gender, or ethnicity
- **Representation of** executives across underrepresented groups

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Promotions Distribution

2017	46% (16)		54% (19)
2018	67% (22)		33% (11)
2019	34% (10)		66% (19)

0% 5% 10% 15% 20% 25% 30% 35% 40% 45% 50% 55% 60% 65% 70% 75% 80% 85% 90% 95% 100%

■ F
■ M

% of Total Promotions   *Promotions Distribution: Male vs. Female. Rates and Counts. Last three years.*

A company can only mature when supported (and pushed) by sound DEI data collection and analytics. To be strategic, it must leverage data. To be effective, these data must be detailed to create transparency, shared with insiders and stakeholders to ensure accountability, and accompanied by action plans to promote change.

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Understanding DEIB Metrics

DEIB* metrics are important tools organizations use to check their assumptions, measure their progress toward their DEIB goals, and meet the expectations of consumers, investors, and employees. However, organizations often find DEIB metrics difficult to use and struggle to understand and identify the appropriate data and metrics. There are metrics under each category—diversity, equity, inclusion, and belonging—that organizations should collect and analyze by employee characteristics.**

DEFINITION OF METRICS

Diversity metrics	Equity metrics	Inclusion metrics	Belonging metrics
Measurements, based on employee data, to understand the inherent and self-evident characteristics of the current and future workforce of an organization.	Measurements, based on employee perception data collected directly from employees, and objective data based on employee actions, to understand differences in remuneration, benefits, opportunities, and access for different groups within an organization.	Measurements, based on employee perception and objective data, to understand the current state of integration, acceptance, and respect experienced by employees in an organization.	Measurements, based on employee perception and objective data, to understand if employees feel valued and supported within an organization.

PURPOSE OF METRICS

• Understand the current state of the workforce across the organization • Understand the state of hiring • Find out who is exiting the workforce	• Detect areas of systemic inequities • Identify differences in capabilities, resources, and needs • Implement systems and process that take inequities and differences into account	• Discover patterns of exclusion based on employee characteristics • Understand if diverse employees feel accepted in the workplace • Find out if they feel integrated into and a part of the wider organization	• Understand the difference in the sense of security experienced by diverse employees • Find out if diverse employees feel connected with the company's values and purpose • Bolster the company's ongoing efforts around inclusion and equity

EXAMPLES OF METRICS

Diversity		Equity		Inclusion		Belonging	
• Candidates hired • New hire turnover • Senior leadership	• Total workforce • Tenure • Overall applicant pool	• Frequency of manager check-ins • Compensation ratio • Succession plan	• Promotion rates • Leadership programs offered • Burnout rate	• Internal mobility • Absenteeism • Engagement score	• Feedback opportunities • Employee resource groups offered • Inclusion index	• Stretch assignments offered • Well-being programs • Levels of centrality in networks	• Belonging index • Recognition opportunities • Adoption / use of pronouns

redthread research

For a complete list of metrics, read our report: https://redthreadresearch.com/deib-metrics/
To learn about how to get started using analytics for DEIB, read our report: https://redthreadresearch.com/deib-analytics-guide/

*Diversity, equity, inclusion, and belonging
**All metrics should be measured by number and demographic distribution.

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Dashboard vs. Scorecard

A scorecard is a report that displays key performance indicators (KPIs) alongside performance targets. Scorecards show progress over time.

A dashboard shows scorecard information with other metrics. It's more of a comprehensive snapshot of a moment in time of all KPIs associated with your DEI strategy.
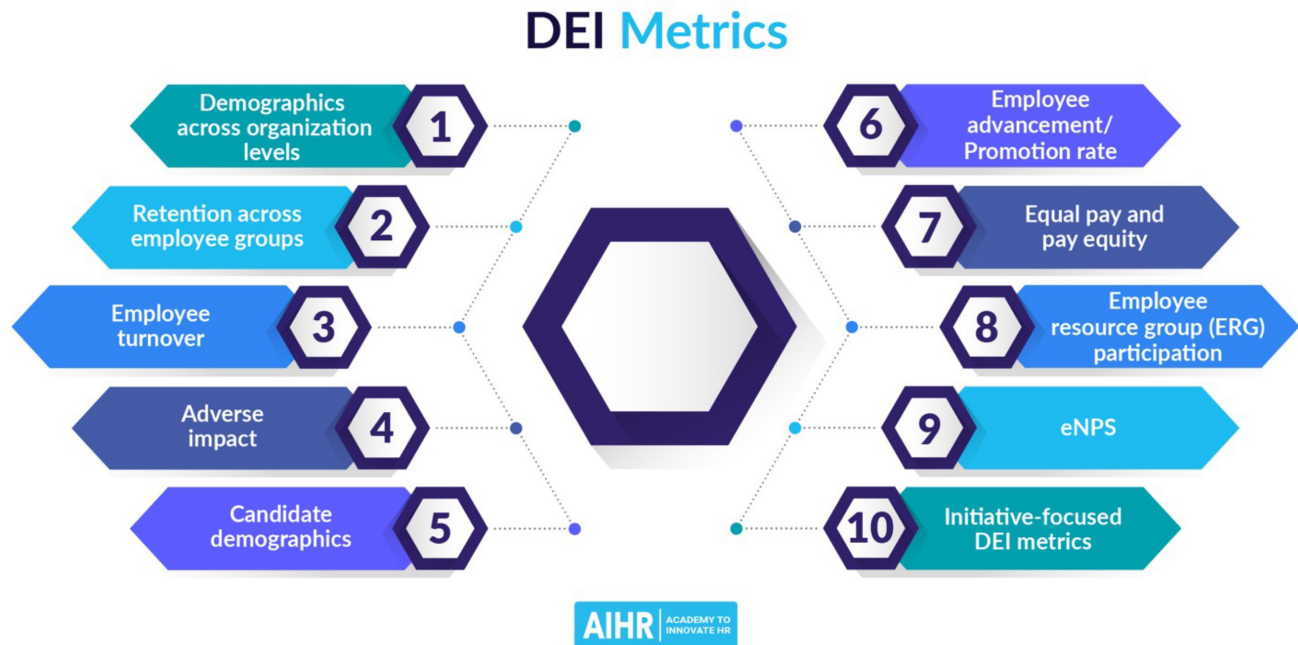
What are the best metrics to use? Depending on the size and make-up of your organization, not all the metrics will be applicable.

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Here are some helpful questions to ask before proceeding:

- **Which metrics will best tell** your organization's most accurate DEI story?
- **Which of the metrics needs to be highlighted** as an urgent priority? Why?
- **Where are critical areas** of concern or high risk?

DEI Metrics

1. Demographics across organization levels
2. Retention across employee groups
3. Employee turnover
4. Adverse impact
5. Candidate demographics
6. Employee advancement/Promotion rate
7. Equal pay and pay equity
8. Employee resource group (ERG) participation
9. eNPS
10. Initiative-focused DEI metrics

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Additional keys to success when tailoring your DEI metrics to your organization:

- **Review the format annually** and edit goals as business goals change.
- **Simplify** your indicators (3-5 indicators).
- **Share the information** downstream.
- **Understand the limitations** of reporting in aggregate. For example, collapsing people of color into one group removes the power of transparency to promote change. Disaggregating race will allow specific issues to emerge that might impact one racial group but not another.
- **Establish a communication cadence** that allows for enough time to pass to make progress but not too much time that will enable people to make uninformed assumptions.
- **Establish mechanisms** to hold leadership and employees accountable for DEI goals and actions.
- **Regularly report on progress,** achievements, and challenges to ensure transparency.
- **Use data-driven insights** to inform decision-making and course corrections.

- **Regularly assess the organization's culture** and gather feedback from employees. Conduct surveys, focus groups, and performance evaluations to identify areas for improvement and gauge the impact of your cultural initiatives. Use this feedback to make necessary adjustments and refine your approach.
- **Use insights that allow the organization** to hold managers accountable for tangible improvements in DEI.
- **Integrate DEI** with other business drivers and give a comprehensive talent picture.
- **Engage stakeholders** (employees, managers, DEI experts) to provide context to quantitative data and ensure analysis reflects diverse perspectives.
- **Enhance awareness of intersectionality** by evaluating the organization's awareness and understanding of intersectionality, considering factors such as the overlapping identities of individuals.

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To make significant progress in DEI, moving beyond basic metrics and simply tracking counts and percentage change over time is essential. This entails examining the entire employee journey through the lens of various data sets and contextualized by employee experience that helps leaders make better decisions through real-time, actionable data. This approach is central to integrating disparate systems into a unified dataset.

DEI data integration involves consolidating data from various platforms, such as HRIS, learning management, talent management, and recruiting, alongside supplementary contextual data like surveys. Pulling together demographic data with performance metrics, learning outcomes, and compensation details and incorporating survey responses, interview data, and program evaluations provides the opportunity for thorough analysis that may uncover biases or inefficiencies within hiring and recruitment processes.

At this level of analysis, fundamental questions that need addressing span the entirety of the employee lifecycle, including:

- **Are we effectively** attracting and hiring diverse talent?

- **Tracking applicant counts** and stage-by-stage conversion rates for underrepresented groups (URGs)

- **Examining the distribution** of new hires across different job levels and categories, segmented by URG

- **Scoring onboarding satisfaction** that measures new employees' sense of belonging during the start of their tenure in a new role.

- **Assessing how well leaders** integrate and promote DEI during performance evaluations.

- **Obtaining exit interview feedback** to understand if URGs faced unique challenges that contributed to their departure.

- **Evaluating the success** of recruitment sources in attracting URG candidates

- **Assessing the URG hire rate** (or developing a customized Hiring Bias Index) by characteristics such as hiring manager gender, ethnicity, sexual orientation/identity, and age.

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Headcount Distribution

Legend: ■ Outstanding ■ Above Average ■ Meets Expectations ■ Does Not Meet

Ethnicity	Period	Does Not Meet	Meets Expectations	Above Average	Outstanding
Black or African American	September 2018	17% (23)	39% (52)	27% (36)	17% (23)
	September 2019	18% (26)	46% (66)	17% (24)	19% (28)
Hispanic or Latino	September 2018	22% (28)	35% (45)	25% (32)	17% (22)
	September 2019	24% (33)	35% (48)	26% (36)	15% (20)
White	September 2018	18% (23)	39% (49)	26% (32)	17% (21)
	September 2019	21% (28)	31% (41)	27% (36)	20% (27)
Black or African American	September 2018	28% (32)	42% (47)	9% (10)	21% (24)
	September 2019	22% (27)	43% (53)	22% (27)	12% (15)
Hispanic or Latino	September 2018	21% (25)	42% (50)	18% (21)	20% (24)
	September 2019	16% (19)	38% (45)	22% (26)	24% (29)
White	September 2018	21% (19)	45% (41)	16% (15)	18% (17)
	September 2019	26% (27)	36% (38)	22% (23)	16% (17)

% of Total Active Headcount

Headcount Distribution. By Gender, then Ethnicity, then by Performance Rating. Rates and Counts. Last 2 Years

Additionally, when engaging in a deeper analysis, it's essential to ask the right questions that will help yield meaningful results.

Are our compensation and promotion processes fair and unbiased?

- **Assess compa-ratio** using URG data, then examine it by department, role, etc.
- **Promotion rates are evaluated** using URG data, considering performance metrics (e.g., nine box, quota attainment) and compa-ratio.

Are we fostering equal development opportunities?

- **Identifying high-potential employees** across URGs by business unit, role, and geography.
- **Providing learning, training, and career growth opportunities** across URGs based on performance, interests, skills, career stage, etc.

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Are we effectively retaining our talent?

- **Analyzing talent turnover** based on URG tenure, learning, manager, department, role, etc.
- **Benchmarking retention rates** against industry standards.

Are we prepared for future success with diverse talent? (Succession Planning)

- **Evaluating the percentage** of ready-now and future-ready workers from URGs in pipelines for critical roles.

Are we cultivating an inclusive culture? Who benefits? How effective are our efforts?

- **Assessing opportunities** for employees in early parenting years, military veterans or reserves, and caregivers for elders or others in need.
- **Determining if URGs feel valued,** heard, and impactful compared to the larger workforce.
- **Evaluating the effectiveness** of programs in promoting engagement and inclusion among work-from-home audiences.

As illustrated below, integrating recruitment, hiring, retention, and turnover data with demographic insights can allow an organization to uncover a gap (notably high turnover among female employees in a specific role) and employ focused strategies across recruitment, hiring, and retention practices to remedy the situation effectively.
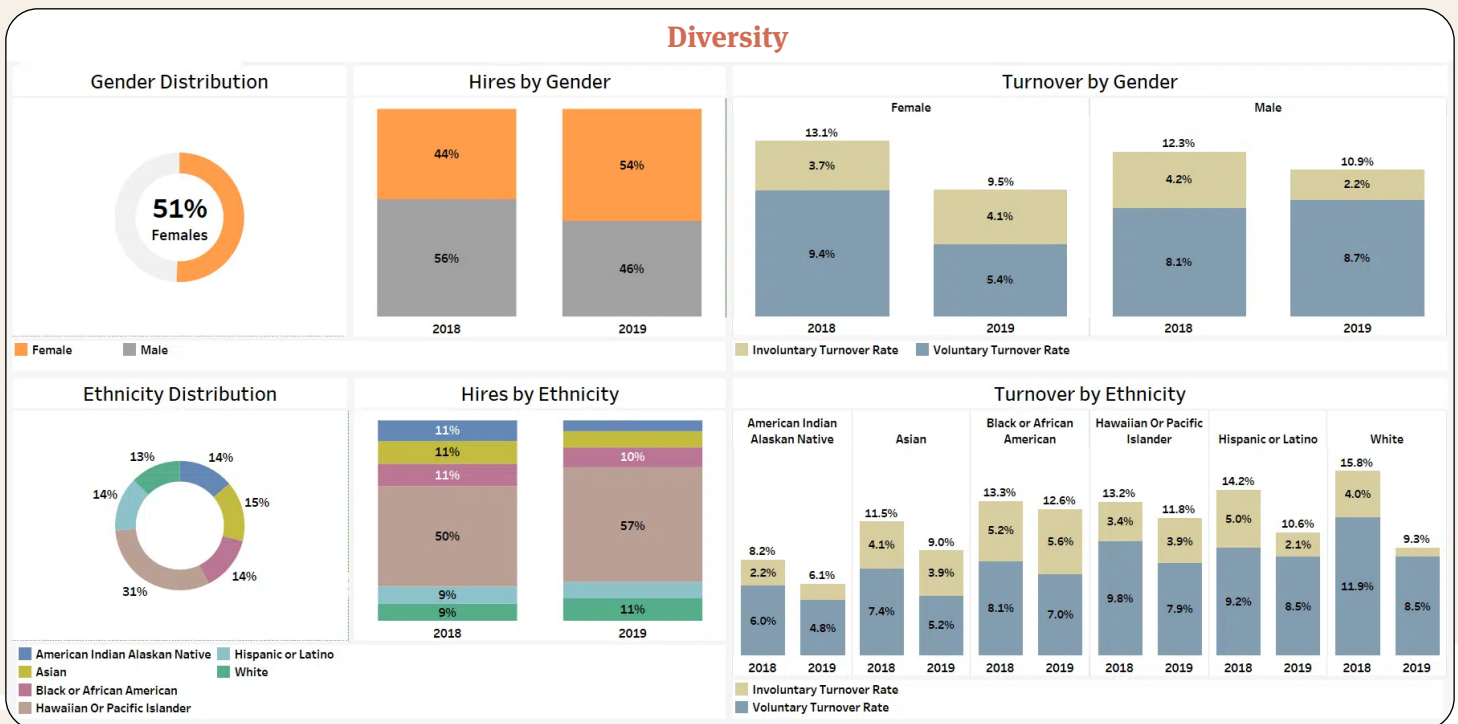
Diversity Dashboard. Headcount, Hires & Turnover by Gender and Ethnicity. Operations Department. Last 2 Years.

SECTION II:
Impactful Measurement Systems:
Setting up systems to gather accurate data and
evaluate the effectiveness of DEI initiatives

It's recommended that organizations leverage a People Analytics approach to their DEI metrics strategy. People Analytics can be defined as utilizing people-related and business outcomes data to inform and enhance decision-making processes. While the specific interpretation of People Analytics may vary depending on the source, its core principles remain consistent. They are applicable across a spectrum of analytics capabilities, ranging from basic Excel-based functions like VLOOKUPS and PivotTables to more sophisticated solutions integrated within enterprise data warehouses.

Key components of People Analytics include:

1 **Aggregation of data from multiple sources** pertaining to HR, talent management, and productivity.

2 **Integrating disparate data sources** into a unified repository optimized for storing and manipulating HR data, prioritizing data exploration and analysis over transactional processing.

3 **Mathematical and statistical algorithms** are applied to compute HR metrics and derive actionable insights.

4 **Presentation and visualization** of data outputs based on user-defined analysis criteria.

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These components must work together seamlessly for a solution to qualify as a comprehensive People Analytics tool. Conventional survey, talent management, or HCM solutions fail to provide a proper People Analytics solution without leveraging a data warehouse for data analysis and reporting.

While some existing reporting mechanisms may offer satisfactory outcomes at a basic level and fulfill the self-service reporting needs of frontline users, they often lack the depth and sophistication required by functional analysts, team leads, and power reporting teams. True People Analytics encompasses aggregating and analyzing data from all HR systems and sources, offering insights beyond mere transactional reporting.

Transactional reporting provides simplistic reporting and metrics, usually derived solely from the data contained within the system. On the other hand, People Analytics offers multifaceted data exploration stemming from a consolidated source of HR, talent, and personnel data. With People Analytics, you gain robust segmentation capabilities tailored to immediate requirements, facilitating trend analysis, data aggregation, detailed examination of individual records and criteria-based lists, and the creation of visually engaging presentations.

SECTION II:
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HRIS systems store transactions much differently than what is needed for reporting.

Transactional systems are designed to efficiently store and retrieve individual transactions rather than aggregate data for reporting purposes. For instance, when numerous transactions are added to an HRIS, such as hiring summer employees, the result is the addition of multiple rows to the database, a task the HRIS can handle.

In contrast, a data warehouse within a People Analytics solution stores data differently. Rather than focusing on individual transactions, it organizes data around employees, positions, or requisitions. This means that instead of storing data related to specific system transactions like hiring, promotions, or pay raises, the emphasis is on capturing information pertinent to employees and their roles.

Transforming a single-dimensional transaction into a comprehensive, people-centric record that captures essential characteristics about an employee and their position is intricate and requires sophisticated logic.

To create this people-based record, gathering and integrating diverse data from multiple sources, all within a specific moment is essential.
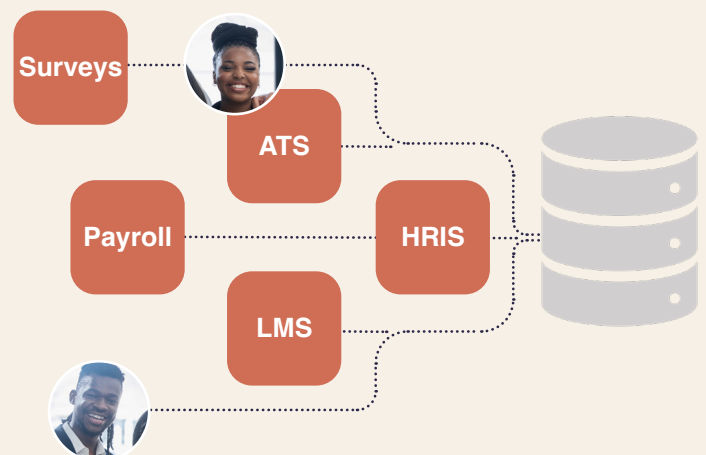
Data warehouses operate differently from transactional systems. When gathering data, the technical process shouldn't be seen as merely "adding transactions" but as "enhancing contextual information" regarding employees, positions, or requisitions.

Time represents one of these contextual dimensions, introducing numerous challenges in designing, building, and optimizing the performance of an HR data warehouse. Therefore, when incorporating additional data sources for HR reporting and people analytics, the aim is to transform them to align with the existing people-centric viewpoint.

For instance, performance data should be considered, as it is often sourced from external systems or spreadsheets. In this scenario, the objective isn't simply to import records, like in the case of transactional systems. Instead, it involves evaluating the validity period of each rating and integrating that characteristic into an existing employee's profile within the relevant time frame.

This process requires substantial behind-the-scenes effort to ensure that historical analyses, such as examining the impact of accelerated pay increases on performance and productivity, can be performed seamlessly and rapidly.

Data integration from multiple sources into a data warehouse

Surveys

ATS

Payroll

HRIS

LMS

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SECTION III:
Data Analysis for Insights:
Strategies to analyze data to inform future DEI efforts, identifying areas for improvement

Data visualization and customization strategies are essential for effectively analyzing data to inform DEI efforts. By transforming raw data into actionable insights tailored to specific audiences, organizations can identify areas for improvement, track progress, engage stakeholders, and drive meaningful change toward a more diverse, equitable, and inclusive workplace.

Visualization and Customization

To visually show data from multiple sources such as surveys, payroll systems, applicant tracking systems, learning management systems, and HRIS into one data warehouse, you would typically use a business intelligence (BI) or data visualization tool. These tools allow you to connect to various data sources, combine data from different systems, and create visualizations that provide insights into your data.

Here's a general approach you can take:

1 **Data Integration:** The first step is integrating data from all disparate sources into a central data warehouse. Depending on your requirements, this can be done using Extract, Transform, Load (ETL) processes or real-time data integration methods.

2 **Data Modeling:** Design a unified data model that can accommodate data from all the different systems. This may involve mapping data fields from each source to a standard schema in the data warehouse.

3 **Data Warehouse Setup:** Set up a data warehouse to store all the integrated data. Popular data warehousing solutions include Amazon Redshift, Google BigQuery, Microsoft Azure SQL Data Warehouse, and Snowflake.

4 **BI Tool Selection:** Choose a BI or data visualization tool that supports connecting to your data warehouse and offers capabilities for creating interactive dashboards and reports. Examples include Tableau, Power BI, Looker, and QlikView.

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5 **Data Visualization:** Once you connect your BI tool to the data warehouse, you can create visualizations. Here are some examples of visualizations you can create for each data source:

- **Surveys:** Visualize survey responses using bar charts, pie charts, or heatmaps to identify trends, sentiment analysis, or demographic breakdowns.
- **Payroll System:** Create dashboards to monitor payroll expenses, employee compensation trends, or overtime hours using line charts, area charts, or stacked bar charts.
- **Applicant Tracking System:** Track recruitment metrics such as time-to-hire, applicant sources, and candidate demographics using funnel charts, scatter plots, or histograms.
- **Learning Management System:** Monitor employee training completion rates, course enrollments, and performance using line charts, stacked area charts, or tree maps.
- **HRIS:** Analyze employee demographics, turnover rates, and performance evaluations using demographic breakdowns, line charts, or box plots.

6 **Dashboard Creation:** Combine individual visualizations into interactive dashboards that comprehensively view your HR data. Dashboards can include filters, drill-down capabilities, and annotations to provide deeper insights.

7 **Automation and Scheduled Reporting:** Set up automated data refreshes and schedule reports to ensure that your visualizations are always up-to-date with the latest data from all your integrated systems.

Following these steps, you can effectively visualize data from surveys, payroll systems, applicant tracking systems, learning management systems, and HRIS into one cohesive view within your data warehouse, providing valuable insights for decision-making and strategic planning.

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SECTION IV:
*Cultivating Accountability: Techniques to foster
a culture of accountability among leadership and
teams, ensuring sustained progress*

It's essential that all employees feel (and are held) accountable for the organization's DEI performance within the context of each employee's roles and responsibilities. Setting clear objectives for leadership is essential to ensure a dedicated and responsible approach to fostering diversity and inclusion throughout the organization. Here are examples of what an organization can hold leaders accountable for impacting DEI:

Promoting Diverse Leadership Representation:

A fundamental aim of DEI in leadership is actively striving for diverse representation. Organizations should establish measurable targets for underrepresented groups in leadership positions, fostering an environment where diverse viewpoints contribute to strategic decision-making.

Implementing Inclusive Leadership Development Programs:

DEI objectives should encompass the implementation of inclusive leadership development programs. These programs equip leaders with the skills to advocate for inclusivity, identify unconscious biases, and cultivate environments that empower all employees to succeed.

Incorporating DEI Goals into Performance Evaluations:

Organizations should set objectives for integrating DEI goals into leadership performance evaluations to ensure accountability. Leaders should be assessed based on their commitment to fostering diversity and inclusion in the workplace, emphasizing the significance of these principles in organizational achievements.

Providing Mentorship and Sponsorship for Underrepresented Leaders:

A key DEI objective is establishing mentorship and sponsorship programs tailored to support underrepresented leaders. This ensures that aspiring leaders from diverse backgrounds receive guidance, visibility, and opportunities for professional growth.

Aligning DEI Principles with Decision-Making:

DEI objectives for leadership should concentrate on aligning DEI principles with decision-making processes. This entails integrating diversity considerations into strategic planning, hiring practices, and policy development, fostering a culture where DEI is ingrained into organizational norms and practices.

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Ongoing communication about DEI must be systematic and flexible to ensure sustained engagement and progress. Here are some best practices to consider:

- **Set clear goals and expectations** related to DEI at various levels of the organization. Individual contributors, front-line leaders, executives, and senior executives should set clear goals related to DEI annually, understand how to achieve the goals, and be held accountable for performance.

- **Establish regular check-ins with leadership** and engage in frank, honest executives about progress against the goals.

- **Engage employees in setting individual and team goals** within an established framework by the organization.

- **Incorporate DEI goals** into the performance management program.

- **Celebrate wins,** big and small.

- **Provide educational resources** on how the DEI goals framework was established and how the goals contribute to the organization's overall success.

- **Share as much of the metrics strategy** as possible with leadership, especially during regular business updates (i.e., quarterly CEO updates, etc.).

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RESOURCES

- [To Make Lasting Progress on DEI, Measure Outcomes, Lily Zheng, Harvard Business Review](#)
- [To Build a DEI Program That Works, You Need Metrics, Joan C. Williams, Rachel M. Korn, and Asma Ghani, Harvard Business Review](#)
- [Seven Sets Of Metrics That Will Help You Define And Achieve DEI Goals, Paolo Gaudiano, Forbes](#)
- [Diversity, Equity, and Inclusion Analytics, HR Analytics, HireRoad](#)
- [How to Hold Leaders Accountable for their DEI Commitments, Latesha Byrd, LinkedIn](#)
- [11+ DEI metrics and KPIs you should be tracking in 2024 to improve inclusivity at work, Kailash Ganesh, Culture Monkey](#)
- [Purpose vs. everything else, RedThread Research, 2022](#)
- [9 metrics to help you understand (and prioritize) DEI, CultureAmp](#)
- [12 Key DEI Metrics to Track For an Inclusive Workplace, People Managing People](#)