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April 2021

RETHINKING THE DESIGN OF EQUALITY, DIVERSITY, INCLUSION AND BELONGING FRAMEWORKS & MEASUREMENTS

This month I had a few conversations with investors and professionals about how to measure Diversity and Inclusion in their team as well as their portfolio of investees or associates in a way that helps advance their EDI objectives.

Far from being a chore, this task is a unique opportunity to have frank leadership conversations, push for participatory practices, and importantly integrate an element of the compliance requirements into mainstream business operations for everyone's benefit.

You can use this guided reflection template to start structured conversations with your teams and design your EDIB measurement framework.

EDI stands for Equality, Diversity and Inclusion. I like to add a B for belonging. We'll see below why it can help change your focus.

Your work will consist in **reducing stress**, and remove -or prevent- actions and processes that stand in the way of an organisation culture that says to people "They Matter".

The strategies you will develop must go beyond legal compliance by contributing to employees and teams' well-being and engagement.

1. FIRST, MAP!

- What your organisation's main goal (guiding star)
- What are your expected business outcomes?
- Map your significant "teams" in your organisation' eco-system and what they need to achieve

When I talk about teams, I think about:

- Core staff
- Associates, contractors
- Suppliers
- Board members
- Your portfolio (if grantees or investees)
- Other stakeholders who you never thought of before as directly influenced by your EDIB approach.

2. BENCHMARK

Start with what you do, what you have, whatever its quality...

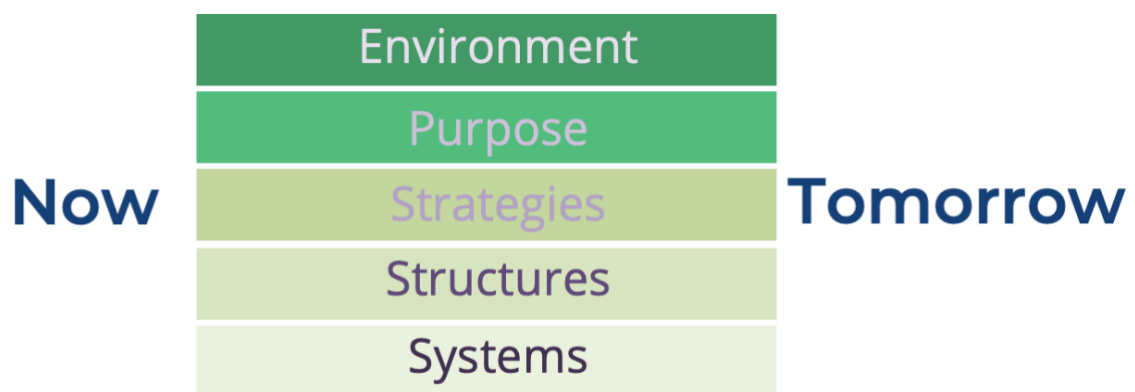
- What are your current EDI objective and practices, if any?
- What are you measuring now if anything?

3. DISCOVER

I encourage you to run a discovery to take a snapshot of your community, and how it has evolved and matured in the past few months according to your stakeholders.

The outcome: a snapshot that will point you to the obstacles and the most meaningful changes you can help your community achieve.

This discovery could take place through a combination of individual conversations, anonymous surveys and group design activities (see further down for specifics) and seek to understand your ecosystem



Environment: for each stakeholder teams, listen to what people have to say about the outside conditions and specific contexts in which they live and operate. I.e. dispersed teams, rural, urban, country specifics, access to infrastructures, support, material difficulties.

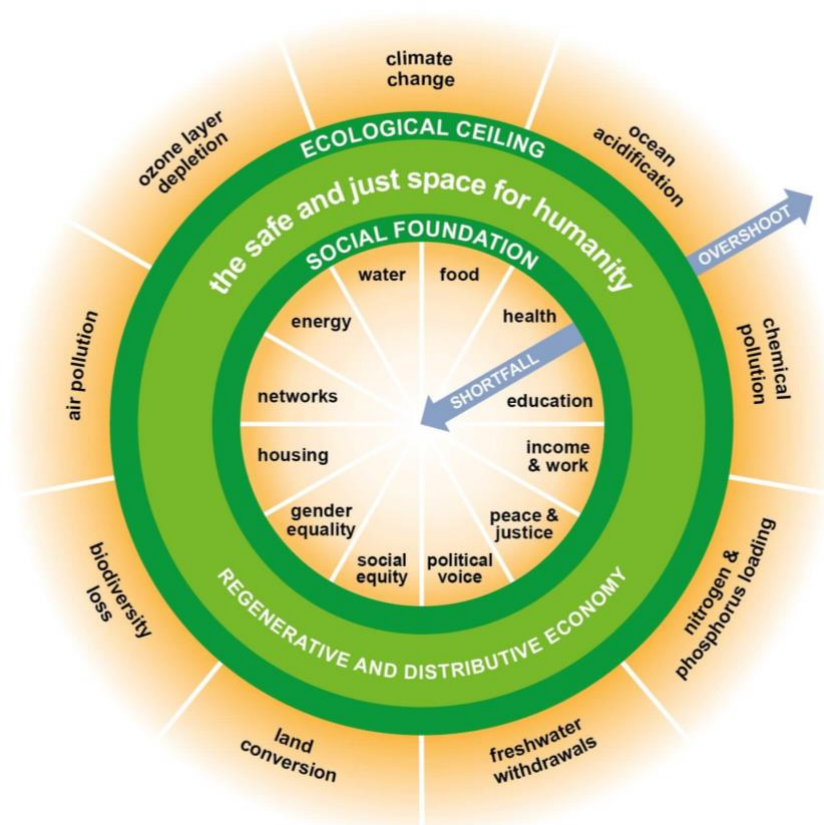
Purpose: You evaluate people's understanding of your purpose/vision/values statements, we will know if these are competitive for a diverse talent, if they are genuinely illustrated in operations, language, processes and content. Explore what people believe is the reason why they chose to be together in your community in response to the environment. Evaluate people's response and notice the patterns. Are teams aligned with the organisation's purpose, or not? What new operations, language, processes need to emerge, to do justice to your purpose, through an EDIB lens.

Strategies: we will look at the bets and trade-offs your decision-making team is making/ or should make to fulfil that collective purpose.

Structures: Look at the division and organisation of work and of interventions and resources needed to execute these strategies. Look at how members are participating, collaborating (based on both past and emerging practices) and see how much your teams are distributed and aligned with the strategies.

In other words, to serve your objectives, some structures might need to go, others need to be transformed, and some might still be useful.

Systems: Look in a granular way at what the team members need to align human behaviour across the activities. How much are the systems Equitable, Diverse, Inclusive and instil a sense of belonging?



Systems can be anything from information-sharing tools, to decision-making processes within and across teams, long or short payment turnarounds to suppliers, interest rates, repayment terms, etc, etc. up to your rituals. **Systems often have the greatest impact on how a community lives, feels, behaves.**

With this discovery, we will be able to paint a picture of what your team members see, feel, think, believe, and do, now.

You will be able to assess the changes that are needed, prioritise actions, and compare your results afterwards when you do a second snapshot.

Remember to:

- Engage with your teams through anonymous or identified surveys, individual conversations, self-directed group conversations among staff, without management, others with management, discussion tables with a mix of stakeholders.
- Ask members about what they believe equality, diversity, inclusion should look like, and their perception of **belonging**. To achieve an inclusive culture, people must feel valued, listened to and respected, but essentially, they also need to feel they belong.
- Prompt conversations with central items from **Doughnut Economics**.

For example:

- Do internal staff access decision-making positions in your senior leadership team or are these positions always filled with external candidates from a specific group.
- Are you looking at the living / environmental conditions in which grantees or investees live which make the contract they have with you easier or more complicated to fulfil?

- Ask what people wish to see ideally that would make a significant difference in their life and contribute to the business objectives at the same time.
- What is missing?

4. MEASURE

- Identify action points and create a proposal that includes what good looks like
- You will include measures that refer to a change from A to B, as per your teams' suggestions. This will help you prove how far your organisation has come in time,
- Identify how these changes impact wider groups. In a system, a change in one team will likely have an impact on another team.
- Identify how changes impact business results and processes (positive and negative outcomes).
- Measurement metrics must be developed to track progress toward goals and senior leaders must be held responsible for progress.

5. TEST & VALIDATE

- Have the teams, including leadership, review these proposed prototype actions
- Include clear references on how actions can be monitored and demonstrated over time (pictures, films, testimonials, safe anonymous feedbacks, physical changes in systems, accessibility, etc.)
- Learn from the feedback. Do people feel they belong more or less after the changes? What else is missing?
- Adjust and amend where necessary, keep actions relevant.
- Ask a diverse sample of "team" members to review the progress at regular intervals. These are not necessarily EDI officers, but people representing different sections of your organisation and portfolio.
The person/team in charge of EDIB will capture comments, insights and suggestions moving forward.

EDIB is not a separate function, it should be integrated into all operations.

6. RESOURCES

From the Institute of Development Studies – with possible questions for your EDIB interviews and measurement suggestions.

[https://assets.publishing.service.gov.uk/media/5bace6fb40f0b62dd732c49f/123 -
_Defining_and_measuring_inclusion_within_an_organisati.pdf](https://assets.publishing.service.gov.uk/media/5bace6fb40f0b62dd732c49f/123_-_Defining_and_measuring_inclusion_within_an_organisati.pdf)

Doughnut Economics Paper

https://www-cdn.oxfam.org/s3fs-public/file_attachments/dp-a-safe-and-just-space-for-humanity-130212-en_5.pdf

ESGx Community

A series of place-based-investing webinars that put "local places/communities" where SDGs indicators come together at the centre of the doughnuts

www.esgx.org

Podcast with Yancey Strickler (Founder of Kickstarter) and Kate Raworth

check min 28'

<https://ideaspace.simplecast.com/episodes/doughnut-economics-author-kate-raworth-on-the-century-of-natures-metrics-ouvS5MeJ>

Working from a human-centred design is not the whole answer. What else are we missing when we do this?

<https://cassierobinson.medium.com/beyond-human-centred-design-to-501a994f3123>

If you're looking for ideas for transformative action, this reading by “**The Rethinkery**” will offer you many.

As you design your EDI and Belonging framework, in the context of your organisation’s goals, the **FUTURE IMPACT CLUSTERS** highlighted in the document alongside actional advice will help you anticipate focus points.

https://www.rethinkery.com/assets/Rethinkery_PostCovid_GuideFINAL.pdf