



This presentation is for delivery at the September 11, 2021 PFA conference in Irving, Tx. The purpose is to serve as the “playbook” for PFA members who will be implementing a Diversity, Equity and Inclusion program, or are already doing so now. A diversity audit is a key feature in properly identifying risk and opportunity areas, key areas of focus, program goals and progress over time. The PFA audience is broad in experience, this approach is designed in an attempt to support organizations in various stages. Please see the PFA DEI page for additional resources for DEI programming. Or reach out to Sunny Nastase, 678-699-3870

As Lane mentioned, I have been doing DEI work for decades now. I want to assure you that a common theme in successful programs is the discipline of 1) conducting an audit, 2) analyzing findings and letting the audit “lead” the program, and 3) measuring impact over time.

I will do a pretty short presentation, then we will do two breakout sessions that will have you some hands on experience with the audit, and stimulate ideas and suggestions for each of you.

Diversity Equity and Inclusion

Common Categories

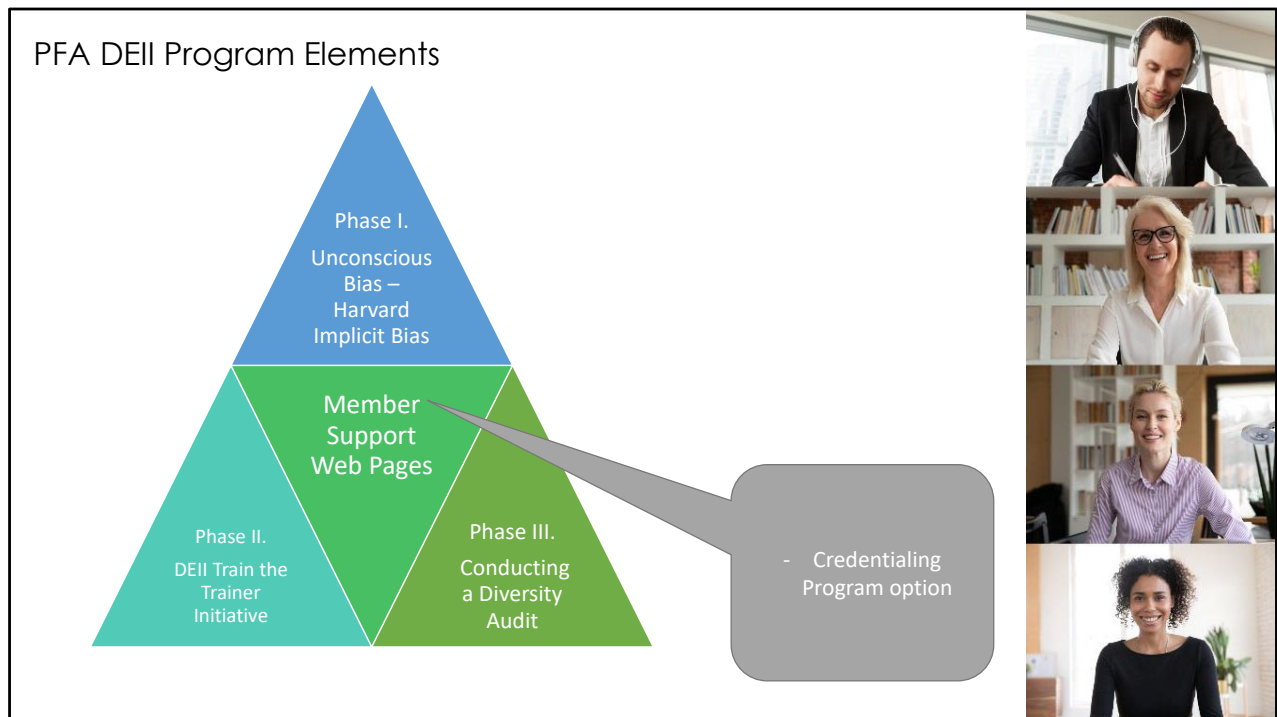
- Ability/Disability
- Age
- Race/Ethnicity
- Body Size/Type
- Cognitive Diversity/ "Diversity of Thought"*
- Family Status
- Gender/Gender Identity
- Religion/Spiritual Beliefs
- Sexual Orientation
- Socio-economic Status
- Veteran



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- Let's talk about Cognitive Diversity. It's easy to say, but it's "code" for playing it safe, and being close to status quo. Whether intentional or not, the message conveyed is that ...

Diversity of Thought (55%), Race/Ethnicity (44%) and Gender (33%)



For review, the PFA DEI initiative has three elements and a support core. First is the Harvard Implicit Bias work, which has begun. I can review some of the data we are finding during the Q&A section, if you'd like. PFA has made a considerable investment in the bias assessments because it understands the critical nature of having a personal bias discussion – making it about the individual and not “someone out there”. Your organization can have it's own data to use for programming! Please use this investment before it expires. The second element is the “Train the Trainer” workshops and PPT. These workshops were held on line last year, an the content focused on how to set up and operate a solid DEI program. This part – the DEI audit – is the focus of today's work.

PFA houses a section on the website that contains many support articles, tools and templates, as well as research and ideas to implement all three of these phases. Please use it as a resource. All of these tools are at no cost to member organizations! In addition, PFA has contracted with my organization to develop a series of workshops for staff, board, volunteers or students, that can be delivered in person or virtually. These are the only aspects of the program that are billable to your organization. I think of the Harvard work as the “head” – how we react mentally and emotionally to others. I think about the Train the Trainer (programs) as the arms, legs and spine – how we move forward on DEI. But I think of Audits as the soul. It has places no one sees, bright spots and dark spots. But it's palpable – people can feel it. So it's important to make sure this soul is addressed and

understood.

Diversity Equity and Inclusion

Diversity is the practice, intentional or organic, of inviting or allowing persons to be part of a group, who possess characteristics other than the dominant group members.

Equity is the guarantee and the reality of complete "on par" treatment, access, advancement, pay equity and benefits that the group enjoys.

Inclusion is when non-majority persons experience the same level overt and covert respect, contribution, and experiences as the group. Inclusion is in place when no difference (based on non-dominant characteristics) exist in influence, responsibility, power, activities the sharing of opinions and setting of norms and values of the group.



*"Diversity is being invited to the party.
Inclusion is being asked to dance. Equity is
being on the planning committee."*

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There are dozens and dozens of definitions, many of which blend these three within the definitions of the others. There is also the subject, not always spoken out loud, about "representation". Corporations have been doing this for years – trying to have people who are much "like" their customers as possible – those within the corporation are a representative set of those who buy their products – or who could buy their products. Diversity and inclusion is about bringing out the best in any organization and refusing to exclude or sideline anyone who is not in the majority. It's also, in recent years, proven to make a significant impact in organizational performance. Let's take a look.

DEI-relevant experiences better prepare students to be “connected”, successful leaders in an increasingly diverse and inclusive world

By 2025 millennials will make up 75% of the US workforce. They are nearly 20% more diverse and there are 11M more of them (Quantum Workplace, 2020).

In 1980 minorities made up 18% of the workforce. Now it is 37%.

- A 2019 analysis finds that companies in the top quartile for diversity were 25% more likely to have above avg profitability – up 21% from 2017 (McKinsey, 2019)
- “Inclusive” companies are 120% more likely to hit financial goals and realize 1.4% more revenue (Beta, 2020)
- Not only is financial success driving companies, but so are their employees: “75% of employees think more diversity is needed” (SHRM, 2020)
- Racially and ethnically diverse companies are 35% more likely to outperform competitors and 70% more likely to capture new markets (Beta, 2020)
- 40% of employees leave a company after harassment, bullying or stereotyping – and turnover is expensive – 1.5 to 2 times the annual salary of the lost worker
- In 2020, 60% of companies had metrics in place to measure their success to drive toward greater diversity, and an additional 28% are working toward metrics and policies to increase diversity and inclusion (Forbes, 2021)
- Employers know that 67% of candidates seek diverse companies, and are sensitive to “coded language”

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I want you to read these headlines.

These are real studies by proven institutions like Forbes, McKinsey and others. I have a link here that will take you to these articles. The point I’m making is that it’s not politics, It’s not trendy. It’s not even fell-good. It’s good business. The facts are on the side of investing heavily in diversity and refining organizational policies and support programs that help accomplish this. I have copies here of the data for you to take home and glance over. You may know much of it, you may not. But I find it’s helpful to have a few memorized – to be able to speak to the value of good business and why PFA member organizations, and the students you serve, benefit from being engaged on DEI/



.....
DIVERSITY AUDITING:
WHAT, WHY, AND HOW

Like a puzzle, a diversity audit pulls together pieces that are not necessarily linked – things that don't initially appear to go together. But by sorting through, the picture becomes clearer.

Here's a watch out. Diversity Fatigue is a thing. Research suggests that it's likely to set in when diversity "language" is thrown around, but it doesn't align with the mission or goals, it does not result in notable improvements, it's stressed but shows up as a "program" and not really a part of the fabric of the organizational experience

What is a Diversity Audit?

Can encompass many elements, including but not limited to:

- presence or absence of minorities in the organization
- equity policies and practices
- social media and print communications
- pay and opportunity equity / gap analysis
- orientation and onboarding
- people development and leadership status and practices
- opinion or "experience" surveys
- turnover, complaints or legal challenges

Data **Culture**
Policies **Processes**

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A diversity audit helps you understand your diversity status and culture at a point in time – it captures disparate pieces of information into a whole set. It then becomes the platform upon which to build a more inclusive organization through targeted plans based on evaluation of the findings. This provides a clear holistic view in terms of DEI, forms a baseline upon which to compare over time.

Provides a comprehensive view of data and observations which should converge with desired organization mission and goals to create and sustain a welcoming and productive environment for all.

Any sound diversity auditing exercise should represent the 4 quadrants here, leaving none out, but some may be weighted more heavily, depending on your life cycle. For instance, really looking at policies and processes is very important, but more mature programs have often solved for these issues and so, weight them less heavily in out-years, focusing more on cultural diversity metrics.

Results in thoughtful, actionable concepts to deliver proven benefits of greater diversity of a workforce, productive teams, and preparation for students to have the skills and diversity aptitude to lead in the future

workforce.

It should be fact-based, unbiased, apolitical and should unflinchingly capture conditions. You can find audit out there that “score” your organization against a standard. I have not found this to be helpful. Instead, your organization is where it is, at a point in time, and what really matters is setting up next steps, moving forward, and making progress or maintaining excellence.

Why Conduct Diversity Audit?



The PFA mission – and yours - includes preparing students for future success. “Diversity aptitude”

Member organizations must remain relevant, socially connected to student values.

For students and member organizations, drawing talent from a larger pool means more opportunity to capture excellence.

The current employment and student climate demands we continue to self-assess and improve.

Heterogeneous groups have been proven to innovate more, understand the needs of other groups better, and drive higher performance.

Successful organizations are in a constant state of self-evaluation, benchmarking and growth.

Universities are typically among the most diverse organizations in the world – but we have to prepare students to enter workplaces that are still in the process of adjusting from “traditional” employees to more diverse employees – they need to lead in those organizations, have a “diversity aptitude” which means more observant, able to navigate, able to create action, to address diversity

Data shows young people are highly sensitive to DEI vernacular and intention – and are

Re-show slide 4, and hyperlink 3 articles on proven value.



What does a Diversity Audit accomplish ?

Provides a comprehensive view of data and observations as aligned to the organization's mission and goals to help create and sustain a welcoming and productive environment for all.

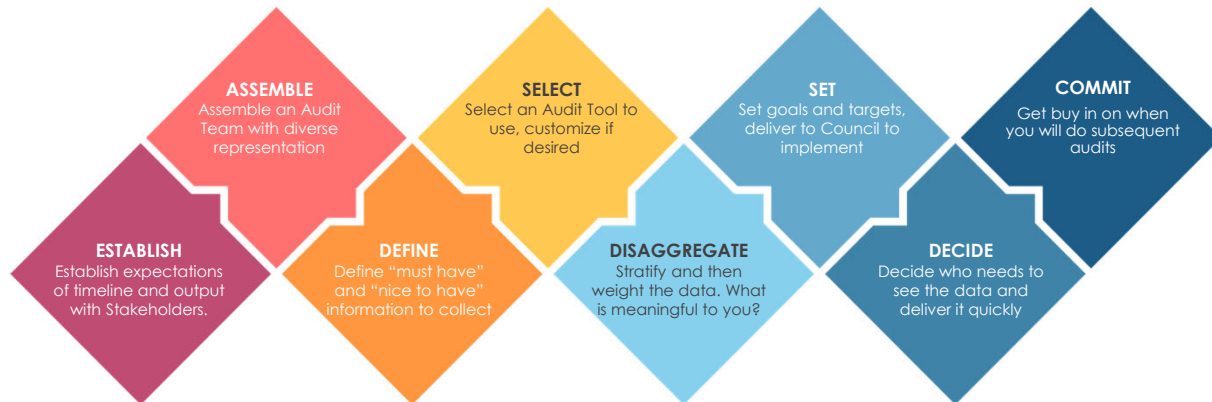
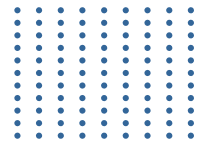
Results in thoughtful, actionable concepts to deliver proven benefits of greater diversity of a workforce, productive teams, and preparation for students to have the skills and **diversity aptitude** to lead in the future workforce.

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The audit itself is useless to PFA. So what's the end game?

It's in these two steps that the effort pays dividends. First, it puts the facts on the table to drive a plan and track results. Second, the programs, policies and activities that result make changes in the diversity awareness and behavior – of students and all others – means that students, and those that work with them, have real tools and insights to improve their own diversity aptitude.

How to Conduct Diversity Audit



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Setting expectations is important – make sure you cover what you expect to evaluate, how long it will take, and what the deliverable back to them will look like. Allow yourself a little wiggle room for unforeseen challenges. You can use an existing committee or not, depending on their capacity, focus, and maturity

Get a techie person to own the data disaggregation part.

In terms of designing what is a “must have”, it’s really important to cover as much as possible the first time, because this will be your baseline for improving. If you find that there are data aspects you plan to look at that make sense for your organization that are NOT in my tool or another you have found, that’s fine, just decide where it fits and make it formally a part of the audit. Example – Veterans as a minority group

A word about “tool” – use one. Just having a pile of data does not help – believe me, I’ve seen this mistake many times. The tool assembles like categories together, allowing you to really see stronger areas or opportunity areas

Going After Content for your Audit

RAW DATA INQUIRIES	SURVEY METHODS	FOCUS GROUPS / ROUNDTABLES
 <ul style="list-style-type: none"> ▪ Race, Gender, Sexual orientation, Religion (e.g., "categories") ▪ Students, Staff, Volunteers, Vendors ▪ Job and level analysis by category ▪ Pay, benefits, tenure, turnover by category ▪ Complaints, legal challenges 	 <ul style="list-style-type: none"> ▪ Questionnaire on feeling engaged, sense of belonging, being equally respected, equitably valued, contributing equally ▪ Pulse Surveys- Quick 3-5 questions over a few weeks or months 	 <ul style="list-style-type: none"> ▪ Strengths and weaknesses in terms of diversity, equity and inclusion each, specifically ▪ Specific topic discussions ▪ Ask Rate and Rank questions, do not solicit examples in public

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Before we speak about these, the point must be made that it's the disaggregation that really tells the story. You must disaggregate by sub group if at all possible. "general" information does not help here. Example, you may have a satisfactory rating of feeling included if you have all races and genders in one bucket, but they may be very different when you look at different categories, example, white men, black women, black women who are mothers.

Note: It's recommended to have a brief statement of why you are asking for the information, and what you intend to do with it. Example:

"XYZ Sorority is collecting information over the next few months to understand our current situation with regard to equity among students, staff, volunteers and vendors, which we hope to improve upon. You may be asked for personal data or opinions because we believe these are important issues. You may absolutely feel free to opt out. To learn more, contact:..."



Unpacking the Findings | A Recommendation

FACT REVIEW

Agree not to comment or judge. Offer suggestions on further disaggregation.



BLIND CONTRIBUTION

Each contributor selects items of data they feel indicate a need to act. Categories emerge – then select a few areas of focus.



FACILITATED MEETING

Align the areas of focus with your Mission, Relevance, Urgency. Consider your audiences.

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Doing a fact review with your committee is about just looking at what is found and having a challenging conversation. Did we collect enough? Can we look deeper? Are there sub groups we need to look at? For example, we have to disaggregate the data. Averages tell us nothing. What are our women thinking vs men? People of color? International students? T start “blinded” suggestions to start? Here is where group think starts to lead the conversation, and people often go to what is more comfortable. Left to consider the d Set rules.

Fact review is about just that. No judgement. Put up a sign!
Committee can be joined by additional members, be inclusive!

Now that you have the insights, you start talking about
Facilitated meeting can be same day or future time. Facilitator can be one of the group, but should be experienced in managing sensitive topics. What has emerged? What aligns to your mission as an organization? What do your customers want you to work on? Like students, staff, board? Start there. It’s ok to put some things off for the future, and pick off low hanging fruit when you are just starting.



We have now talked about the why to do an audit, and what we want out of it. We have discussed the audit tool itself, and I've offered you one, which you can customize. We've focused on the importance of using the data, and disaggregating it. SO IMPORTANT. I shared some ideas on how to interact with the data once you have it – that is, Fact review, Blind Contribution, and Facilitated Meeting. The audit is about the big things – policy, equitable practices, structures. However, it can also spur program ideas, so a collaboration with your Diversity Action Council is paramount. In fact, many programs use Council members on the Audit team. However, this is a heavy lift to do both, so I caution about putting too much on the Diversity Action Council to do the actual audit. I suggest having them in the process, but breaking out the actual data gathering and uncovering/articulating findings to others. Careful of burnout!



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Breakout Session One | Fictitious Organization

CARDS

- BLUE CARD = Group Facilitator. This card can get passed a maximum of 3 times. This person is also a team contributor.
- RED CARD = Spokesperson. This card can get passed a maximum of 3 times. This person is also a team contributor.
- YELLOW CARD = Flip Chart Scribe and is also a team contributor.
- WHITE CARDS fill out the Diversity Audit Sheet and are also team contributors.

RULES

- You have about 15 minutes to answer the below questions AND fill out your Diversity Audit.
- If the question is not answered in your cards, it is a NO response.
- Hold up a card if your group needs assistance.
- Write down any thoughts, ideas, questions that arise.

ACTIVITY SESSION

- Discuss **strengths** – things that we can build upon?
 - ❖ Identify a few ideas for goal, programs or activities.
- What areas are weakest or **undeveloped** entirely?
 - ❖ What ideas came up to start to get some traction on these such as processes, programs, activities, promotion or awareness...
- List 3-5 important **targets/goals**. They can be ideas generated above, but don't have to be.
- What **key resources** will need to be leveraged to be successful in our focus areas?
- BONUS: How would our **students experience us differently** if we implement our ideas successfully?

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Situation: You are the acting as the committee doing the Audit, in a condensed method and timeline.

Rules:

- Working as a group and using your cards, answer the below **questions** AND fill out your Diversity Audit.
- If an item is not answered in your cards, it is a NO response.
- Hold up a colored card if your group needs

assistance.

- Throughout the session, be prepared to write down ideas that arise, thoughts or questions.

Breakout Session Two | Delivering Value Now

RULES

- Use your OWN Pulse Audit from your pre-work
- Work individually in the Create Section, then as a group in the RoundAbout Section.

CREATE SECTION

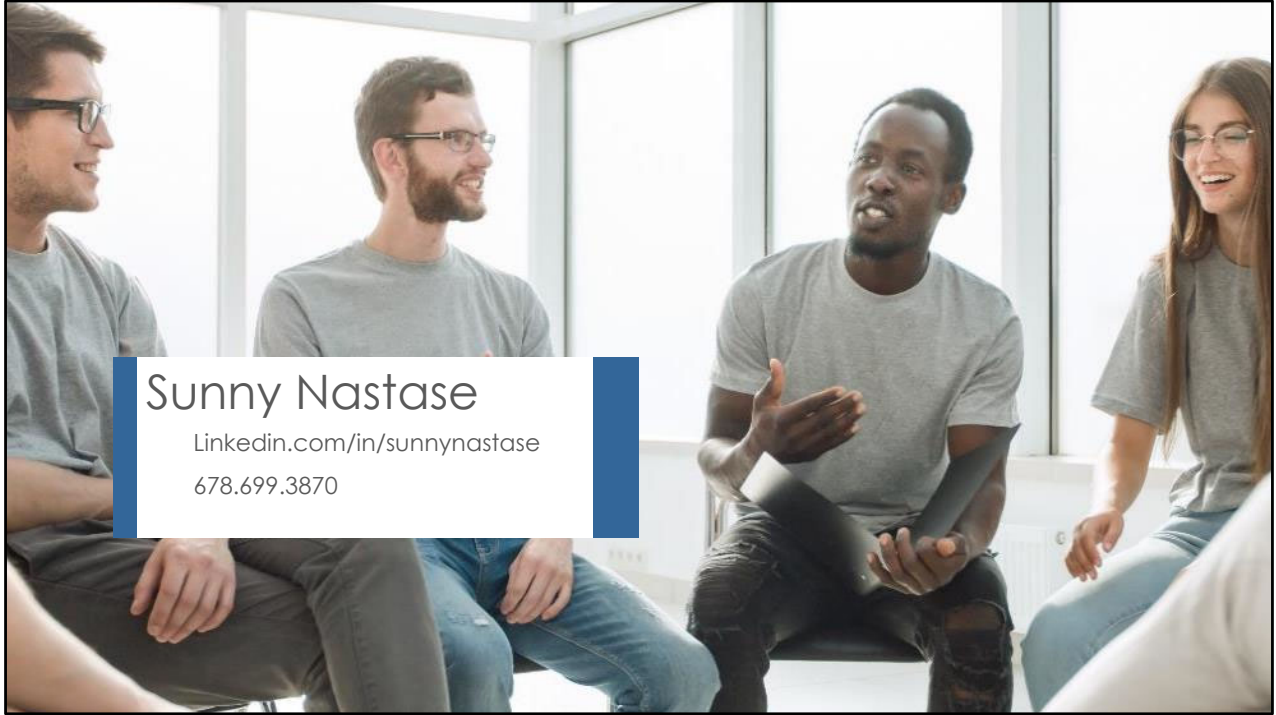
Answer **any 3**:

- What would you add or take away from the audit to customize it to your organization?
- What key DEI metrics will be instrumental to start collecting –why?
- What are our weakest structural areas, and what policy, guidelines or practices might we put in place to improve?
- What strengths point toward places we can put focus? What is an idea that comes to mind to leverage that strength?
- What are the most important positive impacts that an Audit of Audit finding can have on our membership?
- What might we address on our web presence or application process? What needs to be looked at or changed?
- What BOLD IDEA seems prescient that we can present to our students to challenge them to take on or get involved?

ROUNDAABOUT SECTION [TWO MINUTES each, Facilitator times this]

Pick ONE response from the above list to share with the group. Here are some suggestions to assist you in choosing:

- You are soliciting feedback or help or want to get others' experience.
- You are really excited about this and feel it's worth sharing.
- You think this one would be well received by the board, staff, volunteers and/or students.
- You think this is a good place to start your program or to shift the momentum.



Sunny Nastase

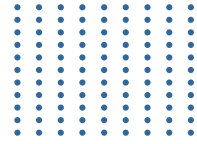
[Linkedin.com/in/sunnynastase](https://www.linkedin.com/in/sunnynastase)

678.699.3870



I want to acknowledge the outstanding contribution to the work by Rileigh Roberson, who has been a remarkable and productive partner for nearly a year now. I'd also like to thank Joan Rogala, who could not be with us, but whose vision and championship made this three phase approach possible. I would like to ask for a round of applause for Joan, whose daughter is representing her today. Finally, Lane, thank you for the support in so many ways, Without you, each organization would be on it's own, Instead, we are together in our journey toward greater diversity, with great momentum behind us.

Highlight Harvard Implicit Bias Findings to date



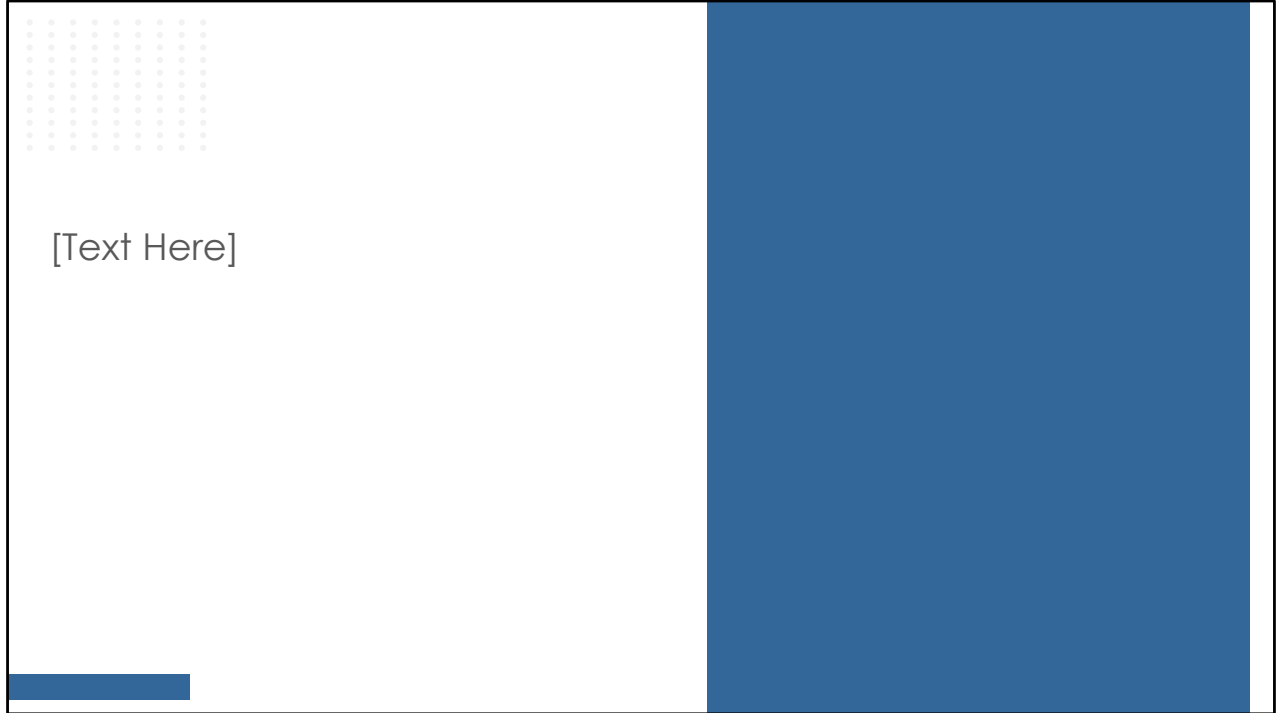
Demographics

- 207 participants in 12 organizations, 21 “sites”
- 42% students, 33% non-students, 25% alumni
- 56% reported “some experience” with unconscious bias assessments
- 51% have < 1 year with PFA, 20% have 1-3 years, and 29% have 4 or more years with PFA (likely non-students)

Bias

- 76% had a **male-career/female-home** bias
 - Of these, 29% acknowledged this preference, 51% were not explicitly aware that they had a preference
 - This was lower in students with 21% having implicit bias vs 79% of non-students
- 81% had a bias for **European faces vs African American** faces
 - 54% showed strong to moderate preference
 - Of these, 18% acknowledged this preference, 61% were not explicitly aware that they had a preference
 - 59% of students acknowledged this bias vs. 74% of non-students
- 88% had a bias toward **younger vs older** people
 - 55% showed a strong to moderate preference
 - Of these, 75% acknowledged this preference, 15% were not explicitly aware they had a preference
 - 60% of students believed they had this bias vs 52% of non-students

There is not enough data in this pool to draw broad conclusions, but they are provocative. What we see here is that bias is quite strong in traditional areas of race, gender/career and age, despite being in a community (college) that sees itself as unbiased relative to the larger population. The findings should surprise students especially. The non-student population does not account for the % of bias. More disaggregation needs to be done



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