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**PFA DEII Customizable Diversity Audit Tool**

September 2021

This tool is designed to capture an organization’s current state regarding diversity, equity and inclusion. It is composite tool – based upon sound practices used in other settings. However, this PFA Diversity Audit is customized to members’ unique environment. It covers four fundamental areas, as stated below.

It is designed to be with PFA’s range of organizational structures, such that it can be used for an individual chapter, a region, or an entire member organization. Additionally, you will note that - unlike some other similar tools - this one does not produce a “score”. Instead, it is based on the approach that the results are indicative of a point in time, and that its value is driven by the insights, programs, goals and progress over time, not from a numeric ranking. Every organization, and subgroups within that organization, will be unique and will evolve over time.

Correctly done, a useful and high-impact diversity audit *triggers other workstreams*. These include:

* **Data** gathering and evaluation activities including capturing statistics, performing **survey** activities
* Setting short-term **targets** and long-term **goals**
* Determining program **focus areas**
* Advising and **collaborating with board members** and organization executives
* Driving **insights** for communicating with various stakeholders, such as students
* Initiate **improvements** in policies, processes, and practices
* Initiate **refinements / contemporary updates** in social media messaging and other published communications

There are two ways to use this Audit.

**Method One: Pulse Diversity Audit (Also used for the 9/11/21 workshop)**

The Pulse Audit approach is a swift, “temperature” of the situation, and need not be precise. The responses may be estimated, based on individual observation or opinion. It is not appropriate to design programming or set goals with this approach – it is, however, useful to get a categorical understanding of areas that need attention and can help set the stage with decision-makers regarding the need to do a Strategic Diversity Audit. The Pulse Audit is not meant to be hasty or thoughtless – care should be taken to be as accurate in responses as possible.

**Method Two: Strategic Diversity Audit**

The Strategic Audit approach is a recommended for any serious DEI initiative. Without it, efforts often fail because initiatives and activities are not in coordinated alignment to the realities and status of the organization. They are simply “movement”, not momentum, and they falter over time. The Strategic Diversity Audit is conducted with a team approach, best suited to 3-5 individuals including some or all of whom are diversity representatives. The following list provides the key activities:

* A specific timeline must be set out (typically no more than 3 months in duration).
* The first meeting is focused on customizing the Audit Tool – adding or deleting specific items, and discussing how the data will be collected, and by whom.
* Specific audit responsibilities assigned to specific team members. Those team members may be able to answer the Audit questions directly, or they need to capture data from another source or expert, or design a survey or, in some cases, request a raw data pull.
* A letter explaining the process to the board or organization leadership should be determined at this point.
* Periodic team meetings are held, with members bringing findings, including actual documents.
* In order to convey a sense of accuracy to the process, it is recommended that team members collect and bring the content, but that the Audit questions are filled out and agreed upon by the team.
* All source data is dated and archived.
* Presentation of the findings should be factual and is used to drive future diversity workstreams (see pg. 1) and to identify progress over time.
* What should be published – and to whom – is best determined through collaboration between the committee and leadership. We have most often seen this decision made upon viewing the data and assessing what

*Note: A Pulse Diversity Audit is not necessary, whereas a Strategic Diversity Audit is. The former can be an initial step that is added to support momentum toward the second.*