

Measuring Progress

KEY TOPICS

assessment
 awards
 baseline
 benchmarks
 causation
 correlation
 data
 demographics
 EDI
 exit interviews
 goals
 hypotheses
 Ladder of Competence
 metrics
 net promoter score (NPS)
 pipeline
 qualitative measurement
 quantitative measurement
 return on investment (ROI)
 surveys
 workplace climate

It is said that if you can measure it, you can manage it. Identifying actions an individual employee, a firm, or the profession can take that will most move the needle starts with establishing goals, strategies for meeting them, and the metrics to help evaluate progress and adjust course. Using a metrics framework helps keep leaders and employees engaged and the profession achieve its goals.

This guide outlines ways of determining what issues underlie the use of metrics as well as how to measure progress toward the resulting goals.



The University of Washington for the American Institute of Architects Equity and the Future of Architecture Committee

What is measuring progress about?

To truly advance equity, diversity, and inclusion (EDI) requires being able to measure progress as a result of the strategies an individual, a firm, or the profession has chosen. These strategies have been discussed in previous guides and may include EDI programs and training, mentorship and sponsorship, workplace culture and flexibility initiatives, recruitment and retention practices, equity in compensation, and community-engagement methods.

Gathering data is a crucial first step, followed by identifying areas of focus, setting goals, analyzing data, designing strategies, and measuring changes. Metrics can help inform the development of initiatives and establish baselines; subsequent, regular measurement can help track the impact of those initiatives over time to allow progress to be acknowledged, programs and activities modified, and new goals set.¹

Basic demographic measures related to diversity in recruitment and retention are a good starting point. (See the Resources section of this guide.) Nonetheless, demographic measurement should not take the place of more extensive and meaningful information that can be difficult to measure but that provides greater insight into the degree to which employees are experiencing equity and inclusion. What is measured will vary by firm, depending on the desired goals, but these goals could include:

- increased commitment of leaders to equitable practices
- improved climate and culture
- increased evidence that employees feel that the workplace is equitable and inclusive
- greater job satisfaction

- improved employee engagement, well-being, and sense of belonging
- increased retention
- more favorable exit interviews
- fewer grievances (due to improvement in climate, not repression)
- elimination of occurrences of overt discrimination
- less evidence of unconscious bias
- eliminated patterns of interpersonal aggression and perceived microaggressions
- decrease in pay disparities
- improvement in diverse hiring, promotion, and retention at every level of the organization
- more diverse clients and consultants
- more dollars spent with women- and minority-owned businesses²

Measuring and making progress will help increase employee engagement and psychological safety, raise transparency, and improve accountability in the workplace and support retention in the profession. (See the *Workplace Culture* guide.) These improvements are also likely to have an impact on firm reputation, productivity, growth, and profit, and ultimately help the profession and the wider community, for example, through deeper engagement with communities and the use of consultants from more diverse backgrounds.

Metrics are most effective when they have the full commitment of workplace leaders, are discussed transparently, and are updated and refined over time. For firms that truly integrate equitable practices into their business model, self-reflection and metrics on equity will be as commonly discussed as the firm's financial results, design awards, or sustainability efforts.

Indicators of progress can be quantitative (e.g., how many...? what rating?) or qualitative (e.g., why do people leave?). Quantitative and qualitative data both have benefits, which are complementary. Quantitative measures, when standardized and tracked consistently over time, can indicate progress or allow comparison with benchmarks and profession-wide data. Qualitative data, with their richer responses about perceptions and stories of experiences, provide context for the quantitative data and contribute hypotheses and ideas for action. Both kinds of data can be explored using a variety of methods, including regular climate surveys, focus groups, and exit interviews (when they are structured to yield honest feedback); payroll, work-hour, vacation, and turnover statistics; client surveys; direct observation; and formal or informal conversations. Firms most often rely on informal methods to explore human-resource issues. However, those who conduct more extensive and formal research may be less inclined to misinterpret or dismiss either qualitative or quantitative findings.

When identifying areas to improve, determining what strategies to employ, and assessing whether these strategies are effective, it is important to recognize the difference between causation and correlation. Causation indicates that one change directly and conclusively causes something else to occur. Correlation indicates that there is a relationship between two variables but does not suggest that one definitively causes the other. Causation is therefore more difficult to determine. For example, gathering information on employee experiences and perceived impacts of one recently implemented program to improve equity can help determine whether that program may have directly led to (i.e., caused) an improved equitable atmosphere. By contrast, implementing six different strategies for recruiting and noting that your demographic numbers change, may indicate a relationship (i.e., correlation) between the strategies and the result, but it will not be possible to know which, if any, of the strategies made the difference. In either case, it is also necessary to take a broader look at what else was happening at the same time—perhaps a new project manager is assigning tasks more equitably, or the general office atmosphere has improved because of a new project—before absolutely assuming either causation or correlation.

Existing assessment instruments can provide detailed data and insight into discrete goal areas. For example, one of the most robust measures of the development of intercultural competence is the Intercultural Development Inventory (IDI, as discussed in the *Intercultural Competence* guide), which can be useful for individuals, teams, or organizations. (See the Resources section of this guide.) Some local and state AIA components have used IDI-based training for intercultural leadership specific to architecture.³

In the United States, the architecture profession currently has a number of sources of profession-specific data, including the biennial AIA Firm Survey, the AIA Compensation Survey, and the Equity in Architecture Survey conducted by Equity by Design (EQxD), the 2015 AIA Diversity in the Profession of Architecture survey, and NCARB by the Numbers. (See the Resources section of this guide.) These data sources can offer ideas for lines of questioning as well as provide context and benchmarks for evaluating one's own firm and individual situation. These surveys contain various kinds of demographic information about people of color and women in architecture, as well as their self-reported attitudes, perceptions, and experiences in the profession. The AIA Firm Survey offers demographic data, including firm sizes, sectors, and market trends; the AIA Compensation Survey offers data on workplace culture through benefit-related questions; the AIA Diversity survey focuses on perceptions of support and opportunity; and EQxD complements these efforts with deep dives into career pinch points, work-life conflicts, gender, sexuality, and race.

“There’s no short-term fix for a problem that has existed for many years. If there’s that long-term commitment, and it’s been measured, then you can see that progress. It helps everybody stay committed to being able to arrive at that ultimate goal.”

Senior Architect/Project Manager, African American, Male, 49

The AIA Center for Practice stewards a benchmarking tool covering attributes of prosperous practice including metrics for service to clients, the community, the profession, and a firm's workplace culture. Demonstrating a model for embedding equity into a cross-organization adoption of benchmarking. In 2019, the AIA Board of Directors adopted the COTE Top Ten framework as the AIA Design Excellence Framework. Critical to the success of these programs is the collection of diverse responses as well as the disaggregation and analysis of that data. New tools, as well as existing ones, like the AIA Small Firm Exchange (SFx) Business Models for Small Architecture Firms dashboard and the AIA Salary Calculator, have the potential to be used to advance equity goals if additional, equity-related questions are asked. In addition, the AIA's partnership with Women's Leadership Edge (WLE) led to a 2019 survey that enables a comparison of architecture with other professional fields.

Ratings and awards programs provide incentives for sharing information. One model for equity metrics may be programs that promote energy performance in buildings, such as LEED or AIA COTE Top Ten. Some AIA components require reporting on energy goals for all honor-award entries, which allows for tracking at the regional level; programs and award entries could include reporting on equity goals as well.

The AIA's 2030 Commitment helped rally firms around energy reduction. The accompanying tool, the Design Data Exchange, provided a method for tracking progress at the firm level, as well as overall program evaluation by the AIA. The AIA Center for Practice is coordinating the effort to help generate reliable benchmarks and display progress toward larger goals across several firm benchmarks.

Why is measuring important?

Measuring the current state of EDI is essential to leading change, regardless of the current baseline levels of awareness or knowledge. Data can make the strengths, challenges, and weaknesses within a system apparent to allow these factors to be acknowledged and potential solutions designed. Effective strategic plans often include metrics to clarify the connection between strategy, measurement, and achievement, and any firm that sincerely intends to make strides in equity needs to incorporate equity metrics into its fundamental planning. Metrics can be a helpful lagging indicator of what is working or not, or they can be a leading indicator of likely success. They can serve as a reflection of the firm at a point in time, and they can actively drive behavior and result in change.

In “knowledge work,” such as architecture, organizational self-awareness is a first step toward understanding what kinds of work most drive value in a firm, enabling the work to be structured and employees guided toward what is most productive. To understand what employees are doing—or could be doing differently—requires more than typical quarterly, monthly, or even weekly financial and operating metrics. When work, processes, and teams are structured in a way to give all workers access to the context, tools, and support they need—including elements presented in the other guides, such as a positive workplace culture, intercultural competence, appropriate and equitable compensation, flexibility, and access to mentors and sponsors—they can focus their individual and collective energies on the most effective drivers of business value.⁴

Individuals also benefit from the practice of measuring, not only as a way of tracking their own progress and development but also because of the broader changes that can result from their employers’ ongoing data collection, assessments, and goal setting. Firm-wide changes inspired by data can lead to healthier workplaces, greater satisfaction and meaning in work, and opportunities for career growth. When a firm gathers data sensitively and confidentially about the more challenging aspects of EDI and firm culture, such as harassment, interpersonal aggressions, or other evidence of bias, and acknowledges and addresses these aspects with its employees, employees will feel greater comfort in bringing forward concerns about biased behavior and instances of harassment, discrimination, or abuse. If these concerns are attended to in ways that meet employee expectations, the results will likely be visible in employee-satisfaction measurements that refer specifically to these types of incidents.

EDI metrics and the resulting strategies can also help highlight ways in which the profession as a whole is reaching (or failing to reach) potential clients, user groups, and aspiring architects; improving relationships with project stakeholders; and increasing the recruitment pipeline. Perceptions of diversity by external stakeholders are becoming increasingly important. For many years, the federal government has required reporting the number of minority- and women-owned businesses working on federal projects. Publicly funded projects or those for nonprofit clients sometimes use diversity as a criterion for evaluation. Large corporations who hire consultants, such as Microsoft and 3M, have recently been requiring diversity demographics to be included in proposals.⁵ And in general, broadcasting progress can help enhance public awareness and understanding of the profession.

When done in an intercultural competent manner, taking stock of where an organization stands initially with respect to EDI, implementing strategies for improvement, and tracking progress over time can have a number of results:

INDIVIDUALS

Workplace culture · Measuring for equity and inclusion can indicate which strategies are working and which strategies need to be improved. When metrics drive positive change, they produce happier and healthier workplaces, stronger engagement, and greater work satisfaction for all employees.

Career development · Firm and profession-wide data help employers and organizations set goals and develop strategies that improve retention and promotion, thereby creating greater opportunities for members of currently underrepresented groups.

Employment decision-making · Individuals make employment decisions, in part, on the basis of information provided to them by prospective employers. Knowing the EDI metrics of a firm gives prospective employees the opportunity to ask additional questions and encourages transparency on the part of the firm.

Necessary conversations · Data are helpful as a catalyst for hard conversations. They remove the onus of proving that issues are part of a larger pattern and therefore need to be addressed systematically from individuals.

MANAGERS

Reduction of bias · Well-designed assessment tools reduce the influence of bias in the EDI discussion and allow a more objective study of the issues and the design of practical solutions based on evidence rather than conjecture.

Clarity · Results can provide clarity to a supervisee about where to focus attention for the greatest positive effect.

Assessment · When supported by data and goals, a firm-wide commitment to advancing equity and inclusion can be translated into concrete individual-performance goals for managers.

FIRMS

Awareness · Measuring for EDI indicates when pressing issues need to be solved, keeps EDI on firm leaders' radars, and highlights the potential and ongoing value of initiatives.

Problem identification · Metrics pinpoint problems and barriers experienced by various groups or individuals in the organization.

Commitment · Concrete metrics can provide the evidence leaders need to become committed to change. When metrics, goals, actions, and results are conveyed to employees and especially when employees take part in the process of designing solutions in the first place, that commitment becomes believable.

Change management · Assessments reveal organizational strengths that can be leveraged in the process of change.

Reputation · Transparency about results enhances credibility and firm reputation, especially when less-than-positive data are published without defensiveness or excuses.

Accountability · A firm-wide EDI program that is grounded in data can be translated into expectations of individuals and teams and can become the basis of evaluation, compensation, and promotion.

PROFESSION

Leadership decisions · Aggregated, profession-wide data help inform the entire profession about current EDI challenges in firms and focus attention and resources on areas in the industry with the greatest need.

Visibility · Metrics can help set benchmarks for improving equity and inclusion and building greater diversity in the profession. As equitable practice becomes more common, architects will increasingly be seen as effective professionals. And as diversity increases and with strong role models, architecture and architects will become more visible to underrepresented groups as a potential career option.

Public perception · Measuring EDI in the profession, being publicly transparent about results, and developing strategies for improvement can build a more favorable impression of the profession and its commitment to change.

“If you’re not measuring, you’re just talking;
and if you are measuring, do something
with it.”

Architect/ Large Firm Practice Leader,
White, Female, 40s,

Measurement is more effective when...

KNOWLEDGE

firms and the profession at large know the baseline state of EDI

firm leaders are open-minded about metrics, even if the findings contradict their perceptions

quantitative and qualitative metrics are understood and valued

equity goals take priority over diversity statistics and are connected to firm-level values and plans

INVESTMENT

leaders make a long-term commitment of time and energy to track metrics regularly and consistently

data are used to determine needs, develop strategies, set goals, and track progress

metrics are actively revised as needed

leaders consider the benefit and cost (to both firms and their employees) of measurement strategies

SENSITIVITY

steps are taken to protect individual identities, especially if a firm is small

employees understand the value of data but can opt out of participating and do not have to share information they consider private

intended use of data is clear to all survey participants

sensitivity is not used as a justification for ignoring or not sharing data

Compliance

The information that follows is intended only to provide general guidance as to the considerations the authors believe are important, with respect to collecting, storing, and sharing demographic information. However, it is equally important to take into account your own business practices and operations, as well as the applicable local laws, regulations, and best practices in your jurisdiction and area of practice. As with all things pertaining to your business, you should consult your own experts and legal advisors as to your specific and unique set of circumstances.

The collection, storage, and sharing of demographic information about employees are critical to furthering equity, diversity, and inclusion within design firms and across the architecture profession. These practices, however, can raise legal, ethical, and prudential concerns.

COLLECTING AND STORING DATA

Collecting and storing demographic data pertaining to your employees can yield many benefits, including when provided to your greater professional and business community. However, the same demographic data can be—and have been—used improperly by companies. How employers collect and retain such information should, therefore, be considered carefully because it can lead to unwanted legal exposure and risk as well as damage to organizational reputation. Employers would be well advised to proceed carefully in this area, and only after having consulted with their legal counsel. The following is intended for general guidance only.

- An employer may generally obtain certain types of information (such as gender and date of birth) from an employee to be maintained on a confidential basis in that individual's personnel record for employment-related purposes. Such purposes may include, but are not limited to, identification and verification, tax and withholdings, and payroll.
- Certain government agencies may encourage, or even require, the collection of certain data. The U.S. Equal Employment Opportunity Commission's (EEOC) voluntary EEO-1 Survey (which certain employers must file with the EEOC annually) is one guide on how the federal government seeks voluntary demographic data (i.e., gender and race) of employees. For an introduction to the EEO-1 Survey, go to <https://www.eeoc.gov/employers/eeo1survey/about.cfm>.
- If an employer collects sensitive data (on factors such as gender, race, and age) in other contexts, the employer should first check the applicable laws

and regulations in its jurisdiction and consult with its attorney and experts to ensure compliance. As a general rule, following that verification and assuming it makes sense to proceed:

- An employer should ensure that an employee's participation in collecting such data is completely voluntary. The employer should make clear that there will be no retribution if an employee opts out or refuses to share information.
- An employer should provide a clear, published statement of the intended use of the data to its employees. Once the information is collected, it should not be used in any manner that is inconsistent with the statement.
- There should be a clear, published statement of who will have access to the data. The statement should make plain that the information will not be shared with the employee's manager or with anyone with decision-making authority over the employee.
- The data should be stored in a manner that ensures that only authorized individuals may obtain access.

SHARING DATA

If an employer collects demographic data and wishes to share such data, again, it is important to check with your attorneys to determine applicable laws and regulations. As a general rule, assuming such verification has been done:

- A basic starting principle is that such data should be aggregated and should not include information that is identifiable to a specific individual.
- Some employers are required, or may choose, to share certain demographic information with federal, state, or local government agencies or with authorities outside the United States. An example of this is discussed in the EEO-1 Survey, which is referenced above.

- Aggregated, demographic information is sometimes shared with an industry reporting organization or by an industry or professional group, such as the AIA. As mentioned above, such data should not be attributable to specific individuals.
- Be aware that antitrust issues may arise if the data has commercial implications and could be used for anticompetitive purposes. This might happen, for example, if a limited number of small firms shared information on pay and benefits for certain categories of employees. The U.S. Department of Justice and Federal Trade Commission guidelines provide that compensation-/benefits-type surveys be conducted by a third party, that the data be at least ninety days old at the time of reporting, that at least five firms report the data, and that the data be aggregated so that no individual firm data can be identified and no one firm's dataset constitutes more than 25% of the reported figures.¹⁶ (The AIA's compensation survey data adheres to these standards and is the only compensation data report on the architecture profession used by the U.S. Department of Labor.)

Assess

AWARENESS

What do you currently measure, and how is it aligned with your equity initiatives? · How and with whom do you share your metrics? · What needs to change in your culture or systems to value and implement a practice of measuring?

Are your firm leaders willing to accept data that might contradict their perceptions?

Are you using qualitative and quantitative methods appropriately for the knowledge you seek? · Are you distinguishing between correlation and causation?

Is the connection between metrics, goals, and firm-level strategies and plans clear?

Do you use already-existing surveys and other instruments to help ensure the validity of your measurements?

Where is your firm on various measurement scales mentioned in this guide? (See the Act section below.) · Where are you individually? · Do you or your firm genuinely wish to advance?

INVESTMENT

Are you willing to make a permanent, continuous commitment to advancing EDI?

What resources do you have—time, money, capabilities—to engage in initial and ongoing measuring? · How are available resources being prioritized? · Who will lead the process, and who will participate? · Who is accountable for the results? · How will you engage underrepresented groups in the planning and implementation of change? · Can you invest in third-party researchers to help protect respondent anonymity?

What is your process for initial discovery of challenges, needs, and opportunities?

What systems do you have for monitoring progress and evaluating impact?

How have you embedded targets into firm goals, and are managers on board with the goals?

If training is a part of your EDI efforts, are you intentional about integrating one-time events into a long-term plan?

IMPACT

Have you determined how you will communicate targets, strategies, and results? · Do you share results, both positive and negative, transparently within your organization? · With other firms, AIA components, and organizations interested in equity in the profession—leading by example to help advance the field at large?

Do your EDI efforts have tangible, positive results for your employees, your workplace, and stakeholders outside of your firm? · Do you adjust your EDI program in response to ongoing metrics?

How do you define success for your firm? · What equity and inclusion metrics would indicate success? · How can you acknowledge and be accountable if there are negative results?

Act

INDIVIDUALS

Everyone is a part of the effort to measure and make change, whether as a participant or leader. Effective participation comes from those who know the goals, understand what is being measured, and anticipate how it will affect their firm or their role.

- **If you can, be an activist at your firm.** Armed with the knowledge that employees with target identities may be better positioned to take this role if they have strong allies, bring EDI concerns to management and leaders and push for making real change and measuring that change. Organize coworkers to help give voice to these issues with you. Recognize that there can be risks to speaking up, and use concrete data—quantitative and/or qualitative—as the basis of your discussion.
- **Be effective making the case.** Firms with a stated commitment to increasing equity may not see the connection between those goals and the need for measurement and transparency. The more accurately you can understand both the goals and what the obstacles may be to full transparency about metrics, the more effectively you can advocate for measuring and sharing.
- **Exert your autonomy.** If the purpose of the measurement is not clear to you, ask for more information. If it remains unclear or if you prefer not to share information you consider private, consider opting out.
- **Take stock of your own competence and have empathy for others.** This can help you choose how to frame your conversation about potentially sensitive matters. (See diagram on next page.)

MANAGERS

- **Make data meaningful and actionable.** Managers have the opportunity not only to collect data but also to make the findings meaningful to leadership in ways that lead to clear actions for change. Think through how to present the data and the solutions the data suggest would make the greatest improvement.
- **Be open to a different culture around sharing information.** If your firm has not routinely shared information within or beyond its borders, sharing can make your firm feel vulnerable. Making progress on equity in the profession will call for many firms being prepared to contribute to benchmarking and goal setting. Managers are key partners in knowing which metrics are meaningful and feasible.
- **Keep the process simple for employees.** Care should be taken not to overburden individual employees with the responsibility of providing data. Make the process of gathering and measuring data as simple as possible, without requiring additional tracking of information by an already-busy workforce.

FIRMS

Measurement becomes meaningful when it aligns with strategic goals and links clearly to actions. To become a diverse, inclusive, and equitable organization requires building a “measurement culture,” in which learning from data is a value and concrete data are collected and used to drive decisions, establish priorities, and modify activities and programs. Keep in mind that emphasis on diversity without equity and intercultural competence can be counterproductive. (See the *Intercultural Competence* guide.) Firms can benefit from data and should collect it in ways that are consistent with the firm culture and are respectful to employees.

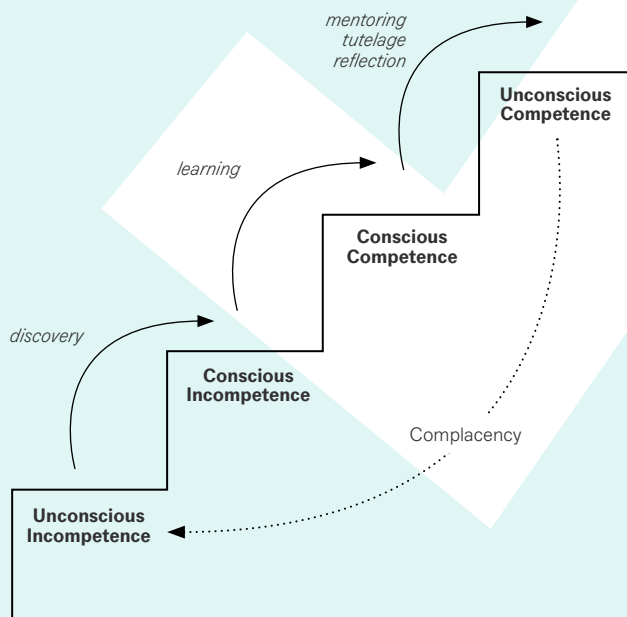
ESTABLISH YOUR BASELINE, AND DON'T STOP THERE

Progress is measured relative to your starting point. Wherever you are, there is always room for improvement. In some ways, progress may occur more quickly for those just starting out than for firms that have already embarked on long-term efforts.

→ Determine your firm's baseline knowledge.

Creating a EDI program begins with determining the level of baseline knowledge. One example of an informal tool is the Ladder of Competence, which can help appraise the “rung” of an individual, team, leader, firm, or a profession, from unconscious incompetence (not being aware of problems related to lack of diversity, exclusion, or inequity and being ineffective at addressing them) up the ladder to unconscious competence (knowledge and action are so honed as to be natural—or perhaps complacent). Some members of a firm may be farther along than others and can help others learn. For instance, employees who notice and recognize when their colleagues are experiencing inequities, exclusion, or microaggressions can act as allies and educate firm leaders, who may have matured in a homogeneous system and who may be “unconsciously incompetent” in matters of EDI. (See the *Intercultural Competence* guide.)

Understanding the starting point helps those who wish to initiate EDI conversations and efforts frame



THE LADDER OF COMPETENCE

The Ladder of Competence is a simple tool for identifying degrees of awareness and capability and can help individuals and firms recognize where they stand, where they need to develop, and how they might frame their persuasive arguments to address EDI needs.⁶

their case appropriately. Other frameworks for evaluating your organization's knowledge and level of action and initiating EDI conversations include IDI, Harvard Project Implicit, the Antiracist Transformation Continuum, and the APTMetrics Stages of D&I Evolution.⁷

→ Track demographic data to measure and advance diversity, but commit to equity and inclusion.

Tracking race, gender, ethnicity, age, sexual orientation, disability and their representation in applications, hiring, retention, and promotions is only the most elementary step toward determining whether EDI goals are being achieved. By paying attention to more than just numbers, you send the message that individuals matter and that you want to understand employees and where you need to improve on equity and inclusion.

→ Getting at the reasons behind any lags is then the more holistic, meaningful, and complex route to creating an inclusive and equitable workplace. And in every case, it is crucial to demonstrate willingness to act on the results of your research, no matter what you find.

→ Go beyond counting demographic numbers and gather qualitative data to learn what the most significant issues are, and for whom. Use focus groups, exit interviews that are as direct and honest as possible, and non-judgmental conversations with employees to help you build hypotheses about where the greatest needs for change are, which you can then explore further.⁸ If you can ensure anonymity, follow up with employee pulse surveys (also known as workplace culture, climate, or employee satisfaction surveys) to understand the environment for different demographic groups and areas of practice. Learn from clients and consultants as well. Keep in mind that measuring diversity simply tells you “how many” and by itself does nothing to advance your equity goals. To achieve equity, raise your sights beyond counting numbers to see if you are managing your diversity in such a way that your “differences make a difference.”⁹ (See the *Intercultural Competence* guide.)

→ Use historical data to analyze representation and turnover. Also go beyond “how many?” and explore not only who is being recruited, hired, and promoted but also who is leaving and why. Use employee engagement surveys and exit interviews or surveys, or consider hiring an outsider if your firm is small to learn how employees feel about your work environment. Do they feel included? Do they believe they can fulfill their personal goals and ambitions? Do they feel heard and valued? Are members of target groups leaving sooner than others? (See the *Intercultural Competence* guide.) Use the Resources section of this guide to find useful questions.¹⁰

- **Do your best to ensure that you are hearing real answers, and listen without filtering.**¹¹ Both current and departing employees may be reluctant about being completely open. Think carefully about who can ask the questions most effectively. A general culture of openness and trust will help employees be direct. Recognize that firm leaders and employees may have very different perceptions of how things are and what is working; leaders need to be willing to listen. Some employers who are willing to listen can feel frustration when employees aren't direct.
- **Once you have listened and have evaluated your findings, choose only one or a few issues to address first,** and design strategies and interventions to tackle them over time. Spend time with your employees to fill in the answers to “if we measure, track, and address nothing else, it should be ____.” The answers will be different for each firm. When you have your list of what to measure, figure out what metrics will deliver the information you need to track progress. Especially where resources are limited, it makes sense to choose just a few meaningful metrics and create strategies to tackle them.¹²
- **Engage diverse leaders, managers, and employees at all levels in developing strategies and solutions,** as perceptions of what is needed and what will work may vary significantly depending on perspective.

USE EQUITABLE AND SOUND DATA PRACTICES

Discussions that are equitable, inclusive, and transparent about gathering data, setting measurement standards, and determining best methods for analysis can assuage anxiety. Ensuring that your efforts follow best data and privacy practices is key to your credibility and, more importantly, the usefulness of the information. When considering why and how to ask questions, refer to the Compliance section of this guide to understand how to handle sensitive information.

- **Be precise about the goals you are setting and who and what you are measuring.** Rather than merely stating “we need to be more diverse” because you have counted diversity metrics, you might learn, for example, by exploring further, that you need to increase inclusiveness among midcareer professionals. Delve further to determine one or two root causes for the sense of exclusion and try out strategies that address those causes.
- **Be clear about how data will be used,** and allow participants to opt out if they do not wish to respond.
- **Communicate your intent, goals, and strategies often and throughout the organization.** Hold leaders and managers accountable for results: this is a key step that is sometimes overlooked. One

way to establish accountability is to build goals and strategies into the work plans and evaluations of leaders and managers (e.g., employee's ratings or evaluations of managers' inclusiveness), and link results to compensation and promotion.

- **Keep responses anonymous if possible.** In larger firms, well-facilitated and safe focus groups and authentic exit interviews (in some cases, more effectively conducted by a trusted peer or neutral third party) can reveal problems and root causes. These issues can be explored further in anonymous surveys. These methods may reveal employee perceptions and experiences, with the data organized by demographic groups to determine what may be contributing to, for example, greater attrition among underrepresented groups. (See Tools, Checklists, and Examples in the Resources section of this guide for detailed examples of surveys and questions.)
- **Maintain confidentiality, especially if anonymity is not possible.** In small firms, anonymity is difficult to attain; leaders can establish an atmosphere of trust and honesty to encourage employees to feel that they can be open. (See the *Workplace Culture* guide.) Demonstrating vulnerability and a willingness to listen without disputing or countering employees' perceptions will help ensure genuine responses. One-on-one conversations must be confidential to maintain trust (with the exception of certain situations that must be reported, as described in the Compliance section of the *Workplace Culture* guide). In some cases, when feasible, it may be preferable to engage a neutral individual—internal or external—to hold conversations with employees, individually or as a group, to explore the positives and negatives of a firm's culture.
- **When analyzing data, disaggregate it** to understand differences between subgroups and the larger population, if your survey group is large enough. This level of analysis will help you pinpoint areas of need.
- **Use interest groups to aggregate data and preserve privacy.** For example, several small firms or organizations could amass their survey data together, protecting anonymity while also generating valuable information which they can use to create clusters of data for study and comparison.

INVEST IN SUSTAINED EFFORTS

The work required in sustained efforts demands long-term commitment and is evolutionary. Select key metrics and continue to measure the same ones to evaluate progress over time, only revising the metrics when making major strategic shifts or when seeking a greater depth of knowledge.¹³

- **Talk about your equity goals as often as you discuss your profitability.** Make them a central topic. Reinforce the link between your business goals and equity goals by regularly discussing and refining the connection.
- **Recognize that EDI is much more than just “accommodations”** for specific groups. Equity is a benefit to all firm members and stakeholders that enriches everyone’s experience.
- **When you make policy and program changes that are components of your overall EDI efforts** (e.g., flexible work schedules, leaves, disability accommodations), track how many and which staff members have made use of these policies and programs and to what extent. Measure the impact on workplace climate, employee satisfaction, and job performance.
- **If you offer skills training as part of your EDI plan,** track how many people take the trainings and how they evaluate the outcomes over time. Among people in managerial positions, measure what difference training makes in their hiring and management.
- **Starting with baseline measurements, set targets with timelines** to allow progress to be measured over time. Integrate targets and strategies with your strategic and operating plans. Ensure that your targets are realistic and achievable, and that the people responsible for tracking or achieving them have the resources and control they need. Create interim goals with smaller steps to help build momentum and support.
- **Consider reporting in “goal corridors,” showing whether your progress is slow, moderate, or significant.** The ranges for each metric will help pinpoint the areas that require greater attention or adjustment.¹⁴
- **Measure progress at regular intervals, share results widely, and celebrate gains.** Transparency will help employees recognize management’s intentions and help them engage in assessing alignment between intentions and impacts.
- **Adjust strategies as goals are met—or as they aren’t.**¹⁵
- **Know who is keeping track and what they are finding.** Support national and international efforts to gather data on equity in architecture and the building industry. Work toward sufficient information to allow comparison between architects and other professionals, knowledge workers, and designers to see how architecture is trending in relation to similar professional fields (e.g., AIA’s partnership with Women’s Leadership Edge).
- **Share data, goals, and best practices.** Architecture is not alone in measuring progress toward equitable goals. Professions can learn from one another and help everyone advance.
- **Inspire owners to follow the example of the public sector in seeking greater participation by women- and minority-owned businesses in their projects.** Federal, state, and local governments have led the way in many instances by requiring or encouraging certain levels of participation by women- and minority-owned business in projects they fund. The AIA could encourage private owners to do the same.
- **Include EDI standards among the criteria for awards and recognition.** Awards programs, such as AIA COTE Top Ten and Architect Magazine Top 50, recognize factors that the profession values. Expanding those to include metrics relevant to EDI could offer positive steps toward creating awards for the greatest impact or improvement in diversity and equity. The AIA’s ongoing efforts developing a firm benchmark will be invaluable in advancing these goals.

PROFESSION

The profession has many goals that can be facilitated and accelerated with data that improve the understanding of what matters to diverse prospective and current professionals and what needs to change. While the efforts have been ongoing for many years, gaps remain.

“What metrics could we use—success metrics or retention metrics? What are the ways to help the industry look at and evaluate them? It may not hit your bottom line, but it might hit trends in recruitment, retention, and the health of the organization over time. Since we reorganized the firm, our profitability is up significantly. It’s not directly linked to diversity, but our diversity numbers have also gone up, so there’s an interesting correlation there.”

CEO and Owner, White, Female, 59

Consider

INTENTION AND IMPACT

I find out there's an unannounced meeting happening off-site, and I'm very curious: what is going on here? I look at the sign-out log and I see the names of about twelve, middle-aged white men. After a little research, I realize that the firm is secretly rewriting its mission, vision, and values. And there's not a single woman included. Later, in the office of one of the principals, I asked, "Did red flags not go up when you sat down, looked across the table, and saw that everybody looked just like you"? He looked at me, and said, "It wasn't intentional." I said, "Well, it's time to get intentional."

You get to the point in your career when you're just so angry that you're still talking about this and having to suggest that firms be more inclusive. It's the feeling like you're treading water and that you're never going to reach the shore. I couldn't take it anymore. I did what I could to get the firm to study the problem, then told them I had to move on. I've since learned that they've been making progress. In retrospect, should I have stuck around to see it through?

— Senior Design Architect, White, Female

DISCUSS:

- In what situations would the speaker's response to the firm leader who said "it wasn't intentional" be effective? As an employee speaking to a firm leader, would you feel comfortable saying this? What results would you expect in the moment and later?
- Would you read the situation differently if the meeting were openly announced? Do you think the principals were trying to keep the meeting secret, or were they unaware of the potential impact of their meeting on others in the firm?
- How could this firm have used metrics to study and improve its processes?
- What is the connection between intention and impact, and between equity and inclusion?
- If your values don't match those of the firm, what factors would encourage you to stay? When would it be better for you to leave?

Consider

THINKING BEYOND THE NUMBERS

We had lost jobs because, as we used to think of it, we didn't have "one of those." At the time, we just thought about the numbers. But the way we look at it now is so much more. It's not about the numbers in terms of percentage of this and percentage of that, it's really about the richness of the work. And that seems to work better in conversation, both internally and externally. People are more comfortable talking about the richness of the work than about percentages. I think it goes back to the whole genuineness question. For us anyway, thinking about the richness of the work that way has made the firm a lot better than when we were just thinking about numbers.

— President/CEO, White, Male, 61

DISCUSS:

- What is your reaction to the phrase "one of those"? What kind of progress do you see indicated in this story? How would you measure it?
- What do you think the speaker meant by "richness" and by the "genuineness question"? Why do you think he says it is more genuine to focus on richness instead of numbers? In what ways do you imagine his firm may be better now than when they were just thinking about numbers? How might thinking about the richness of the work lead to greater inclusiveness in a firm? In what ways could your firm advance the internal conversation from diversity demographics to equity and inclusion matters?
- What are the limitations of only measuring demographics and diversity? What connections do you see between demographic measures of diversity and richness of work? Will more diverse demographics automatically produce better work?
- Do you think that some clients are looking for "one of those"? What is your reaction to this idea? If there are such clients, how could architects help them recognize the value of including diverse backgrounds and perspectives?

Consider

HONEST STORYTELLING

What I'm finding is that people don't want to be honest and tell a bad story. People want to say, "Hey, look how great we're doing, we're really making progress." That progress might be very small, very incremental, but they always want to talk about the progress versus saying, "Look how far behind we are." As soon as we can get comfortable with the bad story, we can rewrite it. We just have to be honest with ourselves—inside the corporate communications, websites, whatever it is. That includes anything from pay equality to race and gender—to everything. We just have to tell a better story, and we have to be honest about what that story is. That's what we struggle with as an organization.

— Principal, White, Male, 48

DISCUSS:

- What is the story of EDI at your firm? What forms of communication do your firm leaders use to tell this story? If your firm tracks EDI metrics, do you feel that the firm is transparent about the results? Do you feel that the story is honest? Where does it need to be more accurate or direct?
- Are there positive aspects to learning about or telling a negative story? Does there need to be a choice between celebrating wins and openly acknowledging how much farther you need to go?
- Has there been a time when your data—qualitative as well as quantitative—told a negative story? If so, what were the ensuing conversations like? If not, did it affirm what you knew or reveal new information?

Consider

WELCOMING REGARDLESS OF STATISTICS


A couple years ago, I got a call from a large firm looking to get me to join them, so I looked at the website and it had key people—seasoned professionals probably in their sixties. I didn't feel welcome, just from looking at the website. When we talk about diversity and inclusion, gender, race, statistics are one thing, but if you walk into a room and you feel welcome, it doesn't matter if their ratio is ninety to ten. If you feel welcome, you feel like you belong there. In the interview they told me: "Your resume is impeccable, we want you to come mentor younger staff here."

After the interview I sent an email: "Can you tell me what you're doing toward equity, diversity, and inclusion in your firm. What roles are people playing, and have you had any achievements over the last few years?" It took a few days or a week for them to get back to me, and when I got the response, it looked like they had done a copy and paste because they were not prepared for that question.

You can't be a multinational firm and be waiting for the AIA or some focus groups to charge you with making EDI progress. You have to lead and create this change. There are some firms that do celebrate diversity on social media or on their website. Those firms have to keep celebrating those things for others to catch up and make it the norm.

— Senior Architect/Project Manager, African American, Male, 49

DISCUSS:

- How well prepared is your firm to answer the questions asked in the speaker's post-interview email? How many people in your firm would be able to answer this? Is it important that their answers are consistent?
 - How could this firm have used metrics to study and improve its workplace environment?
 - Does your firm celebrate improvements in EDI? If so, how do they celebrate these improvements? Is the primary motivation for celebration to inspire others or benefit internally?
 - Have you been in situations where the demographics were not diverse but the sense of belonging for people from underrepresented groups was strong? What kinds of metrics would mask or reveal this apparent contradiction?
- 

Consider

EFFECTIVENESS OF EXIT INTERVIEWS

It was noticeable across the staff that there was a tendency among male designers to really question women's work more than their own, sometimes to the point of tears. At some point, you realize that's not the way you want to practice, no matter how great the design is. No one wants to be in tears at the end of the day. That was why people left.


To me, the harassment was the first thing I didn't expect; I haven't encountered it as much as I did at that office. I think it was because they didn't have an HR department (which is not uncommon at a lot of architecture offices), and there weren't a lot of people to report to about it. Harassment felt like a culmination of how women were treated in design sessions; and in a small setting where you have that one-on-one interaction, there was the reinforcement that, "Well, I'm here, let me just pat you on the side and that will take care of it." It was an unfortunate dynamic.

They hired a consultant to debrief and interview the six of us, all women, who left in one year. I don't believe that the reason people left led to a high-level leadership team conversation. I don't think they actually addressed the issue.

One of the senior leaders was vocal in saying that they needed an HR committee to which complaints could be reported openly. Architects tend to use committees, and they are trying an HR committee now, but it's not really working. Things changed, too, when one of the partners passed away: he had been actively trying to get women in leadership there. The two main principals there now aren't quite as concerned.

— Architect, White, Female, 30s

DISCUSS:

- When looking at who left a firm during a short period of time, when do you consider the departures to be a series of individual events or a part of a pattern? Is there a threshold or percentage that triggers concern (for example, six women leaving in a small firm compared to a large firm)?
 - Does your firm have a way to distinguish between correlation and causation in looking at the numbers of people who leave and their reasons for leaving?
 - How could this firm have used metrics to study and improve its workplace environment?
 - Was the debriefing by the consultant counterproductive? What is the process at your firm at exit interviews? Has your firm made any interventions or developed EDI programs based on exit interviews? If a firm conducts exit interviews, what message does it send when it doesn't appear that the answers make a difference?
- 

Consider


CHECKING ASSUMPTIONS

When I started at the firm, there were no active women partners. That was very discouraging and notable and was really the impetus for starting to question and act. A group of women sat at a bar complaining, and then said, “What if we tried to do something constructive?” And we got a lot of support to act. We knew that a number of women had left, and we had no women partners or women in senior leadership positions. There was some assumption that this was inherently biological and that women were leaving to have babies, so we wondered where they went after leaving. We followed up with them and traced them to other firms. One works for a developer. All of them went on to competitive, demanding positions. They had taken family leave, all of them came back to work. It was an example of assumptions versus actual.

One amazing thing is that when we did our research and found out what women were discontented with, we found they were not women-specific issues, like “I don’t get enough maternity leave” or “no lactation room.” We found they were human issues. In the past ten years, the firm has changed significantly. Now there’s a partner-led talent equity, diversity, and development committee that meets regularly and talks about all the issues that we found ten years ago, all those issues about transparency, about understanding who’s in charge, how promotions are made. We overhauled our entire evaluation process to make it more transparent, more legible. I think that has had a huge impact on anybody who is perhaps marginalized. And it wasn’t specifically gender issues but has had an impact on diversity of all kinds. All of that has permeated the firm. It’s a larger cultural issue. Not that we’re done, but the conversation has really changed.

— Architect/ Large Firm Practice Leader, White, Female, 40s

DISCUSS:

- What was this group's initial question or hypothesis? What kind of research did they do to explore it? In this case, what kind of questions do you think were effective in eliciting results that disproved those assumptions? Are there assumptions in your office that may be preventing you from fully understanding a situation?
 - This story begins ten years ago and talks about how things are now. What do you imagine might have been some of the steps in between? What steps would you take in this situation?
 - Are there aspects of this story that can help you make the case for starting a focused inquiry that ends up benefiting a broad range of individuals and groups in your office?
- 

Resources

DATA SOURCES

NCARB By the Numbers – NCARB (2019)

<https://www.ncarb.org/nbtn2019>.

Demographic data and analysis of licensure and career stages.

AIA Compensation Survey – AIA (2019)

www.aia.org/compensation.

Reports salary and compensation trends, including data on forty-four architecture firm positions and details on benefits being offered at firms.

AIA Firm Survey Report – AIA (2018)

<http://content.aia.org/sites/default/files/2018-08/2018-AIA-Firm-Survey-Overview.pdf>.

Overview of general survey of architecture firms and industry trends.

Diversity in the Profession of Architecture, Executive Summary – AIA (2016) and Diversity in the Profession of Architecture, Key Findings – AIA (2015)

<http://content.aia.org/sites/default/files/2016-05/Diversity-DiversityinArchitecture.pdf>

<https://www.architecturalrecord.com/ext/resources/news/2016/03-Mar/AIA-Diversity-Survey/AIA-Diversity-Architecture-Survey-02.pdf>.

Summary of perceptions of factors that affect the choice of architecture as a profession, job satisfaction, and retention.

EQxD 2018 Survey Early Findings Report – EQxD (2018)

<http://eqxdesign.com/blog?category=Metrics>

Initial summary from Equity by Design of the largest survey regarding equity in the profession.

EQxD 2016 Survey Overview – EQxD (2016)

<http://eqxdesign.com/research-topics/>.

Findings from the 2016 survey.

Women in the Workplace – Lean In and McKinsey (2018)

<https://womenintheworkplace.com/>.

Survey of 279 companies and 64,000 individuals regarding the state of women in corporate America.

GENERAL GUIDANCE

“Assessing and Driving Change: Organizational Readiness and Success with Metrics” in *The Diversity Executive: Tasks, Competencies, and Strategies for Effective Leadership* – Michael L. Wheeler – The Conference Board (2001)

<http://michaelwheelerdiversity.com/spark/wp-content/uploads/2016/08/Diversityexecutivereport-1.pdf>.

Includes a useful diagram of the four stages of organizational readiness: exclusion, tolerance, acceptance, and inclusion.

How Can You Measure Diversity and Inclusion Results? Millennials Have an Idea – Anna Johansson – Forbes (2017)

<https://www.forbes.com/sites/annajohansson/2017/11/09/how-can-you-measure-diversity-and-inclusion-results-millennials-have-an-idea/#31c71ced2310>.

Presents a simple case and techniques for going beyond mere demographic-diversity data.

How to Measure “Inclusion” Qualitatively: Free Resources and Research Data for D&I Advocates – Michelle Kim – Awaken (2017)

<https://medium.com/awaken-blog/how-to-measure-inclusion-quantitatively-free-resources-and-research-data-for-d-i-advocates-47206a916005>.

Discussion from employee standpoint of how to evaluate and find inclusive company cultures. Links to additional data and resources.

What Diversity Metrics are Best Used to Track and Improve Employee Diversity? – Roscoe Balter, Joy Chow, and Yin Jin (2014)

<https://digitalcommons.ilr.cornell.edu/cgi/viewcontent.cgi?referer=https://www.google.com/&httpsredir=1&article=1063&context=student>.

Executive summary provides brief, practical guidance on a process for gathering and applying qualitative and quantitative data.

TOOLS, CHECKLISTS, AND EXAMPLES

An Antiracist Transformation Continuum for Organizations – The Episcopal Church (2011)

https://www.episcopalchurch.org/files/antiracism_book-revise3.pdf.

Resource includes a worksheet to help evaluate an organization's characteristics, practices, power position, and social-justice stance in relation to people of color.

Demystifying D&I Metrics – Mary L. Martínéz of APTMetrics (2013)

<https://slideplayer.com/slide/6191267/>.

Presentation from the SHRM Diversity & Inclusion Conference & Exposition. Slide 11 provides a table titled "Stage of D&I Evolution Should Impact What Is Measured." This table is a helpful source for connecting organizational objectives with the types of data that should be collected to measure progress.

Creating a Strategic Diversity Management Plan – SHRM (2012)

[subscription required]

https://www.shrm.org/resourcesandtools/hr-topics/behavioral-competencies/global-and-cultural-effectiveness/pages/strategicdiversitymanagementplan.aspx?_ga=2.131499655.924427241.1560207488-1139388716.1557859890.

Detailed guidance for action in sixteen components of inclusion and diversity.

Diversity Down to the Letter – Linda S. Gravett – SHRM

https://www.shrm.org/hr-today/news/hr-magazine/pages/0604babcock_measuring.aspx.

Basic ten-item checklist to help evaluate your current EDI program.

Diversity Metrics, Measurement, and Evaluation – Marc Brenman – Workforce Diversity Network (2013)

https://workforcediversitynetwork.com/res_articles_DiversityMetricsMeasurementEvaluation.aspx.

Comprehensive roadmap to making the case for and developing a qualitative and quantitative metrics program.

Intercultural Development Inventory – Mitchell Hammer (2019)

<https://idiinventory.com>.

Assessment of intercultural competence. Test evaluates mind-sets on a scale from monocultural to intercultural: denial, polarization, minimization, acceptance, adaptation.

Inclusive Economy Metric Set – B Lab (2019)

<https://kb.bimimpactassessment.net/support/solutions/articles/43000477312-can-i-download-the-inclusive-economy-metric-set>.

Detailed qualitative questionnaire dives into workplace culture and structure, especially with respect to equitable practices.

The Measurement of Work Engagement with a Short Questionnaire: A Cross-National Study (Appendix) – Wilmar B. Schaufeli, Arnold B. Bakker, and Marisa Salanova – Educational and Psychological Measurement (2006)

<http://www.wilmarschaufeli.nl/publications/Schaufeli/251.pdf>.

Presentation and analysis of a short questionnaire that measures work and well-being.

Measuring Progress – Project Include

https://projectinclude.org/measuring_progress#.

Important guidance regarding policy, transparency, and survey design and processes.

Setting Targets – Workplace Gender Equality Agency (WGEA) (2018)

<https://www.wgea.gov.au/topics/setting-targets>.

Detailed guidance on using data to help develop and monitor gender equity performance.

Why (and How!) to Ask Survey Questions on Sexual Orientation and Gender Identity – Laura Wronski – SurveyMonkey

<https://www.surveymonkey.com/curiosity/ask-survey-questions-sexual-orientation-gender-identity/>.

Specific guidance for writing survey questions.

Women's Leadership Edge

<http://www.womensleadershipedge.org/>.

Wide array of tools to help organizations support, advance, and retain women, with parallels in engineering and law.

Notes

1. Edward Hubbard, *The Diversity Scorecard: Evaluating the Impact of Diversity on Organizational Performance* (San Francisco: Elsevier, 2004).
2. Marc Brenman, "Diversity Metrics, Measurement, and Evaluation," *Workforce Diversity Network*, last modified November 24, 2012, https://workforcediversitynetwork.com/res_articles_DiversityMetricsMeasurementEvaluation.aspx.
3. Intercultural Leadership Program first developed by AIA Minnesota in 2019.
4. Ryan Fuller, "The Paradox of Workplace Productivity," *Harvard Business Review*, April 19, 2016, <https://hbr.org/2016/04/the-paradox-of-workplace-productivity>.
5. Lisa Kirby, "Legal Department (aka Clients) Efforts Designed to Drive Outside Counsel Diversity," Diversity Lab, last modified August 8, 2017, <https://www.diversitylab.com/knowledge-sharing/clients-push-for-diversity/>.
6. Simon Black, "Qualities of Effective Leadership in Higher Education," *Open Journal of Leadership*, 2015.
7. The Episcopal Church, *Seeing the Face of God in Each Other: The Antiracism Training Manual of the Episcopal Church, Diversity, Social, and Environmental Ministries Team Mission Department of the Episcopal Church*, 2011, https://episcopalchurch.org/files/antiracism_book-revise3.pdf; Bentley University Center for Women and Business, *Assessing Diversity Metrics and Women's Advancement*, 2017, <https://www.bentley.edu/centers/center-for-women-and-business/diversity-metrics-research-report-request#DownloadReport>; Mary L. Martínéz, "Demystifying D&I Metrics" (presentation, SHRM Diversity & Inclusion Conference & Exposition, San Francisco, CA, 2013), <https://slideplayer.com/slide/6191267>; Project Implicit, accessed October 26, 2019, <https://implicit.harvard.edu/implicit/>; and Mitchell Hammer, *Intercultural Development Inventory*, 2019, <https://idiinventory.com>.
8. Camille Patrick and Dipak Sundaram, "The Real Value of Getting an Exit Interview Right," *Gallup*, June 14, 2018, <https://www.gallup.com/workplace/236051/real-value-getting-exit-interview-right.aspx>.
9. Dennis Cass, "The Difference that Makes a Difference," Minnesota Council of Foundations, accessed August 23, 2019, <https://mcf.org/difference-makes-difference>.
10. Some examples of questions to explore:
 - Do employees feel valued by the firm, its leaders, and their managers?
 - Do they believe they are able to fully contribute their unique perspectives and skills?
 - Do they feel their differences are welcomed and respected?
 - Do they believe they have equal opportunities for advancement?
 - Do they feel heard?
 - Who is leaving, and why?

From Lauren Leader-Chivée, "The Right Way to Measure Executive Diversity," *Harvard Business Review*, April 30, 2014, <https://hbr.org/2014/04/the-right-way-to-measure-executive-diversity>.

Also:

 - How do your employees currently perceive their careers? Are there differences in perceptions on the basis of personal identity, seniority, etc.?
 - How long do employees typically stay with your firm? Are there differences in tenure based on personal identity? What are the most common reasons that individuals leave the firm, and do these vary on the basis of personal identity?

No one metric can possibly capture the spectrum of information to be gathered about the state of EDI. One simple indicator that could be used as part of a selected array of metrics is the Net Promoter Score (NPS®), generally used to evaluate customer experiences but applicable to employees as well: "On a scale of 0 to 10, how likely is it that you would recommend (this firm) as a place to work?" The NPS can be taken as part of a larger survey annually or measured on its own quarterly or even monthly as one, but not the only, indicator of progress. "Net Promoter Score (NPS®) Calculation," Survey Monkey, accessed July 19, 2019, <https://www.surveymonkey.com/mp/net-promoter-score-calculation/>.
11. Patrick and Sundaram, "The Real Value of Getting an Exit Interview Right."

12. Bentley University Center for Women and Business, *Assessing Diversity Metrics*.

13. Three useful sources for detailed guidance on using data to help develop and monitor an EDI program include: “Measuring Progress” by Project Include, “Setting Targets” by Workplace Gender Equality Agency (WGEA), and “Inclusive Economy Metric Set” by B Impact Assessment. Additional guidance appears in the Resources section of this guide.

14. “Creating a Strategic Diversity Management Plan,” SHRM, May 22, 2012 [subscription required], https://www.shrm.org/resourcesandtools/hr-topics/behavioral-competencies/global-and-cultural-effectiveness/pages/strategicdiversitymanagementplan.aspx?_ga=2.131499655.924427241.1560207488-1139388716.1557859890.

15. “Setting Targets,” WGEA, accessed July 17, 2019, <https://www.wgea.gov.au/topics/setting-targets>; and SHRM, “Creating a Strategic Diversity Management Plan.”

16. For more information on the DOJ/FTC guidelines, see <https://www.justice.gov/atr/page/file/1197731/download>, at Statement 6.

FIRST EDITION
Part III - Released December, 2019
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American Institute of Architects (AIA)

The Guides for Equitable Practice are authored by a research team based at the University of Washington, under the direction of Renée Cheng. The guides are written by Laura Osburn, Nancy Alexander, and Renée Cheng, with Cozy Hannula. The guides are designed by Vadim Gershman and published with the support of the American Institute of Architects Equity and Future of Architecture Committee.

The views expressed are the views of the authors, not necessarily those of the AIA.

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