



# DEIB Metrics: An Essential Guide

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# About RedThread

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Sure, we're experts in performance, people analytics, learning, and D&I—and we're well-versed in the technologies that support them. But we're also truth-seekers and storytellers in an industry often short on substance and too full of @\$%\$. Our mission (indeed, our very reason for existing) is to cut through the noise and amplify what's good. We look for the connections (or red threads) between people, data, and ideas—even among seemingly unrelated concepts. The result is high quality, unbiased, transformative foresight that helps you build a stronger business.

To learn more, reach out to us at [hello@redthreadresearch.com](mailto:hello@redthreadresearch.com) or visit [www.redthreadresearch.com](http://www.redthreadresearch.com).

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# Introduction

At this point, the business case for diversity, equity, inclusion, and belonging (DEIB) is clear. Our own research (see Figure 1) shows the relationship between having a strong DEIB culture, and critical individual and performance outcomes.<sup>1</sup>

Yet, for years, the representation of diverse populations in organizations improved almost imperceptibly.

Then we had a global pandemic and the rise of a social justice movement, sparked by the murder of George Floyd. Along with that came the heightened awareness that the pandemic was impacting diverse populations much more—particularly for women and people of color who were dropping out of the workforce at higher rates than other populations. As a result of this confluence of events, organizations began making big promises on DEIB in the summer of 2020.

When this happened, one of our first questions was how organizations would show that they'd made good—or at least made progress—on those commitments. While DEIB metrics—measurements designed to understand DEIB—are the obvious answer, how to select, collect, use, and maintain those metrics is not so clear.

Thus, this research initiative on DEIB metrics and analytics was born. The first article in this series, “[DEIB Analytics: A Guide to Why & How to Get Started](#),” provides leaders with a plan on how to begin using DEIB metrics and analytics. We've shared an 8-step guide with details on the actions and considerations that organizations need to take to effectively implement DEIB metrics.

Figure 1: The impact of a strong DEIB culture on individual & organizational outcomes



Source: RedThread Research, 2022.

# This article: An essential guide to DEIB metrics

This report focuses more narrowly on the appropriate metrics and analytics for DEIB. We aim to provide DEIB leaders, people analytics practitioners, HR business partners, workforce planning, and talent management leaders with:

1. A foundational understanding of the different metrics that can be used to measure and track their DEIB performance
2. Insights on how those different metrics might vary, depending on their org's sophistication with DEIB and analytics

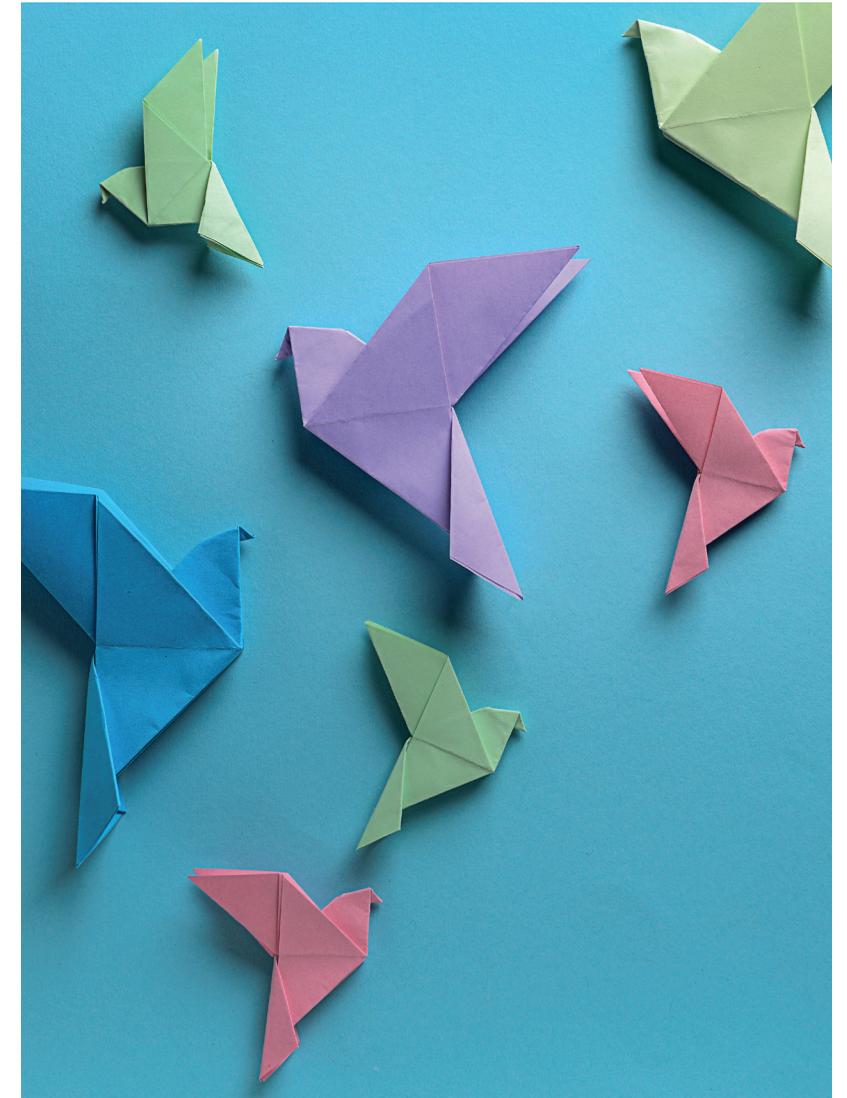
This article is based on a wide range of information, including our research on:

- People analytics technology<sup>2</sup>
- DEIB analytics<sup>3</sup>
- DEIB strategies<sup>4</sup>
- DEIB technology<sup>5</sup>
- A literature review of DEIB and analytics<sup>6</sup>
- Interviews with ~20 people analytics and DEIB practitioners

Our research focuses specifically on the people within an organization's existing workforce. We know a number of other DEIB metrics exist that orgs should also consider, such as those which apply to their supply chain, community efforts, ESG (environmental, social, and governmental) requirements, etc. While critical, those areas are outside the scope of this report.

We would also like to mention that this report is the first of its kind, in that it attempts to provide a holistic look at all talent-related DEIB metrics. Any first try will miss some critical elements and we acknowledge this report may be incomplete. We invite you to share any suggestions, feedback, or additions you think appropriate by emailing us at [hello@redthreadresearch.com](mailto:hello@redthreadresearch.com).

The DEIB space is evolving quickly, and we will only make progress by putting out our best ideas and amending them quickly as new information becomes available. Thank you for being part of that process and pushing forward toward greater opportunities for all.



# Key findings

Below are a few key findings we identified through this study:

1. **Orgs find it difficult to use DEIB metrics due to challenges around data identification, interoperability, and security.** Many orgs struggle to identify the metrics most useful for them, or align them to their overall goals.
2. **DEIB metrics should be used collectively to utilize their full value.** Diversity metrics can provide a more holistic picture of the state of DEIB when combined with inclusion, equity, and/or belonging metrics.
3. **Orgs can approach their DEIB metrics journey in 3 steps:**
  - **Begin by answering the “what.”** Orgs should use DEIB metrics to understand where they currently stand and how are they perceived by their employees. They should know what issues currently exist.
  - **Understand the “why.”** Orgs should use DEIB metrics to find out why those issues exist and the reasons they are falling short in those areas.
  - **Identify “how” they can fix the issues.** Orgs should plan targeted initiatives and interventions in order to get the maximum value and results from their efforts.



# Defining DEIB

Let's start our essential guide by defining our terms (see Figure 2).

Figure 2: Definitions of diversity, equity, inclusion & belonging (DEIB)



## Diversity

The variation in peoples' inherent and self-evident characteristics.

- | Inherent   | Self-evident  |
|--|---|
| <ul style="list-style-type: none"> <li>• Attitudes</li> <li>• Values</li> <li>• Beliefs</li> <li>• Experiences</li> <li>• Behaviors</li> <li>• Lifestyle</li> <li>• Sexual orientation</li> <li>• Education</li> <li>• Religion</li> <li>• Socio-economic situation</li> <li>• Marital status</li> <li>• Social roles</li> <li>• Personality traits</li> <li>• Ways of thinking</li> <li>• Mental abilities &amp; characteristics</li> </ul> | <ul style="list-style-type: none"> <li>• Gender</li> <li>• Race</li> <li>• Ethnicity</li> <li>• Nationality</li> <li>• Language</li> <li>• Age</li> <li>• Physical abilities &amp; characteristics</li> </ul> |



## Equity

The fair and respectful treatment of all people.

- Different from equality, this includes providing everyone with equitable:
- Access
  - Opportunity
  - Remuneration
  - Benefits
- This also includes factors that can result in uneven distribution of resources.



## Inclusion

The feeling of being involved and welcomed experienced by all.

- This includes acts and practices that make a person feel:
- Integrated into the informal networks of an organization
  - Respected for their unique contributions
  - Accepted for who they are



## Belonging

The sense of security and support experienced by all.

- This results from a belief in being:
- Accepted
  - Valued
  - Able to be their "authentic self"

Source: RedThread Research, 2022.

# Why are DEIB metrics & analytics important?

Some of the common reasons why leaders start to focus on DEIB metrics and analytics include:

- Creating a clear business case for DEIB
- Measuring the return on investment (ROI) of DEIB expenditures
- Tracking the impact of critical DEIB initiatives

In addition to these, a few more reasons why orgs should use DEIB metrics and analytics include:

- Busting myths or addressing anecdotes that may or may not be true
- Checking assumptions about DEIB
- Meeting consumer, investor, and employee expectations when it comes to progress on DEIB

While these are all good reasons to use DEIB data, one of the most compelling motivations for why DEIB is critical was articulated by one of our interviewees:

“Companies have been setting diversity goals for decades but have struggled with “goal-getting”—meaning the clear accomplishment of those goals—because of a lack of feedback and data to help them get after those goals every day. Without any feedback on progress, companies lose sight of the goals.”

—Phil Willburn, Head of People Analytics & Insights, Workday<sup>7</sup>





“In every organization, there is a need for a set of standardized metrics that can be applied across the business, and customized metrics that are specific to each business, to ensure equitable measurement.”

—Crysta Dungee, DEI leader

# Why do orgs find DEIB data difficult to use?

Many leaders struggle to use DEIB data for reasons such as the following (see Figure 3):

- **Challenges in identifying and using appropriate metrics.** Historically, very few orgs have attempted to track metrics for DEIB and even fewer have ventured beyond collecting diversity data. Often, leaders are unsure which metrics can and should be measured for DEIB. Even if they're able to identify them, leaders then often face challenges around tracking and integrating the data.
- **Legal, security, and privacy issues.** DEIB data involves sensitive information—and this comes with legal and security challenges around data collection, storage, and usage. As a result, some orgs hesitate to collect and use it. Additionally, employees may be hesitant to provide it, due to data privacy and access concerns.
- **Poor alignment with goals.** Orgs find it challenging to use the data if there's no or poor alignment between the data collected and the overall DEIB goals that the company wants to achieve. As result, there can be a sense of helplessness, which can render the data not as helpful.
- **Data responsibility issues.** Because DEIB data can reside in multiple systems under several functions (e.g., HR, D&I, IT, sales), there can be a lack of clarity around who is primarily responsible for the data and how / when it can be shared.

- **Data interoperability issues.** Related to the previous point, orgs often find it challenging to use data collected in one system on another due to integration issues and capabilities of the tech solutions in place.

For this article, we focus on the first bullet to help orgs identify the range of metrics they can use.

“Many companies ignore D&I data because of its sensitivity and because it can be time consuming, yet it is the most important thing that can tell them the truth about their progress.”

—Head of people analytics, a large technology company

Figure 3: Challenges to using DEIB data by orgs



Source: RedThread Research, 2022.

“When you have members of a minority group who are leaving at a higher rate, that’s telling you something is wrong, and it helps steer you to where the problems are. It needs to be measured at quite a low level in the company because that’s the way you find where your hot spots are.”

—Fiona Vines, Head of Inclusion and Diversity and Workforce Transition, BHP<sup>8</sup>

# Clarifying diversity metrics

*Diversity metrics: Measurements, based on employee data, to understand the inherent and self-evident characteristics of the current and future workforce of an organization.*

As we highlight in our report “[DEIB Analytics: Getting Started](#),” the essential first step to creating diversity metrics is collecting appropriate demographic data. Essentially, the data collected should allow orgs to answer 3 questions:

1. What does our current workforce look like across different levels (hierarchy) and functions / business units?
2. Who are we hiring (internally and externally) across different levels?
3. Who is leaving the org and at which level(s)?

It’s important that leaders not only look at simplistic diversity numbers, such as gender or race / ethnicity—they also need to consider multilevel diversity, known as intersectionality, such as Black women or gay Asian men. This additional analysis helps leaders understand their workforce at a more nuanced level, and make better recommendations and changes.

Many orgs track basic diversity numbers: 96% of U.S. companies report the gender representation of their employees at all levels and 90% report gender representation at senior levels.<sup>9</sup>

However, far fewer orgs look at intersectionality: Only 54% of companies track gender and race / ethnicity—such as Black or Latina women in senior leadership.<sup>10</sup>

Figure 4 is a list of common demographic data that we’ve seen orgs collect (for a more comprehensive list of data that could be collected, please see our definition on page 7). It’s important to note the significant legal limitations in different countries as to which of the following can be collected and stored. Your org’s legal counsel should always be involved in determining which data to collect.

While comparatively easy to collect and analyze, orgs should be wary of trying to do everything at once when it comes to diversity metrics. Leaders should first figure out the immediate challenges or business issues they want to solve for and identify the appropriate metrics accordingly.

Figure 4: Commonly collected diversity demographic data

- ✓ Gender\*
- ✓ Age\*
- ✓ Racial and ethnic identities\*\*
- ✓ Nationality
- ✓ Education
- ✓ Country of residence
- ✓ Disability status and physical accessibility needs
- ✓ Caregiver status
- ✓ Learning and mental accessibility needs
- ✓ Sexual orientation\*\*\*
- ✓ Religious affiliation\*\*\*

Source: RedThread Research, 2022.

\*Collected in most geographies.

\*\*Collected in the U.S. and some other select regions, and may be illegal in other geographies

\*\*\*May be illegal to collect in some geographies

“Selecting which diversity metrics to track should depend on the systemic issues the organization is facing - is it about bringing people in? or developing people? or keeping people in? What do they need to get to their goals?”

—Lexy Martin, researcher and analyst, Visier

# Examples of diversity metrics

Figure 5 offers a list of metrics that many orgs can use to measure diversity. Many orgs already collect most of these metrics through their human resource information system

(HRIS) or applicant tracking systems (ATS). By adding a demographic lens to these metrics, orgs can quickly understand the state of diversity within the org.

Figure 5: Metrics to measure diversity\*

	CURRENT WORKFORCE	FUTURE WORKFORCE
<b>Representation</b> <i>(headcount, pipeline, turnover)</i>	<ul style="list-style-type: none"> <li>• Total workforce</li> <li>• Tech vs non tech roles</li> <li>• Employees vs contingent or contractor workforce</li> <li>• Tenure</li> <li>• New hire turnover</li> <li>• Senior leadership</li> <li>• Specific business units / functions</li> <li>• Hiring panel involved in candidate assessments</li> <li>• Intent to turnover</li> <li>• Voluntary turnover rate</li> <li>• Involuntary turnover rate</li> <li>• Turnover rate of high-potential talent</li> </ul>	<ul style="list-style-type: none"> <li>• Applicants per opening</li> <li>• Overall applicant pool</li> <li>• Candidates interviewed</li> <li>• Candidates hired</li> <li>• Leadership candidates hired</li> <li>• All candidates hired</li> <li>• Candidate source</li> </ul>

\*All items should be measured by number and demographic distribution, unless otherwise stated.

Source: RedThread Research, 2022.

# Real-World Threads

Using diversity data to improve hiring<sup>11</sup>

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As part of its diversity goals, an industrial manufacturer wants to achieve 50% female parity in leadership roles by 2030, and create a globally diverse workforce with inclusive leaders and teams. In order to do so, the company needed an accurate picture of their current workforce diversity mix and the recruiting pipeline.

Working with a technology provider, the company looked at its recruiting pipeline to better understand how women and minorities move through the full process from recruiter review to meetings with the hiring manager. A review of the talent acquisition process revealed that the number of women applicants was disproportionately lower than their male counterparts. Additionally, as women moved through the hiring process, they were more likely to be dropped during the interview process.

To tackle these challenges, the company implemented:

- Programs for hiring managers, including unconscious bias training
- Workshops on inclusive conversations to enable a better hiring experience for women and minority candidates moving through the process

As a result of these actions, the company is in a better position to meet its 2030 goals. It's also working to attract more women and minority job applicants through strategic partnerships with the Society of Women Engineers and the National Society of Black Engineers, among others.



# Understanding equity metrics

*Equity metrics: Measurements—based on employee perception data collected directly from employees, and objective data based on employee actions—to understand differences in remuneration, benefits, opportunities, and access for different groups within an organization.*

Equity metrics can help orgs understand the effectiveness of their processes, and identify unfair or biased systems, practices, and policies. Research conducted in 2021 revealed that when employees are treated fairly, they're:<sup>12</sup>

- 9.8 times more likely to look forward to going to work
- 6.3 times more likely to have pride in their work
- 5.4 times more likely to want to stay a long time at their company

Equity metrics can be measured from data collected via several sources, such as:

- Learning and development data
- Performance management data
- Payroll
- Employee engagement / experience data

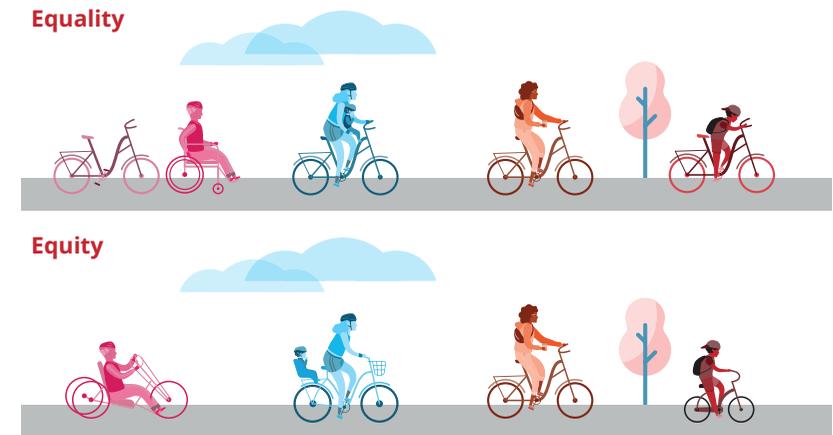
Ensuring fairness in the distribution of resources, opportunities, and access can help leaders address existing systemic inequities within the orgs. The point to note here is that the distribution needs to be fair, not equal. The difference between these two concepts is shown in Figure 6.

Thus, the goals of measuring and tracking these metrics should not be to ensure equality or sameness for everyone, but rather to:

1. Detect areas in which systemic inequities exist
2. Identify differences in capabilities, resources, and needs
3. Implement systems and process that take these into account

While orgs have a strong case for creating a fair and equitable environment, many struggle to do so. For example, our 2021 study on **performance management trends** revealed that only 48% of employees believe their performance evaluation process is fair and consistent.<sup>13</sup> As orgs continue to manage unique needs and challenges for different employees, leaders will increasingly need to address issues around managing fairness and equity across varied employee experiences.

Figure 6: Visualizing equity



Source: Robert Wood Johnson Foundation, 2017<sup>14</sup>

# Examples of equity metrics

Below is a list of metrics that orgs can use to understand, measure, and track equity. All metrics should be analyzed by the different demographics collected by the org to understand the differences in opportunities, access, and renumeration for various groups.

Figure 7: Metrics to measure equity\*

DATA TYPE	OPPORTUNITIES	ACCESS	RENUMERATION & BENEFITS
<b>Performance management</b>	<ul style="list-style-type: none"> <li>Promotion rates</li> <li>Time until promotions</li> <li>Stretch assignments / projects assigned</li> <li>Succession plan</li> <li>Control of resources (people or budget)</li> <li>Profit and Loss (P&amp;L) responsibility</li> </ul>	<ul style="list-style-type: none"> <li>Frequency of manager check-ins or 1:1s</li> <li>Comments with constructive feedback</li> </ul>	<ul style="list-style-type: none"> <li>Percent increase in compensation because of performance assessment</li> </ul>
<b>Learning and development (L&amp;D)</b>	<ul style="list-style-type: none"> <li>Training expenses per employee</li> <li>Mentor or sponsorship program</li> <li>Career conversations</li> <li>Leadership programs offered</li> </ul>	<ul style="list-style-type: none"> <li>Rate of trainings / courses accessed</li> <li>Time spent accessing trainings / courses</li> <li>Range of trainings / courses accessed</li> <li>Trainings that accommodate for disabilities</li> <li>Leadership programs accessed</li> </ul>	<ul style="list-style-type: none"> <li>Percent change in compensation because of L&amp;D opportunity or certification</li> </ul>
<b>Total rewards</b>	<ul style="list-style-type: none"> <li>Change in compensation for successfully completing new opportunities</li> <li>Maternity leave</li> <li>Paternity leave</li> </ul>	<ul style="list-style-type: none"> <li>Extent to which there's transparency about pay bands</li> </ul>	<ul style="list-style-type: none"> <li>Compensation ratio</li> <li>Market ratio</li> <li>Salary hike since last year</li> </ul>
<b>Employee engagement / experience</b>	<ul style="list-style-type: none"> <li>Positive or negative employee comments on equity</li> </ul>	<ul style="list-style-type: none"> <li>Burnout rate</li> <li>Positive or negative employee comments on equity</li> <li>Technologies that accommodate for disabilities</li> <li>Physical accommodations in workplace and / or work-form-home setting</li> </ul>	<ul style="list-style-type: none"> <li>Wellbeing programs</li> <li>Flexible work programs</li> </ul>

\*All items should be measured by number and demographic distribution, unless otherwise stated

Source: RedThread Research, 2022.

# Real-World Threads

Using people analytics to create a more equitable environment

- **Uber.**<sup>15</sup> Shortly after the start of the COVID-19 pandemic, Uber's People Analytics team found that employees with children younger than 5 years of age scored lower than the company average on engagement and satisfaction metrics. To help provide them with the support they needed, the company added some flexibility options to help those employees balance childcare with work.
- **A midsize U.S. law firm.**<sup>16</sup> Upon auditing its performance evaluations, the company found that only 9.5% of people of color at the firm received mentions of leadership in their performance evaluations—more than 70 percentage points lower than white women. The company changed the evaluation form that broke down job categories into competencies and asked that ratings be supported by at least 3 pieces of evidence. They also developed a 1-hour workshop to teach everyone how to use the new form.

As a result of these changes:

- Comments with constructive feedback for people of color increased from 17% the year before to 49%
- Women also received greater constructive feedback (from 10.5% the previous year to 29.5%)



“Let’s say that the engagement score for our company is high at 80%, and that makes us happy. And then you realize that 80% of your employees are White—which means that you’re not really hearing the voice of those under-represented groups. Inclusion analytics is about pulling that out, and making sure you have a good sense of where everybody’s falling on all of your core metrics.”

—Hallie Bregman, PhD, Global Talent Strategy and Analytics Leader<sup>17</sup>

# Identifying inclusion metrics

*Inclusion metrics: Measurements—based on employee perception and objective data—to understand the current state of integration, acceptance, and respect experienced by employees in an organization.*

After diversity, inclusion is the most common area that organizations tend to measure. According to a 2018 study, a little more than 50% of orgs measured inclusion.<sup>18</sup> While the focus and urgency around this area has increased over the years, few orgs are doing anything beyond tick-the-box exercises.<sup>19</sup>

There are a few reasons why orgs should focus on understanding and measuring inclusion. Orgs with an inclusive culture:<sup>20</sup>

- Are twice as likely to indicate they met business goals from last 3 years
- Are 81% more likely to indicate high customer satisfaction
- Have employees that are 45% more likely to stay
- Have employees that are 2 times more likely to give a positive Net Promoter Score® (NPS)

If these reasons weren't enough, the volatility of 2020 and 2021 has resulted in many companies facing tough questions around their efforts in this area. According to a recent analysis of S&P 500 earnings calls, the frequency with which CEOs talk about issues of equity, fairness, and inclusion on these calls has increased by 658% since 2018.<sup>21</sup>

Inclusion metrics can help orgs understand whether employees feel:

- Accepted by others in the workplace
- Integrated into and a part of the wider organization
- Respected for their work by others

As alluded to above, orgs can typically approach inclusion metrics in 2 ways—employee perception data and objective data. We explain the differences between them in Figure 8.

Figure 8: Employee perception & objective data for inclusion



## Employee perception data

**What:** Data collected directly from employees

**Why:** To understand how employees feel about inclusion at workplace

**How:**

- Analyze scores from employee engagement / pulse surveys
- Use employee feedback and comments from internal and external sources
- Leverage an "Inclusion index": a set of 5-6 questions specially around inclusion, included as part of engagement surveys



## Objective data

**What:** Data collected on employees based on their actions and behaviors

**Why:** Can help orgs identify areas where inclusive behaviors are practiced as well as areas where gaps exist

**How:**

- Analyze existing employee data
- Use metadata from emails, calendars, etc.
- Analyze workplace communication data from tools
- Leverage objective data from performance management and learning systems

Source: RedThread Research, 2022.

# Examples of inclusion metrics

Figure 9 offers a list of metrics that orgs can use to understand, measure, and track inclusion. These include metrics that directly impact an employee's sense of inclusion (e.g., mentor

relationships and strength of connections with others), as well as some not-so-obvious metrics that can drive inclusion (such

as the average distance between office and home, which can adversely affect employee experience).

Figure 9: Metrics to measure inclusion\*

DATA TYPE	INTEGRATION	ACCEPTANCE	RESPECT
<b>Representation (headcount, pipeline)</b>	<ul style="list-style-type: none"> <li>Absenteeism</li> <li>First-year resignation rate</li> <li>First-year turnover rate</li> </ul>	<ul style="list-style-type: none"> <li>Offer acceptance rate</li> <li>Application completion rate</li> </ul>	<ul style="list-style-type: none"> <li>Hiring manager satisfaction</li> <li>Candidate job satisfaction</li> </ul>
<b>Performance management</b>	<ul style="list-style-type: none"> <li>Internal mobility</li> <li>Frequency of check-ins and 1:1s</li> <li>Revenue</li> </ul>	<ul style="list-style-type: none"> <li>Mentorship relationships</li> </ul>	<ul style="list-style-type: none"> <li>Opportunities to give and receive feedback</li> </ul>
<b>Employee engagement / experience</b>	<ul style="list-style-type: none"> <li>Positive or negative employee comments on inclusion</li> <li>Gigs or talent marketplace</li> </ul>	<ul style="list-style-type: none"> <li>Average distance from home</li> <li>Engagement rate / score</li> <li>NPS</li> <li>Positive or negative employee comments on inclusion</li> </ul>	<ul style="list-style-type: none"> <li>Inclusion index</li> <li>Positive or negative employee comments on inclusion</li> <li>Customer feedback</li> </ul>
<b>Participation</b>	<ul style="list-style-type: none"> <li>Decision-making meetings invited to</li> </ul>	<ul style="list-style-type: none"> <li>Employee resource groups offered</li> </ul>	<ul style="list-style-type: none"> <li>Participation in resource groups</li> <li>DEIB events offered by org</li> </ul>
<b>Network</b>	<ul style="list-style-type: none"> <li>Levels of centrality in communication and collaboration networks</li> </ul>	<ul style="list-style-type: none"> <li>Levels of connectivity communication and collaboration in networks</li> </ul>	<ul style="list-style-type: none"> <li>Diversity of employee networks</li> </ul>
<b>Communication</b>	<ul style="list-style-type: none"> <li>Formal and informal interactions with senior leadership</li> </ul>	<ul style="list-style-type: none"> <li>Adoption or use of pronouns</li> </ul>	<ul style="list-style-type: none"> <li>Email response time</li> <li>Digital behaviors (e.g., tone used in emails, appreciating someone's work, etc.)</li> </ul>

\*All items should be measured by number and demographic distribution, unless otherwise stated.

Source: RedThread Research, 2022.

# Real-World Threads

## Understanding and embedding inclusion within everyday behaviors

When it comes to inclusion analytics, an international electronics company believes in embedding inclusion in everyday behaviors, activities, and processes across the company. It's been collecting data and doing the research for more than 5 years to understand the key behaviors that impact inclusion at the organization. Because of its groundwork, the company was able to identify 4 metric areas that they needed to track and analyze on a regular basis:

1. Net Promoter Score
2. Job fit
3. Employee engagement score
4. Intention to turnover

The people analytics team approaches these metrics in 2 ways, by:

- Checking in with new hires and collecting the data from them
- Making sure that all employee surveys administered by the org contain questions that tie into these metrics

By collecting this information regularly, the company has been able to identify pain points and concerns experienced by diverse populations, especially in the current times—and plan initiatives and appropriate decisions around topics, such as vaccinations, return to offices, rollouts of wellbeing programs, and measurement of the financial impact of those programs.

Specifically, the company has extended its remote working policy because they determined that return to office will disproportionately

impact their female workforce and potentially increase their turnover by 33%. It also rolled out a \$300 COVID Wellbeing credit that can be used towards children's tutoring costs, wellbeing app subscriptions, tax preparation costs, etc. to help employees—especially parents and caregivers who are more impacted by the pandemic. Additionally, the company re-examined and adjusted its communication and approach on vaccine education as a result of employee feedback.

In addition to these measures, the people analytics team has also been able to use insights from inclusion analytics to identify areas in which different groups need support. For example, the company found that its millennial workforce needed and wanted greater support for financial planning as part of its benefits program. The company added specific financial wellbeing offering in its annual benefits open enrollment to support Millennials and Gen Z. In another example, the company was able to build more inclusive policies around statutory and floating holidays that take into account the fact that employees with different religious backgrounds might want to take different holidays.

As a result of these efforts:

- Net Promoter Score of the company increased by 7%
- Confidence in leadership increased by 8%
- Employee engagement increased by 5%





“When someone is experiencing a sense of belonging, they feel freer, they feel more creative and their opportunity to potentially have an impact at work is significantly increased.”

—Kate Shaw, Director of Learning, Airbnb<sup>22</sup>

# Defining belonging metrics

*Belonging metrics: Measurements, based on employee perception and objective data, to understand if employees feel valued and supported within an organization.*

While closely related to inclusion conceptually, it's important that orgs pay equal attention to measuring and understanding belonging. We explain how belonging is different from inclusion in Figure 10. A high sense of belonging among employees can result in:

- An increase in employee happiness and employee engagement, which in turn impacts employee retention<sup>23</sup>
- A significant increase in job performance<sup>24</sup>
- A reduced turnover risk and a decrease in employee sick days<sup>25</sup>

Analytics based on belonging metrics can serve as a leading indicator of critical diversity outcomes as well. Specifically, belonging metrics can help orgs to:

- Gain a deeper understanding of the sense of security experienced by employees
- Find out if employees feel connected with the org's values and purpose
- Bolster their ongoing efforts around inclusion and equity

Figure 10: Belonging versus inclusion

Similar to inclusion, a sense of belonging is driven by a feeling of being accepted and respected among others. In addition, however, belonging is also impacted by additional factors that determine whether:

- ✓ An individual's values and purpose align with those of their org
- ✓ They can build strong bonds with those around them
- ✓ They feel valued for their contributions and efforts

Source: RedThread Research, 2022.



# Examples of belonging metrics

Figure 11 offers a list of metrics that orgs can use to understand, measure, and track belonging. While some metrics speak to belonging directly (e.g., a belonging index as part of an engagement survey), others should be used in combination with

one or more additional metrics to gain a better understanding. For example, by looking at metrics around the number of resources groups offered and the participation rates for them,

orgs can try to understand if employees feel supported. Employee feedback comments specific to these topics can provide even more context of the underlying issues.

Figure 11: Metrics to measure belonging\*

DATA TYPE	VALUED	SUPPORTED
<b>Recognition</b>	<ul style="list-style-type: none"> <li>Formal recognition programs</li> <li>Recognition responsibilities</li> </ul>	<ul style="list-style-type: none"> <li>Informal recognition programs</li> <li>Recognition opportunities</li> </ul>
<b>Benefits / total rewards</b>	<ul style="list-style-type: none"> <li>Flexible work programs offered</li> </ul>	<ul style="list-style-type: none"> <li>Wellbeing programs and resources</li> </ul>
<b>Employee engagement / experience</b>	<ul style="list-style-type: none"> <li>Positive or negative employee comments on belonging</li> </ul>	<ul style="list-style-type: none"> <li>Belonging index</li> <li>Positive or negative employee comments on belonging</li> </ul>
<b>Learning and development</b>	<ul style="list-style-type: none"> <li>Resources and training offered that focus on belonging</li> </ul>	<ul style="list-style-type: none"> <li>Leadership participation in DEIB training</li> <li>Employee participation in DEIB training</li> <li>Resource groups</li> <li>Organizational participation in resource groups</li> <li>DEIB events offered by the organization</li> </ul>
<b>Network</b>	<ul style="list-style-type: none"> <li>Levels of centrality in networks</li> </ul>	<ul style="list-style-type: none"> <li>Levels of connectivity in networks</li> </ul>
<b>Communication</b>	<ul style="list-style-type: none"> <li>Formal and informal interactions with senior leaders</li> </ul>	<ul style="list-style-type: none"> <li>Adoption or use of pronouns</li> </ul>
<b>Performance management</b>	<ul style="list-style-type: none"> <li>Stretch assignments / projects assigned</li> </ul>	<ul style="list-style-type: none"> <li>Coaching or mentoring conversations</li> </ul>

\*All items should be measured by number and demographic distribution, unless otherwise stated.

Source: RedThread Research, 2022.

# Real-World Threads

Using nontraditional metrics to understand belonging<sup>26</sup>

A number of companies look beyond the obvious metrics and data to gain a deeper understanding of the current state of DEIB within their orgs. For example:

- Cindy Owyong, the Vice President of Inclusion, Culture, and Change at Charles Schwab, looks at the metrics around growth and vitality of the company's employee resource groups (ERGs). By tracking metrics such as the number of ERGs and the number of participants in them, the company is able to really understand the work Schwab's ERGs are doing and whether they are providing value to their members.

In addition, these metrics can also be indicative of whether employees have the support they need to be able to participate in the ERGs and do the work that needs to be done.

- Zoom Video Communications is another company that lays emphasis on such metrics. According to Damien Hooper-Campbell, the company's Chief Diversity Officer, these nontraditional metrics "serve as bellwethers." The company looks at metrics around the ERGs and keeps a track of the number of allies who are active in ERGs.

According to Hooper-Campbell, "If you have a women's employee resource group, do you have any men who are part of it? How many non-Latinx folks are part of your Latinx employee resource group and are contributing to it, or coming and listening to it?"

Such metrics can offer a more nuanced understanding of the extent of support experienced by different groups across the org.



# DEIB metrics: Strengths & limitations

DEIB metrics are most effective when multiple types of metrics are combined to gain a clearer picture of DEIB holistically. (See Figure 12.) For example, by combining inclusion metrics with

equity metrics, orgs can understand not only that different groups may be feeling less included, but also the specific

reasons (e.g., unequal development opportunities or biased performance reviews) for it.

Figure 12: Strengths & limitations of DEIB metrics

METRICS TYPE	STRENGTHS: USEFUL FOR	LIMITATIONS: DON'T EXPLAIN
<b>Diversity metrics</b>	<ul style="list-style-type: none"> <li>Identifying groups that are underrepresented in the org at different levels</li> <li>Identifying barriers to entry for underrepresented groups or biased recruitment efforts</li> <li>Understanding whether underrepresented groups are leaving the org at a different rate than other groups voluntarily or involuntarily</li> </ul>	<ul style="list-style-type: none"> <li>Why some groups might be underrepresented in the org</li> <li>Why some groups might be leaving the org voluntarily</li> <li>The different kinds of biases that might be impacting the hiring of underrepresented groups</li> <li>How to achieve desired results and as such are lagging indicators</li> </ul>
<b>Equity metrics</b>	<ul style="list-style-type: none"> <li>Identifying bias in the way performance is assessed and promotions are determined</li> <li>Identifying areas of inequity in compensation</li> <li>Understanding if differing amounts of training expenses are spent on underrepresented groups</li> <li>Identifying if underrepresented groups are experiencing different workloads</li> </ul>	<ul style="list-style-type: none"> <li>If underrepresented groups are self-selecting out of promotion opportunities due to other underlying causes</li> <li>Why underrepresented groups are compensated differently</li> <li>The additional challenges faced by underrepresented groups, resulting in burnout or increased workloads</li> </ul>
<b>Inclusion metrics</b>	<ul style="list-style-type: none"> <li>Identifying whether underrepresented groups feel included within the org</li> <li>Understanding the different experiences by underrepresented groups across the org</li> <li>Highlighting how well knit or dispersed networks with underrepresented groups are</li> <li>Being leading indicators and improving diversity overall</li> </ul>	<ul style="list-style-type: none"> <li>The reasons why certain underrepresented groups are not integrated into networks</li> <li>The reasons why underrepresented groups don't have the same number of mentorship relationships</li> </ul>
<b>Belonging metrics</b>	<ul style="list-style-type: none"> <li>Identifying underrepresented groups that don't feel a sense of belonging</li> <li>Understanding biases that could be causing underrepresented groups to feel a low sense of belonging</li> <li>Identifying opportunities that could result in a greater sense of belonging among underrepresented groups</li> <li>Being leading indicators and improving diversity overall</li> </ul>	<ul style="list-style-type: none"> <li>The existing inequities within organizational processes</li> <li>The existing challenges faced by underrepresented groups sometimes and might be based on reactive data in some cases (i.e., exit interviews)</li> </ul>

Source: RedThread Research, 2022.

# Using data sources for DEIB

Now that we've covered the specific metrics, let's look at the data sources orgs can use for them. Orgs should keep a few things in mind when using such data:

1. **All data should be looked at with a demographic lens.** For example, the number of trainings accessed by the workforce would mean little unless analyzed to see if white women access training more often than Black women.
2. **Data are more powerful when combined with other data.** For example, data from the HRIS that shows exit rates should be combined with data from exit interviews, surveys, and employee comments on external review websites.
3. **Connectivity between data sources is essential to being able to use the data effectively.** Data interoperability, or the ability for different data between systems to work together, is a necessity in order for orgs to drive DEIB. As such, they should look for tech and tools that enable them to do that.
4. **The partnership between DEIB and people analytics functions is critical.** As we mention in our report "[DEIB Analytics: Getting Started](#)," DEIB and PA leaders often come from different backgrounds and parts of the org, which mean partnership challenges may exist that must be addressed. The insights and expertise of both groups are necessary to use and interpret DEIB metrics effectively.



# Examples of data sources for DEIB

Figure 13 shows that most of the data sources can be used for more than one DEIB area.

Figure 13: Data sources for DEIB metrics

	DIVERSITY	EQUITY	INCLUSION	BELONGING
HR Information System (HRIS) / Human Capital Management System (HCMS)	✓	✓	✓	✓
Application tracking system (ATS)	✓	✓	✓	✓
Employee engagement / experience surveys		✓	✓	✓
Communication tools (emails, calendars, meetings, etc.)		✓	✓	✓
Workplace tools (Zoom, Slack, Teams, SharePoint, etc.)			✓	✓
Learning systems (LMS, LXP, etc.)		✓		✓
Performance management systems		✓	✓	✓
Organizational network surveys			✓	✓
Employee feedback comments in surveys		✓	✓	✓
Employee comments on external review websites (e.g., Glassdoor)	✓	✓	✓	
Wellbeing tools		✓	✓	✓
Self-identification surveys	✓			
Retention / exit surveys		✓	✓	✓
Exit interviews		✓	✓	✓
Labor market data	✓	✓		

Source: RedThread Research, 2022.

# Beginning the DEIB metrics journey

Orgs at the beginning of their DEIB journey should try to answer the question: What's the current state of DEIB within the org? As such they should focus on 2 things:

1. Understanding the state of diversity
2. Identifying “low-hanging” challenges—areas that need attention and are easy to quickly start working on

When it comes to selecting metrics, orgs should start with:

- Getting their basic demographic data in order
- Measuring metrics around headcount, retention, and turnover to understand diversity
- Leveraging employee perception data—such as engagement surveys, feedback, and focus groups—to understand how different groups perceive DEIB at the org

Orgs should ensure that the selected metrics are clearly tied to overall strategy and that processes exist to track their progress.

A people analytics leader we spoke to mentioned creating a Python script to pull different metrics that they're already collecting around talent acquisition, internal mobility, performance, engagement, and exit rate to understand where the biggest gaps are between different employee groups. This allowed them to quickly identify areas with the biggest gaps, start working on them, and track progress over time.

“The DEIB world is so enormous, and you could do a thousand things. It's hard to understand where to start and where to focus your efforts. We should be intentional about identifying our biggest gaps. Every company has some problems around DEIB, but we should work on finding where our biggest internal gap is and focusing on that first.”

—Head of People Analytics, a large technology company

Figure 14: Questions to ask yourself

- Do we have a clear understanding of the current state of diversity at different levels in our org?
- When it comes to DEIB, where are our biggest internal gaps?
- Do we have a clear understanding of our employees' perceptions of DEIB in the org?
- What other data sources can we leverage to better understand diversity in the org that are not currently being used?
- What are the basic and low-hanging challenges that can be addressed quickly?
- What are the overall goals the org wants to achieve for DEIB?

Source: RedThread Research, 2022.

# Moving up to an intermediate level with DEIB metrics

Once the orgs have a clear sense of where they stand or the “what,” they need to understand the “why,” such as:

- Why do certain groups experience a low level of inclusion and belonging?
- Why are certain groups being promoted at lower rates than others?

Orgs can begin to supplement existing data to gain a deeper understanding of the systemic issues that impact DEIB. When it comes to metrics, orgs should look at data from existing systems:

- Learning & development data
- Performance management data
- Payroll data
- Wellbeing data
- Data from employee feedback comments

A technology provider shared an example of a customer project that conducted text analysis on data from employee feedback to understand why promotion rates for women were low in a company. The analysis revealed that the existing initiatives to drive promotions favored men and received positive feedback from them, as compared with women. Some of the concerns that surfaced included difficulties faced by women

around childcare and the inflexibility around work schedules. The analysis of the data allowed the company to identify the systemic issues that were negatively impacting promotion rates for women and their overall DEIB efforts.

“Metrics are a way to communicate what’s important. Orgs should limit themselves to how many metrics they push. It’s like the weather, I don’t want a million different metrics to know if the weather is good or not. Orgs should figure out the goal (what is ‘good’ weather) and the metrics should help achieve that.”

—Dirk Jonker, Chief Executive Officer, Crunchr

Figure 15: Questions to ask yourself

- What existing tools and tech can be used to collect data on equity, inclusion, and belonging?
- How well are we leveraging existing data sources to collect objective data?
- Do we have a clear understanding of why certain groups have poor perceptions of DEIB within the org?

Source: RedThread Research, 2022.

# Using a mature approach to DEIB metrics

The questions orgs should look to answer at this stage are:

- How can we address existing issues and drive our DEIB efforts effectively?
- How can we measure progress longitudinally?
- What creative analyses or approaches might help us answer questions we haven't yet been able to answer?

When it comes to metrics and data, orgs should consider complementing existing data with:

- Network data
- Communication data from sources such as emails, calendars, meetings, etc.
- Workplace tech data from tools used by employees to get work done such as Zoom, SharePoint, Slack, Teams, and Asana
- Employee reviews and comments on external websites

Orgs should consider using advanced approaches to people analytics such as connecting text analytics with social network data. Text analysis can help orgs identify existing gaps in inclusion. Network analysis can help identify influencers. Orgs can relay feedback to influencers and leverage them to fill those gaps and drive greater efforts.

DEIB is a continuous effort rather than a “once-and-done” approach. Orgs should look externally to compare their performance to avoid becoming complacent in their efforts and update their goals regularly. Specifically, orgs should look at how other high-performing orgs that rank high on DEIB are performing, instead of industry or national averages.

“When it comes to selecting metrics, don't go with the flow, and get something off the internet or another company. How you define metrics really matters, and orgs need to be intentional about what and how they measure them.”

—Lydia Wu, Head of Talent Analytics and Transformation, Panasonic North America

Figure 16: Questions to ask yourself

- What are the adjacent and not-so-obvious areas that can be used to help understand levels of DEIB (e.g., psychological safety, wellbeing, etc.)?
- What additional advanced analytics approaches, such as organizational network analysis (ONA) and text analytics, can we use to measure and track DEIB?
- What external measures, such as supplier or customer diversity, should we be considering for DEIB that we currently don't?
- Are we benchmarking against the top companies that rank high on DEIB?

Source: RedThread Research, 2022.

# Conclusion

When it comes to DEIB, orgs need to do more than provide training and courses to employees. They need to think about and approach it in a holistic manner so that it's built into the way the business is managed, instead of something that's an afterthought or special.

To that end, orgs need to:

- **Understand where they currently stand and how are they perceived by their employees.** They should know what issues currently exist.
- **Understand why those issues exist.** Orgs need to find out the reasons why they are falling short in those areas.
- **Identify what can they do to fix them.** Orgs should plan their targeted initiatives and interventions in order to get the maximum value and results from their efforts.

In order to achieve that, companies need to apply a greater focus, and put more emphasize on using metrics and data than they currently do. As we've mentioned before, the growing demands from customers, investors, and employees around more action on DEIB is likely to keep increasing. Orgs stand to lose a lot more if they do nothing, not just in terms of lagging

performance, engagement, and innovation—but also in future talent that's going to place a lot more importance on these issues going forward.

It's time companies take their DEIB data seriously. Moving forward, we hope to see a greater acceptance of and creative thinking around how these data and metrics can be used to enable all people and do their best work.



# Appendix

Below we share our own DEIB index as well as indices used by other organizations to help understand their DEIB culture.

Figure 17: RedThread's DEIB index



Source: RedThread Research, 2022.

Figure 18: Gartner inclusion index

- **Fair treatment:** Employees at my organization who help the organization achieve its strategic objectives are rewarded and recognized fairly.
- **Integrating differences:** Employees at my organization respect and value each other's opinions.
- **Decision making:** Members of my team fairly consider ideas and suggestions offered by other team members.
- **Psychological safety:** I feel welcome to express my true feelings at work.
- **Trust:** Communication we receive from the organization is honest and open.
- **Belonging:** People in my organization care about me.
- **Diversity:** Managers at my organization are as diverse as the broader workforce.

Source: Gartner.<sup>27</sup>

Figure 19: University of California San Francisco's belonging index

## Engagement

- In the last 7 days, I have received recognition or praise for doing good work
- My supervisor or someone at work, seems to care about me
- At work, my opinions seem to count
- This last year, I have had opportunities at work to learn and grow

## Roadmap

- I know where to find information and resources that I need to be effective
- I have a clearly defined path for development and growth

## Manager advocate

- My manager or supervisor serves as a strong advocate for our unit / department
- My manager or supervisor is consistently trying to help me progress in my role

## Unconscious bias

- I am respected for who I am as a person
- I have the same opportunities for advancement and other employees at my organization with similar experience and qualifications

Source: University of California San Francisco.<sup>28</sup>

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Stacia is a researcher, and thought leader on talent management, leadership, D&I, people analytics, and HR technology. A frequent speaker and writer, her work has been featured in *Fortune*, *Forbes*, *The New York Times*, and *The Wall Street Journal* as well as in numerous HR trade publications. Stacia co-founded RedThread Research in 2018 after leading talent and workforce research for eight years at Bersin by Deloitte. Before Bersin, Stacia spent nearly five years conducting research and creating learning content for the Corporate Leadership Council, part of CEB/Gartner. She has an MBA from the University of California, Berkeley, a master's degree from the London School of Economics, and undergraduate degrees from Randolph-Macon Woman's College.



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