

Chapter 9

Measuring Progress

Facilitator Notes

Chapter 9 on *Measuring Progress* provides tools and strategies to help individuals, firms, and institutions track and assess their equity, diversity, and inclusion (EDI) efforts. It emphasizes the importance of moving beyond intention to impact and building accountability through thoughtful, transparent, and sustained measurement.

What this guide includes:

- Definitions of what “progress” looks like when aiming for equity.
- The difference between performative metrics and meaningful measurement.
- Strategies for evaluating organizational policies, culture, and outcomes.
- Tools for collecting and analyzing both quantitative and qualitative data.
- Reflection prompts to help organizations assess where they are and where they want to go.

Use this outline to:

- Understand the importance of intentional measurement in advancing equity goals.
- Identify metrics that matter—and how to avoid common pitfalls.
- Set meaningful benchmarks and evaluate cultural shifts over time.
- Build feedback loops that include lived experiences and frontline insight.
- Create transparency and accountability around EDI commitments.

Suggested Pre-Read:

- To maximize engagement and discussion, participants should read the corresponding chapters one page, [Executive Summary](#).

Corresponding Learning

Participants will be able to:

- Explain why measurement is critical to advancing equity, diversity, and inclusion in organizations.
- Identify key metrics and sound data practices for tracking EDI progress at both individual and firm levels.
- Analyze examples of effective measurement strategies and assess their own organization's strengths and gaps.
- Reflect on their role in the measurement process and identify specific actions they can take to support EDI tracking and accountability.
- Develop a measurable EDI goal for their practice or workplace and outline next steps to evaluate and communicate progress.

SLIDE 2 MEASURING PROGRESS

- It is said that if you measure it, you can manage it. To advance equity, diversity, and inclusion (EDI), set goals, build strategies, and measure progress from a baseline. Keep in mind that not everything of value can be quantified.
- This guide points out underlying issues that can be managed during the development and use of metrics.

Notes

1. **What do you hope to get out of today?**
 2. **Why is this topic important to you or your firm?**
 3. **Set expectations for rules of engagement**
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SLIDE 3 WHAT DOES MEASURING PROGRESS MEAN?

- To truly advance EDI requires being able to evaluate progress that results from the strategies you put in place.
- Gather and analyze data, set baseline → identify an area of focus → set goals → design strategies → measure change and progress.

Notes

1. **Quantitative measures, when standardized and tracked consistently over time, can indicate progress and allow comparison with benchmarks and profession-wide data.**
2. **Qualitative data, with their richer responses about perceptions and stories of experiences, provide context for the quantitative data and suggest hypotheses and ideas for action.**
3. **Data is never completely objective; it is always subject to bias and preconceptions.**
4. **What does “progress” mean to you or your firm?**
5. **What kinds of EDI metrics have you found most valuable—or would you like to see at your firm/organization?**

SLIDE 4 WHY MEASURING MATTERS

- Measuring is crucial for advancing EDI as it helps pinpoint strengths, challenges, and areas for improvement.
- It enables firms to set goals, track progress, and design effective strategies.
- Metrics provide clarity, accountability, and transparency, driving positive change in workplace culture, employee satisfaction, and firm reputation.
- Data can be a catalyst for difficult conversations: it is difficult to dismiss issues that are viewed as a larger pattern and identify system-level solutions.
- Well-designed assessment can reduce bias and result in stronger solutions.

Notes**1. Measurable equity-related goals could include:**

- improved employee engagement, well-being, and sense of belonging
- increased retention
- more favorable exit interviews
- decrease in pay disparities

2. Have you seen or experienced barriers when attempting to collect or use EDI data?

SLIDE 5 MEASURING: MORE THAN JUST TALK

- If EDI progress isn't tracked, it often falls behind. Measuring progress signals that equity is a priority—not a side initiative.
- Examples of trackable measures:
 - Pay equity by gender, race, and role
 - Advancement, recognition, and project leadership rates
 - Employee experience surveys disaggregated by identity
 - Accessibility and accommodation usage

Notes

- 1. What's one useful metric your firm could start tracking that could result in action?**
- 2. Who participates in setting and reviewing metrics?**
- 3. Who is collecting and interpreting data? What perspectives might be missing?**

SLIDE 6 WHAT GOOD LOOKS LIKE

Notes

1. Review each example of what good looks like. Make a check mark next to practices that you can find in your firm or organization, a question mark for those where you are not sure, and a minus for those that are missing.
 2. What areas are strong, which are you not sure about, and which areas are weak?
 3. Ask for volunteers to share examples.
 4. What can you do to influence change?
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SLIDE 7 INDIVIDUAL ACTIONS TO MEASURE PROGRESS

- Understand equity goals and how they are measured and shared.
- Share honest feedback with leadership and ask for more information when needed.
- Look for ways to make data meaningful and tell a compelling story.
- Advocate for your firm to participate in profession-wide surveys that help provide benchmarks and better understandings of the state of the profession.
- Make data collection and measurement as simple as possible.

Notes

1. How familiar are you with your firm's current equity goals and how progress is measured?
2. Have you ever shared feedback about equity-related concerns or asked for data? What was the result—or what held you back?

SLIDE 8 FIRM ACTIONS TO MEASURE PROGRESS

- Establish a baseline so you can measure progress. You won't know how far you've come if you don't know where you started.
- Strategic plans should include goals that link to actions and measurement.
- Engage diverse leaders, managers, and employees at all levels in developing strategies and solutions, since perceptions of what is needed and what will work may vary significantly depending on perspective.
- Share progress updates internally and externally.
- Use sound data practices:
 - Clearly define who and what you're measuring.
 - Clarify how data will be used, and allow participants to opt out.
 - Communicate intent and goals frequently across the organization; make leadership accountable.
 - Ensure anonymity and confidentiality where possible, especially in small or sensitive settings.
 - Use multiple data sources (e.g., surveys, focus groups, exit interviews) for deeper insights.
 - Disaggregate data to reveal differences between subgroups and identify targeted interventions.
 - Track demographic data to measure and advance diversity, but commit to equity and inclusion.

Notes

1. **Has your firm or organization established a clear baseline for EDI efforts?**
 2. **What feedback loops exist (or are needed) in your organization?**
 3. **What does your organization do to ensure data collection is ethical, inclusive, and confidential—especially in small teams or firms?**
 4. **How might disaggregated data help your team or leadership uncover hidden patterns or inequities?**
 5. **Some frameworks for evaluating your organization's knowledge and level of action and initiating EDI conversations include:**
 - **IDI, Harvard's Project Implicit, the Antiracist Transformation Continuum, and the APTMetrics Stages of D&I Evolution.¹**
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SLIDE 9 CONSIDER SCENARIOS & REFLECTIONS**Notes**

1. **Select a scenario from the chapter that you feel will resonate with the group. Ask a volunteer to read it aloud. Discuss the discussion prompts in small groups and share back with the full group.**

SLIDE 10 NOW WHAT?

- Identify one SMART equity-related goal in your practice or workplace.
 - What would progress look like?
 - What would you measure to know you're on track?
 - Who needs to be involved?

Notes

- 1. Give everyone the option to share.**
- 2. Suggest they check in with a peer or accountability partner one month later.**
- 3. Note that there are many more ideas for action and additional scenarios in the full chapter.**
- 4. If you have specific resources, committees, or additional worksheets, you can promote those here.**

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1. 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. Martínez, "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>.