



The Guides for Equitable Practice: Chapter 9





Guides for Equitable Practice: Measuring Progress

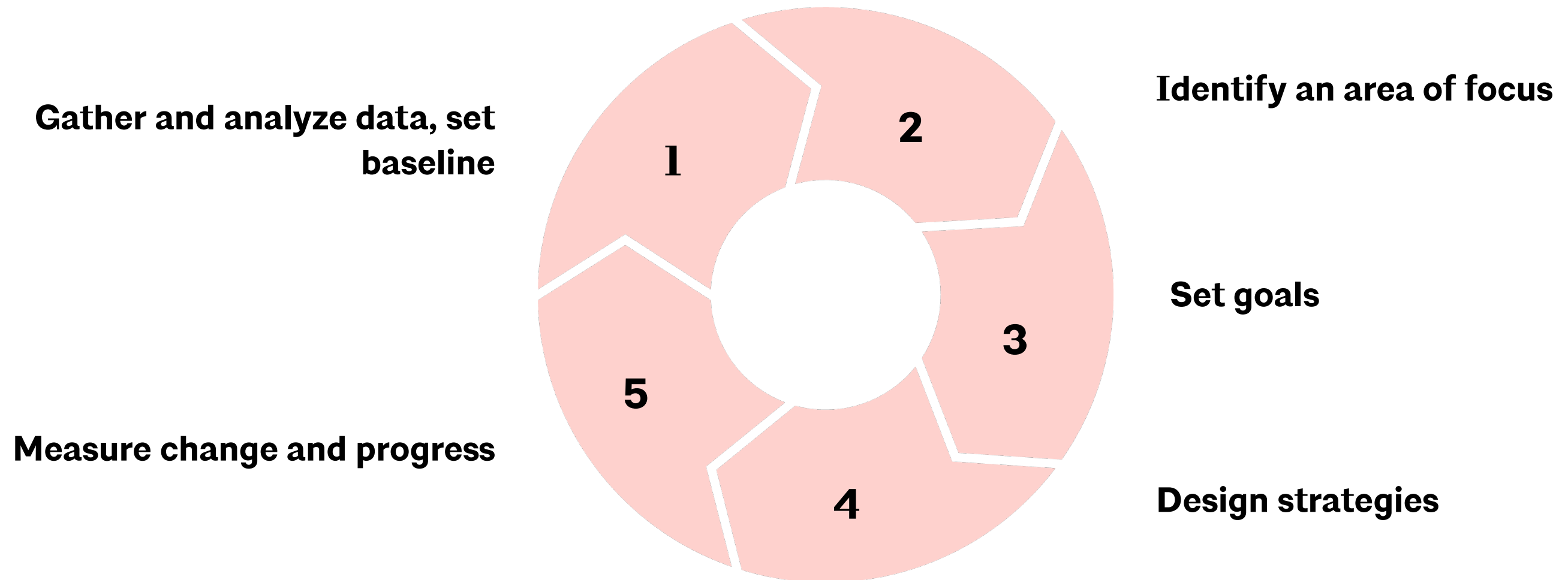
It is said that if you can measure it, you can manage it.

- 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 impact the development and use of metrics.



What does measuring progress mean?

To truly advance equity, diversity, and inclusion (EDI) requires being able to evaluate progress resulting from the strategies you put in place.





Why measuring matters

Advancing equity

Measuring is crucial for advancing equity, diversity, and inclusion (EDI) as it helps identify strengths, challenges, and areas for improvement.

Setting goals

It enables firms to set goals, track progress, and design effective strategies.

Providing clarity

Metrics provide clarity, accountability, and transparency, driving positive change in workplace culture, employee satisfaction, and firm reputation.

Catalyst for conversations

Data can be a catalyst for difficult conversations.

Reducing bias

Well-designed assessments reduce bias and result in stronger solutions.



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



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 that you are not sure
- A minus for those that are missing.

GUIDE 9 • MEASURING PROGRESS

WHAT DOES GOOD LOOK LIKE?

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 while taking into consideration their limitations and potential for bias

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 do not distract from noticing other things that matter

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

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



Individual actions to measure progress

Understand equity goals

Understand equity goals and how they are measured and shared.

Share honest feedback

Share honest feedback with leadership and ask for more information.

Make data meaningful

Make data meaningful and tell a compelling story.

Advocate for participation

Advocate for firm participation in profession-wide surveys.

Simplify measurement

Simplify data collection and measurement.



Firm actions to measure progress

- Establish a baseline to measure progress.
- Link strategic plans to measurable goals.
- Engage diverse leaders and employees at all levels.
- Share updates internally and externally.
- Use sound data practices:
 - Clearly define what and who you're measuring.
 - Be clear about data purpose and opt-out options.
 - Communicate goals frequently; hold leadership accountable.
 - Ensure anonymity and confidentiality.
 - Use multiple sources (e.g., surveys, focus groups).
 - Disaggregate data for subgroup insights.





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

Consider scenarios & reflections

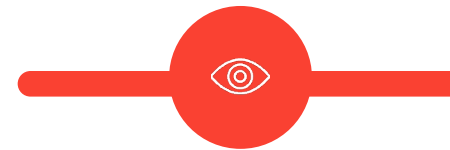
Read, discuss in small groups, and share insights



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?**