



# **DEI360 Assessment**

**Summary & Overview Report**

DEI Survey

Summary & Assessment

**SAMPLE ONLY**

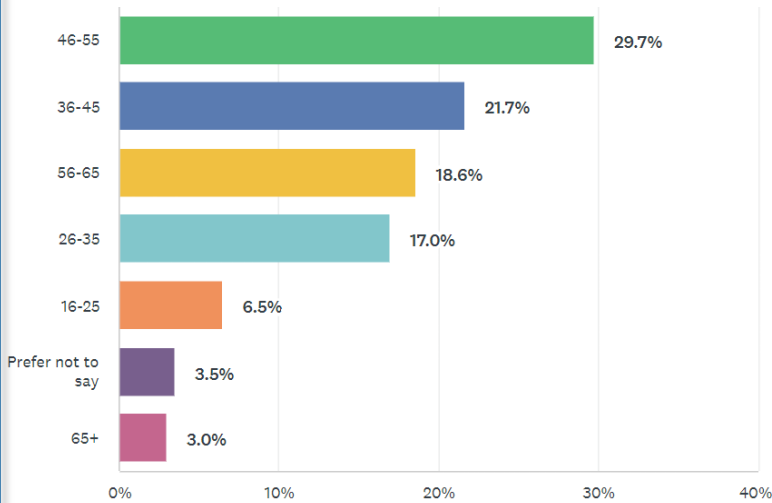
## Executive Summary:

This DEI assessment provides a high-level analysis of 910 completed and 28 partially completed surveys from XYZ's workforce (a response rate exceeding 85%). We evaluated the current mechanism for DEI Best Practices and Maturity and found opportunities for immediate improvement related to the experience of XYZ's LGBTQ2SIA+ community and among workers at the 'intersectionalities' of gender, race & ethnicity, disability, indigenous status, and LGBTQ2SIA+ identity. We also found significant disparities in DEI experience across some work functions and locations.

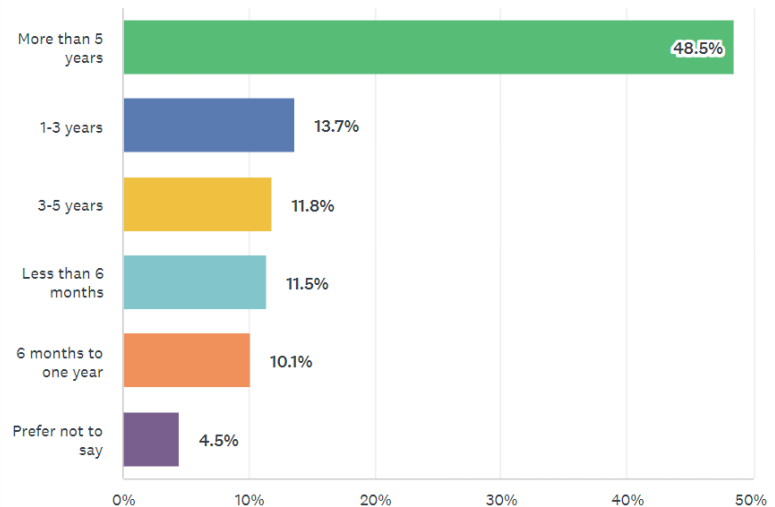
The demographics of the XYZ workforce were captured across 13 dimensions.

## Demographics

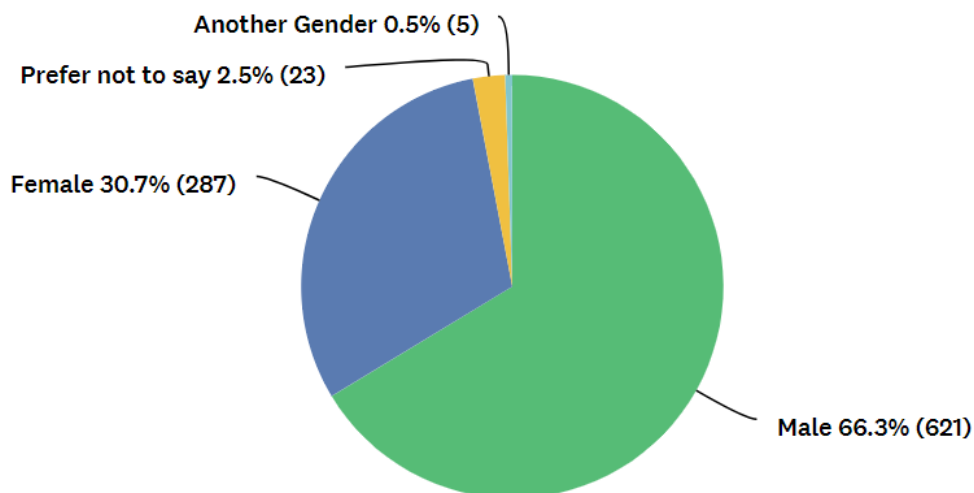
### Age (908)



### Tenure (908)

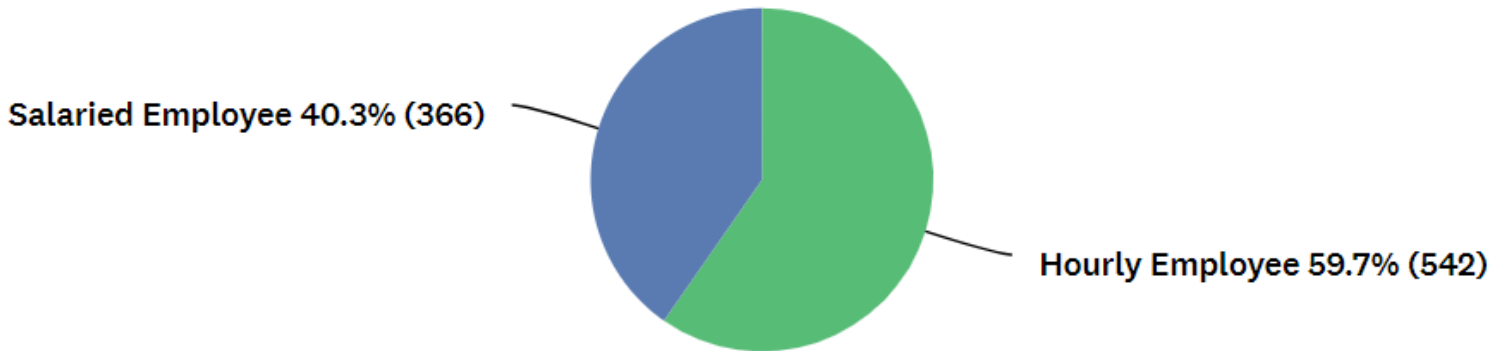


### Gender (936)

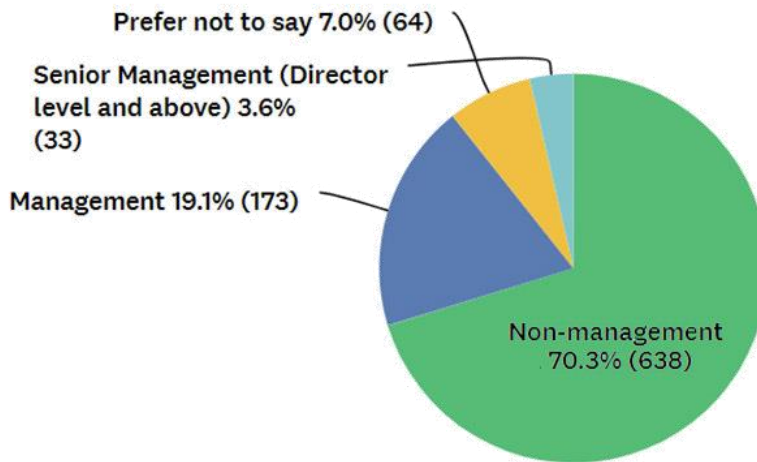


# Executive Summary: Survey Demographics Continued

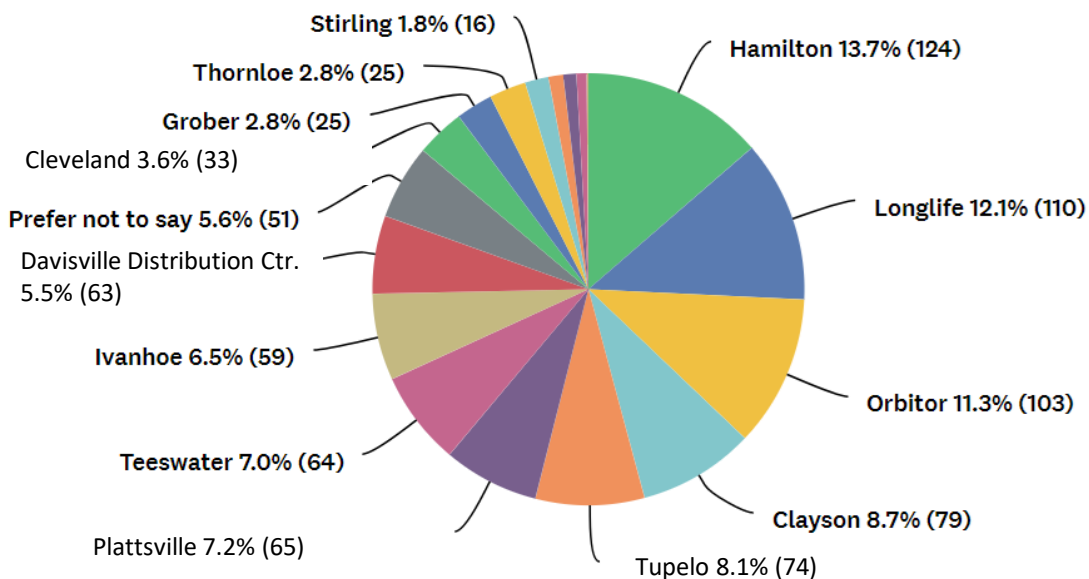
## Employment Type (908)



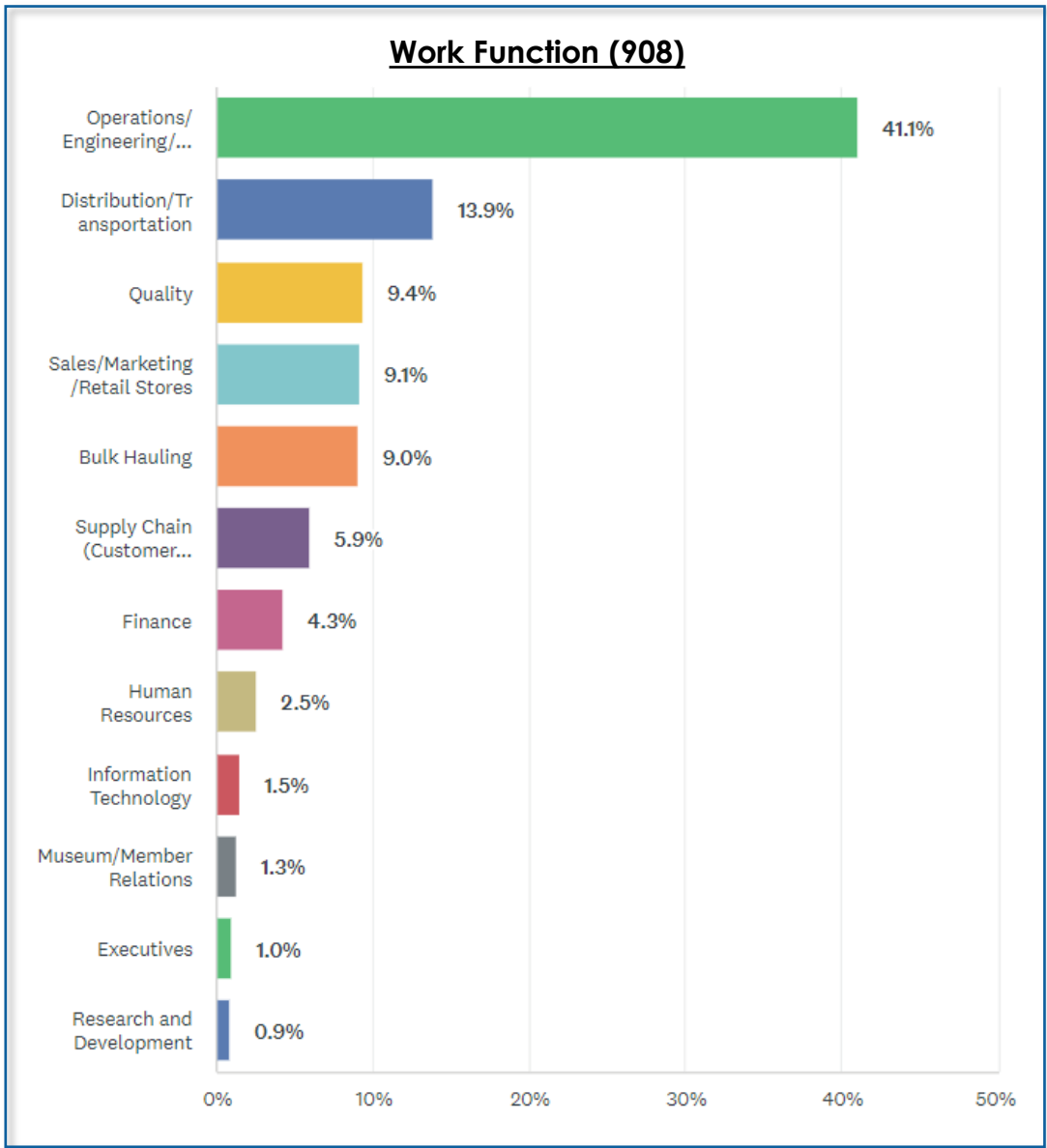
## Role (908)



## Work Location (908)



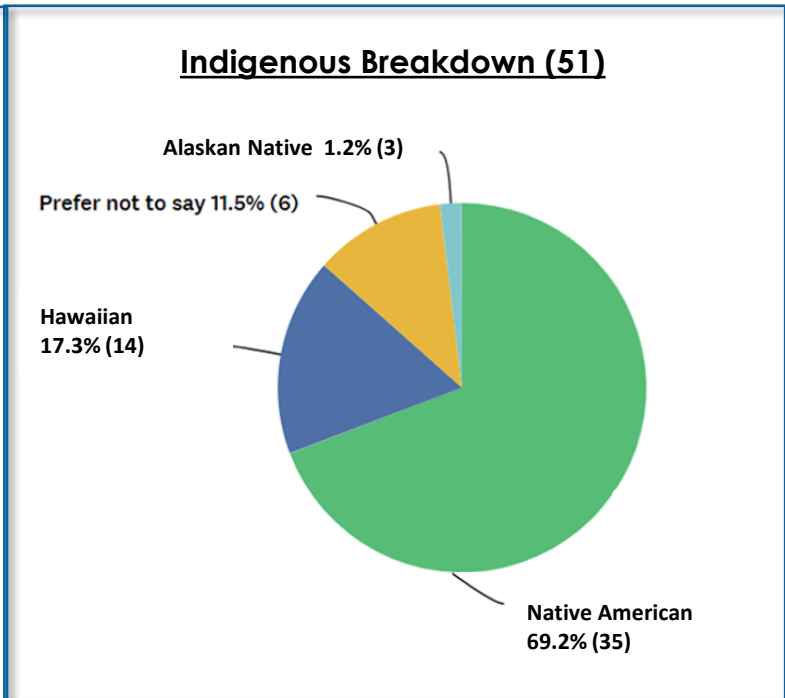
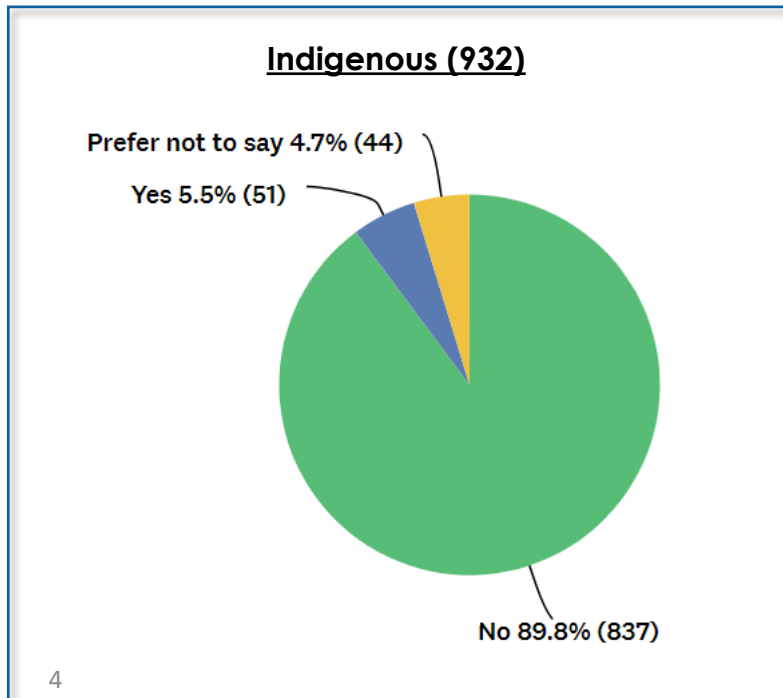
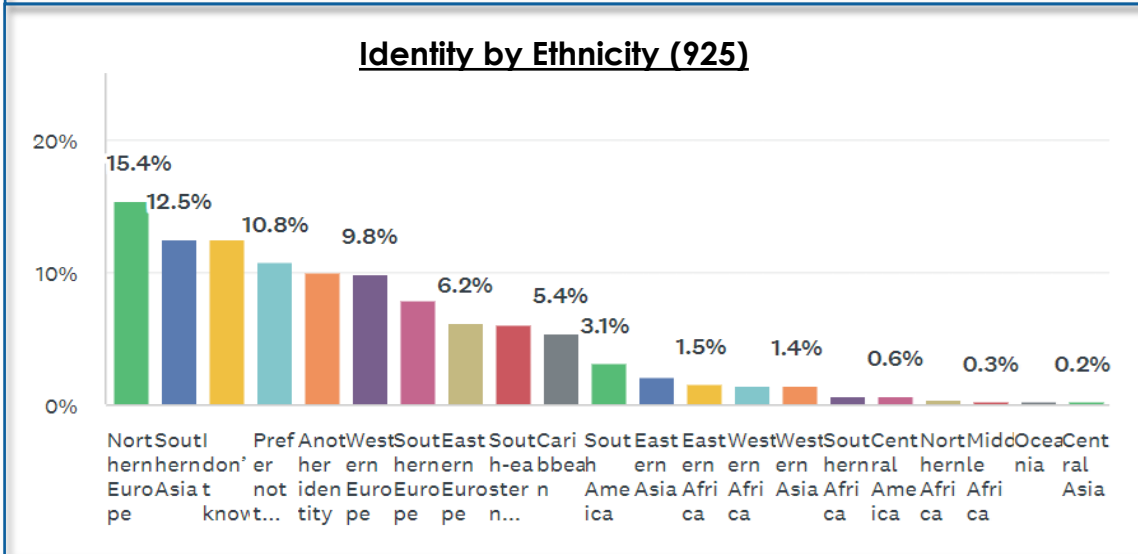
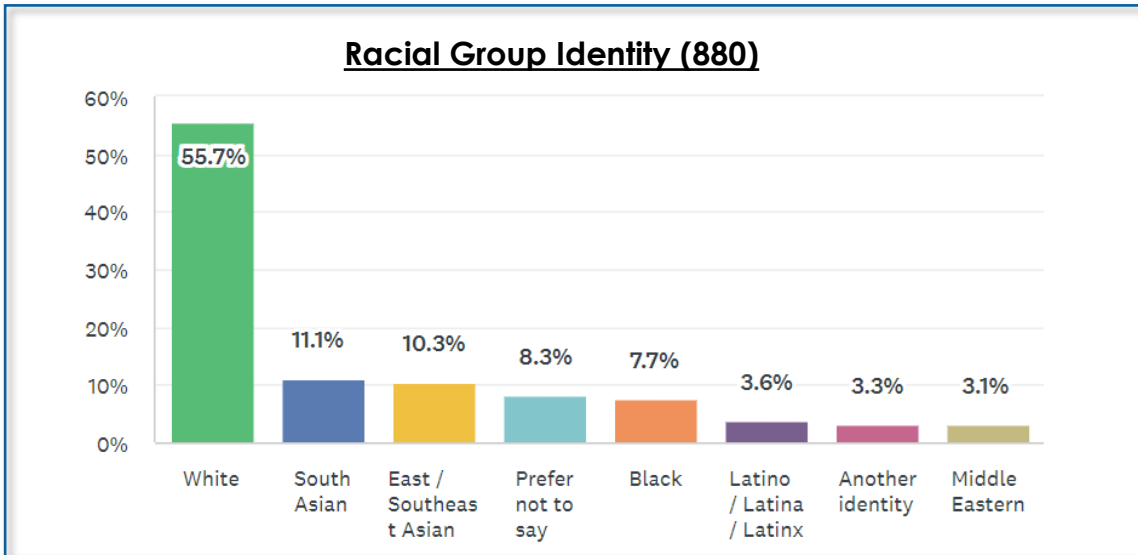
# Executive Summary: Survey Demographics Continued



Work Function	Count
Supply chain	54
Museum	12
Operations	373
Quality	85
Bulk Hauling	82
Sales/Marketing	83
Finance	39
Distribution	126
R&D	8
IT	14
HR	23
Executives	9

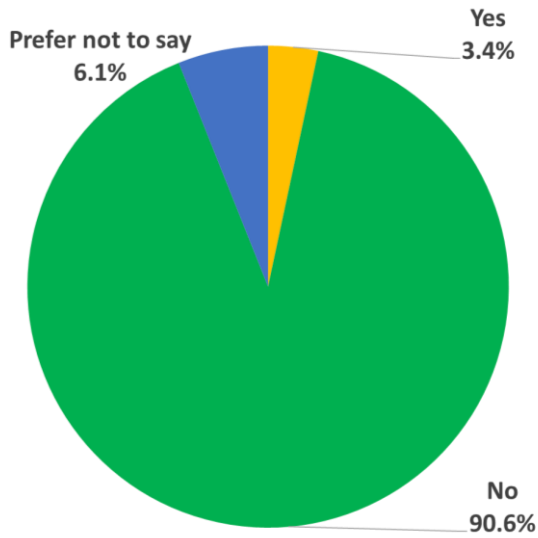
- Answer Choices**
- Bulk Hauling (46)
  - Distribution/Transportation (120)
  - Executives (13)
  - Finance (15)
  - Human Resources (18)
  - Information Technology (16)
  - Museum/Member Relations (13)
  - Operations/ Engineering/ Process Excellence (619)
  - Quality (73)
  - Research and Development (11)
  - Sales/Marketing/Retail Stores (90)
  - Supply Chain (Customer Service/Planning/Procurement) (51)

# Executive Summary: Survey Demographics Continued

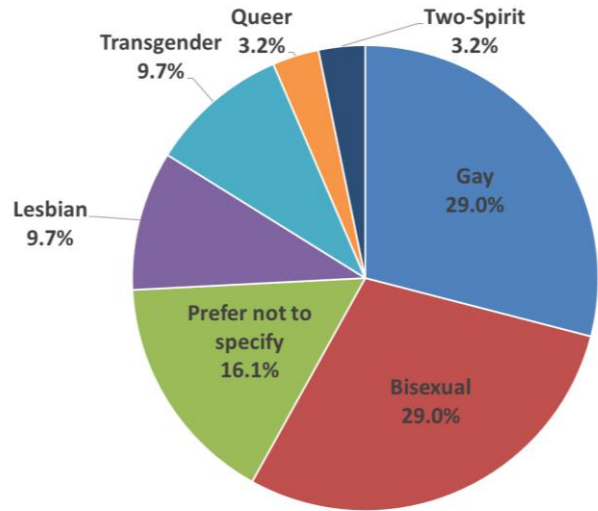


# Executive Summary: Survey Demographics Continued

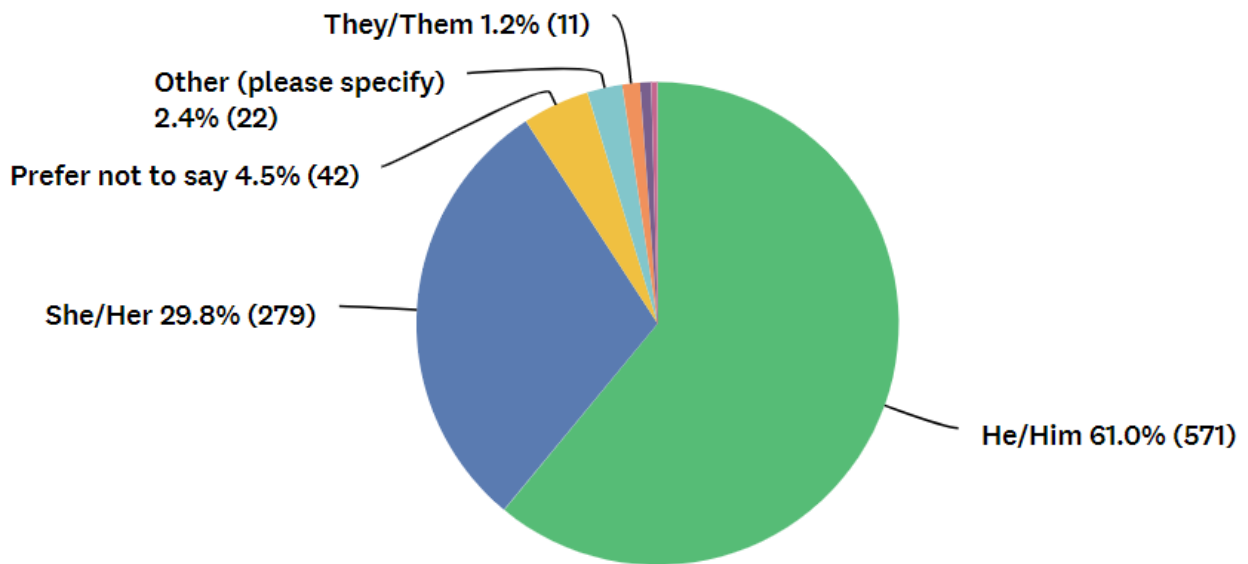
**Identify as LGBTQ2SIA+ (927)**



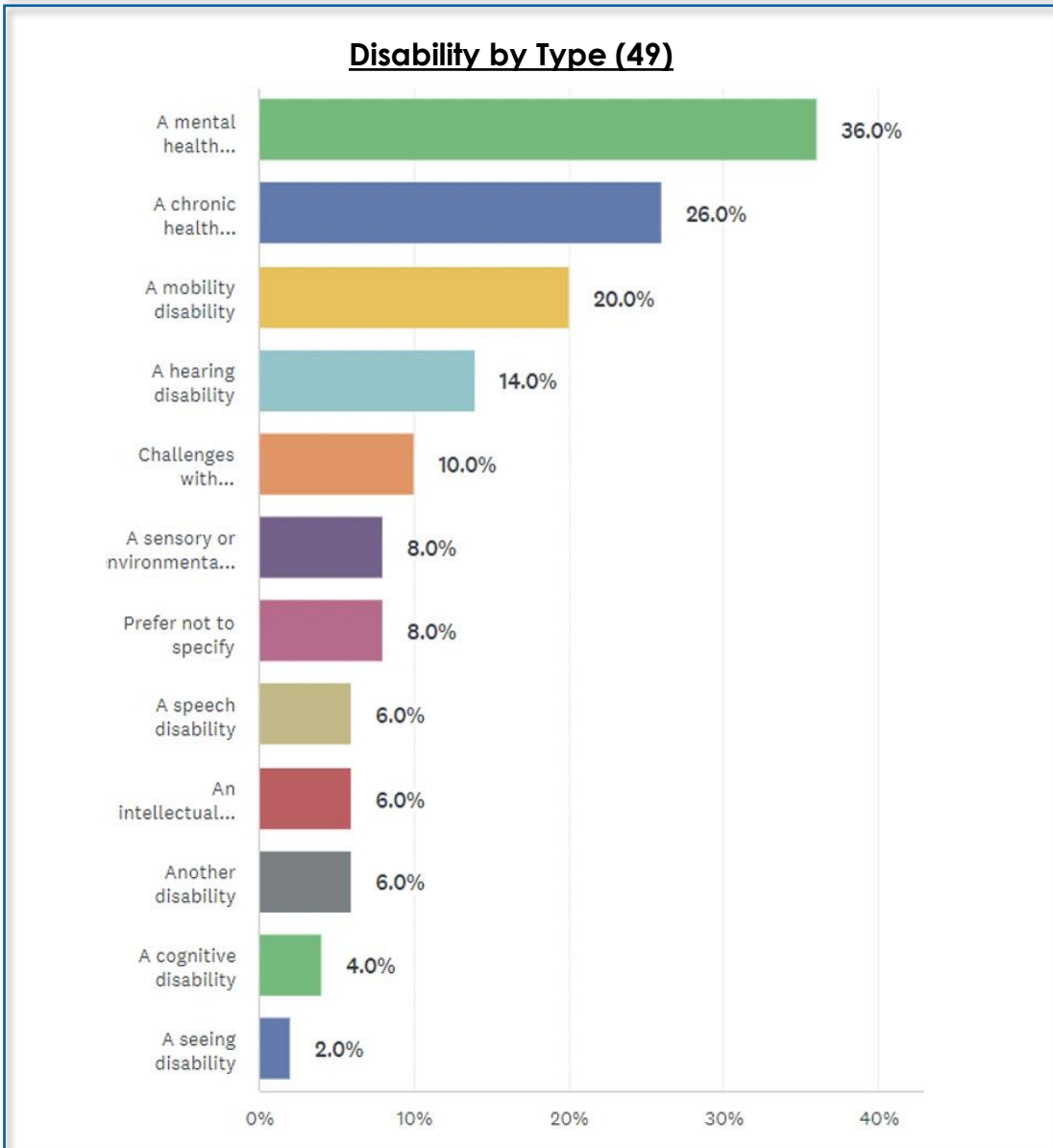
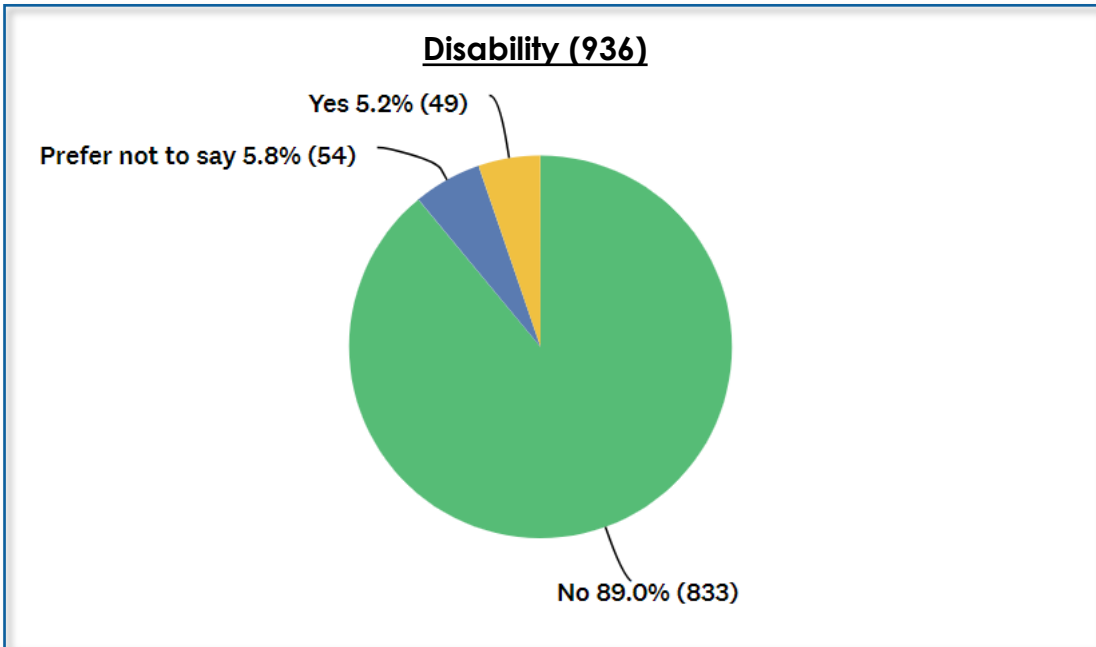
**Specific LGBTQ2SIA+ (31)**



**Preferred Pronouns (936)**



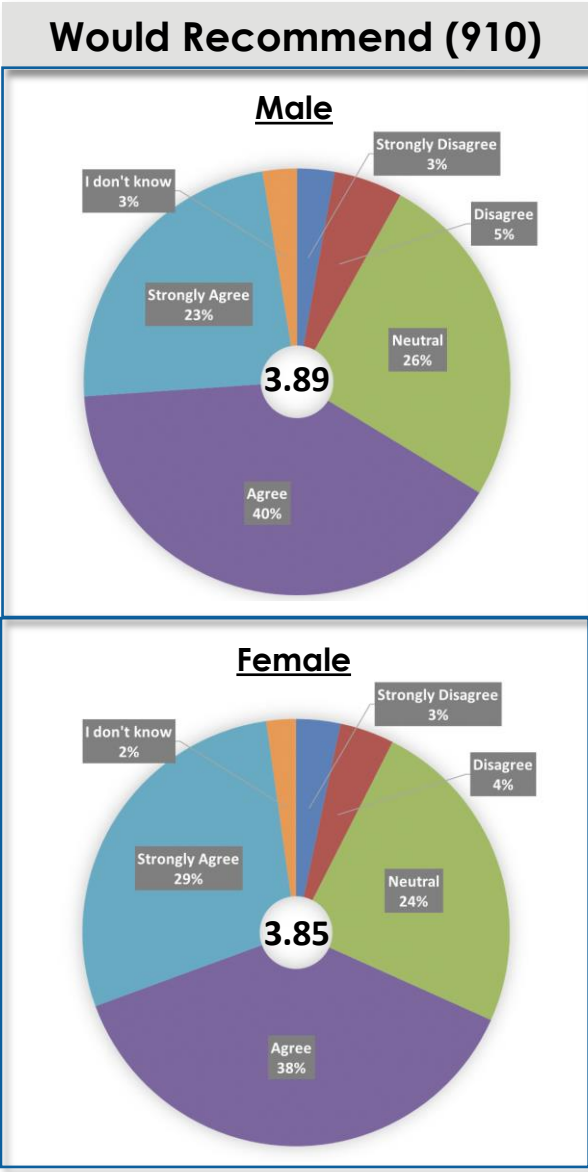
# Executive Summary: Survey Demographics Continued



# Executive Summary: Employee Recommendation

Overall, respondents report a positive DEI-related experience at XYZ and would generally recommend it to friends and family as a diverse, equitable, and inclusive workplace. In response to whether respondents would recommend XYZ, a strong majority agreed, earning XYZ a high D&I recommendation Score of 63.4% (subtracting net detractors from net promoters). When calculated as an average score out of 5, XYZ scores 3.87. Salaried, short-tenure, POC, and senior management respondents scored XYZ higher than the average across all respondents. LGBTQIAS2+, Disabled, those working in R&D, and respondents from the Davisville and Ivanhoe work locations were significantly less enthusiastic about recommending XYZ, but still positive overall.

Variable	Score	Red Flag
Up to 3 Years Tenure	4.03	N
3-5 Years Tenure	3.75	N
5+ Years Tenure	3.81	N
Salaried	3.99	N
Hourly	3.79	N
Non-Management	3.82	N
Management	4.04	N
Sr. Management	4.13	N
Black	3.94	N
Indigenous	3.80	N
Asian	4.03	N
White	3.78	N
POC	4.02	N
Female + Black	3.57	N
LGBTQIAS2+	3.31	—
Disabled	3.44	—
Davisville Distribution Ctr.	3.43	—
Ivanhoe	3.53	—
Female + Indigenous	3.44	—
Female + Disabled	3.33	—
R&D	3.29	—
Disabled + LGBTQIA	3.00	Y
Disabled + Indigenous	3.00	Y
POC + LGBTQIA	3.00	Y
<b>Female + Indigenous + Disabled</b>	<b>2.75</b>	<b>Y</b>





## Executive Summary: Diversity

In general (in the aggregate) across each dimension of the, the 900+ respondents who participated in the survey raise no red flags (defined as cases where 25% or more respondents answered in the negative to a factor of diversity, equity, or inclusion & belonging). We surveyed diversity at the workforce and management levels across 7 dimensions with no red flags raised by gender, race & ethnicity, disability, or indigenous status. However, more than a quarter of those who identify as LGBTQ2SIA+ disagree or strongly disagree that XYZ is diverse by the LGBTQ2SIA+ factor.

Variable	Aggregate Score	Red Flag?
Workforce Diversity Overall	75.2	N
Management Diversity Overall	66.5	N
Workforce Diversity Male	79.1 (85.1 by gender)	N
Management Diversity Male	71.1 (76.7 by gender)	N
Workforce Diversity Female	71.6 (88 by gender)	N
Management Diversity Female	60 (70.1 by gender)	N
Workforce Diversity POC	86.2 (99 by race & ethnicity)	N
Management Diversity POC	74.6 (74.5 by race & ethnicity)	N
Workforce Diversity Indigenous	75.5 (77.5 by race & ethnicity)	N
Management Diversity Indigenous	59.1 (69.2 by race & ethnicity)	N
Workforce Diversity Disability	71.3 (59.5 by physical & 72.5 by cognitive ability)	N
Management Diversity Disability	57.5 (41.7 by physical & 52.8 by cognitive ability)	N
Workforce Diversity LGBTQ2SIA+	49.9 (10.7 by LGBTQ2SIA+ Identity)	Y (by LGBTQ2SIA+ Identity)
Management Diversity LGBTQ2SIA+	31.8 (-10.7 by LGBTQ2SIA+ Identity)	Y (by LGBTQ2SIA+ Identity)
Workforce Diversity R&D	6.7 (-20 by LGBTQ2SIA+ Identity)	Y (by all)
Management Diversity R&D	-8.4 (-40 by LGBTQ2SIA+ Identity)	Y (by 5 of 7)

## Executive Summary: Diversity Continued

And where various 'intersectionalities' are concerned, numerous red flags appear by a wide variety of diversity factors, including LGBTQ2SIA+, age, ability, and thought, both at the workforce and management levels.

Variable	Aggregate Score	Red Flag
Workforce Diversity LGBTQ2SIA+ AND Female	24.3 (57.1 by gender, -15.4 by LGBTQ2SIA+ Identity)	Y (by LGBTQ2SIA+ Identity and Thoughts/Perspectives))
Management Diversity LGBTQ2SIA+ AND Female	5.9 (35.7 by gender, -38.5 by LGBTQ2SIA+ Identity)	Y (by LGBTQ2SIA+ Identity and Thoughts/Perspectives)
Workforce Diversity LGBTQ2SIA+ AND Disability	52.4	Y (by LGBTQ2SIA+ Identity and Race)
Management Diversity LGBTQ2SIA+ AND Disability	23.8 (-16.7 by LGBTQ2SIA+ Identity)	Y (by LGBTQ2SIA+ and Disability)
Workforce Diversity Female + Indigenous + POC	38.6 (-50 by LGBTQ2SIA+ Identity)	Y (by LGBTQ2SIA+ and Age)
Management Diversity Female + Indigenous + POC	16.4 (-25 by disability and LGBTQ2SIA+ Identity)	Y (by age, disability, LGBTQ2SIA+ identity and Thought/Perspectives)
Workforce Diversity Female +POC + Hourly	66.2 ( 0 by LGBTQ2SIA+ Identity)	Y (by LGBTQ2SIA+)
Management Diversity Female +POC + Hourly	50.8 (75 by race & ethnicity)	Y (by LGBTQ2SIA+)
Workforce Diversity POC in Davisville Distribution Center	68.5 (68 by race & ethnicity)	N
Management Diversity POC in Davisville Distribution Center	25.2 (20 by race & ethnicity)	Y (by age, and Thought/Perspectives)
Workforce Diversity 3-5 Years Tenure in Davisville Distribution Center	1.4 (-33.3 by LGBTQ2SIA+ Identity & -33.3 by Thoughts/Perspectives)	Y (by Gender, Physical Ability, LGBTQ2SIA+ Identity, AND Thoughts/Perspectives)
Management Diversity 3-5 Years Tenure in Davisville Distribution Center	-14.4 (-31.3 by Gender, -12.5 Physical Ability, -41.7 LGBTQ2SIA+ Identity AND -56.3 Thoughts/Perspectives)	Y (by Race, Gender, Physical Ability, LGBTQ2SIA+ Identity AND Thoughts/Perspectives)
Workforce Diversity Female + Museum/Member Relations	-27.1 (negative across all factors except age)	Y (By all factors)
Management Diversity 3-5 Years Tenure in Davisville Distribution Center	-47.5 (Zero or negative across all factors)	Y (by all factors)

## Executive Summary: Equity

Across the four dimensions of equity that we surveyed, none raises a red flag at the aggregate level nor across gender, race & ethnicity, ability, or indigenous status. Here again, however, red flags appear among the LGBTQ2SIA+ community at XYZ, as well as in several 'intersectionalities,' and across ten work locations and work types.

Variable	Score	Red Flag
Male	72.8	N
Female	54.5	N
POC	79.1	N
White	58.7	N
Disability	46.8	N
Indigenous	70.9	N
Non-Management	65.6	N
Management	72.5	N
Sr. Management	86.6	N
Salaried	65.4	N
Hourly	67.4	N
Operations	70.2	N
Supply Chain	67.2	N
Bulk Hauling	78.7	N
Distribution/ Transport	62.1	N
IT	141	N
HR	68.6	N
Cleveland	121.8	N
Grober	106.3	N
Plattsville	64.2	N
Tupelo	81.7	N

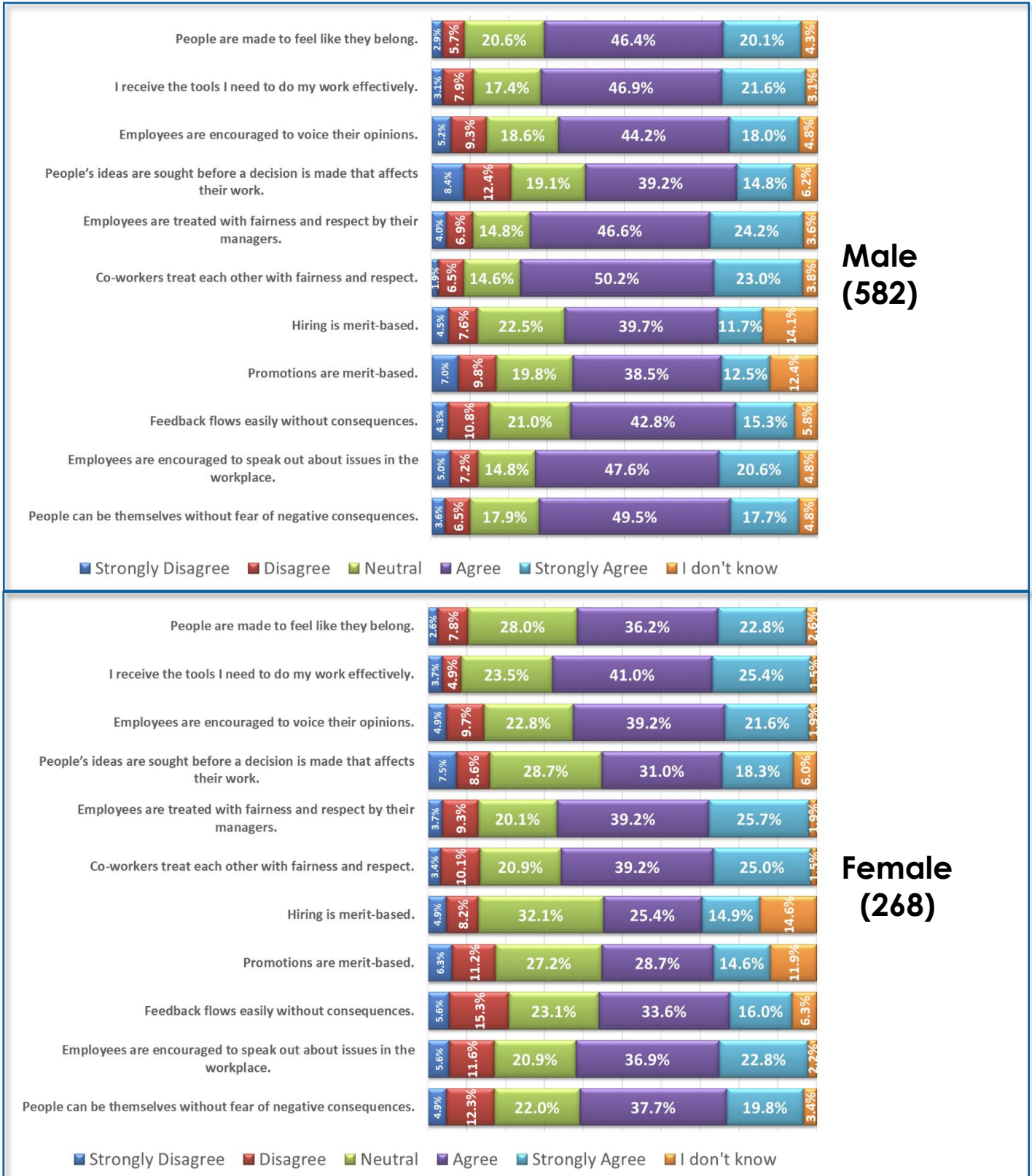
Variable	Score	Red Flag
Ladouceur	118.8	N
Longlife	92.5	N
Stirling	64.4	N
Teeswater	67.3	N
Thornloe	75.3	N
Remote	79.9	N
Up to 3 Years Tenure	84.6	N
3-5 Years Tenure	54.4	N
More Than 5 Years Tenure	58.5	N
Female + Indigenous	56.9	N
Male + Indigenous	85.4	N
BIPOC	79	N
Male BIPOC	106	N
LGBTQ2SIA+	18.1	Y (3 of 4 factors of equity)
Female BIPOC	15	Y (all factors of equity)

## Executive Summary: Equity (cont.)

Variable	Score	Red Flag
Quality	54.2	Y (Comp & Ben)
Museum	38.3	Y (Harassment, Bullying, Discrimination)
Sales	62.4	Y (Access to L&D)
Finance	63.6	Y (Access to L&D)
R&D	-21.5	Y (all categories except harassment and bullying)
Davisville	39.4	Y (Access to L&D, Discrimination)
Clayson	65.5	Y (Access to L&D, Comp & Ben)
Guelph	38.1	Y (Access to L&D, Harassment & Bullying)
Ivanhoe	43.9	Y (Comp & Ben)
Orbitor	58.3	Y (Access to L&D)
LGBTQ2SIA+	18.1	Y (across all factors except Comp & Ben)
LGBTQ2SIA+ Female	-19.6	Y (across all factors)
Female + Disabled	36.1	Y (across all factors except access to L&D)
Female + POC	67.4	Y (access to L&D)
Female + Cleveland	0	Y (all factors except Comp & Ben)
Female + Quality	50.7	Y (Comp & Ben, Access to L&D)
Female + Museum	14.7	Y (all except comp & ben)
Female + R&D	-42.1	Y (Comp & Ben, Access to L&D)
Female + Disabled + Hourly	42.3	Y (across all categories)
Male + Disabled + Hourly	43.9	Y (access to L&D)
Female + LGBTQ2SIA+ + Hourly	-15	Y (across all categories)
Disabled + Indigenous	11.7	Y (Comp & Ben, Harassment, Bullying)

# Executive Summary: Inclusion & Belonging

Across the 11 factors surveyed under the Inclusion & Belonging category, none rise to the level of a red flag in the aggregate, nor by gender, race & ethnicity, or indigenous status. Those who identify as disabled and LGBTQ2SIA+ raise red flags across one or more dimension of Inclusion & Belonging. Otherwise, as in the Diversity and Equity categories, red flags appear at the 'intersectionalities,' and in some work locations and functions.



## Executive Summary: Inclusion & Belonging (cont.)

Variable	Score	Red Flag
Disabled	42.7	Y (Provide feedback w/o consequences)
Indigenous	68	N
LGBTQ2SIA+	13.5	Y (6 of 11 factors)
White	56.5	N
POC	77.2	N
BIPOC	90	Y (hiring merit based)
Non-Management	59.6	N
Management	79.3	N
Sr. Management	93	N
Salaried	70.9	N
Hourly	59.5	N
Operations	68.9	N
Supply Chain	70.4	N
Bulk Hauling	70.4	N
Sales/Marketing	54.4	N
Finance	52.9	Y (Feedback w/o consequences and ideas sought before decisions made)
Distribution/ Transport	48.9	Y (Promotions merit-based and ideas sought before decisions made)
R&D	10.6	Y (against 7 of 11 factors)
IT	164.5	N
HR	75.3	N
Cleveland	110.7	N

## Executive Summary: Inclusion & Belonging (cont.)

Variable	Score	Red Flag
Davisville	27.2	Y (across 4 of 11 factors)
Clayson	64.9	Y (promotions merit based and ideas sought before decisions made)
Grober	106	N
Guelph	35.7	Y (across 5 of 11 factors)
Plattsville	63.5	N
Tupelo	68.4	N
Ivanhoe	47.3	N
Ladouceur	117.3	N
Longlife	87.4	N
Orbitor	62.7	N
Teeswater	67.6	N
Thornloe	66.1	N
Up to 3 years tenure	86.8	N
3-5 years tenure	41.1	Y (promotions merit based, ideas sought before decisions made)
Over 5 years tenure	55.6	N
Disabled + LGBTQ2SIA+	14.4	Y (against 8 of 11 factors)
Disabled + Indigenous	21.6	Y (against 7 of 11 factors)
LGBTQ2SIA+ POC	0	Y (against all factors)
POC + Female	72.6	N
Female + Black	16.2	Y (against 9 of 11 factors)
Female + Disabled	28.3	Y (against 4 of 11 factors)

## Executive Summary: Inclusion & Belonging (cont.)

Variable	Score	Red Flag
Female + Indigenous	40	Y (Be yourself w/o fear of consequences)
Male + Indigenous	95.8	N
Female + LGBTQ2SIA+	-22.1	Y (across all factors)
Male + LGBTQ2SIA+	47.8	Y (speak out about workplace issues & ideas sought before decisions)
Cleveland + Male	44.8	Y (feedback w/o consequences & ideas sought before decisions)
Cleveland + Female	-2.5	Y (across 9 of 11 factors)
Davisville + Male	23.8	Y (across 5 of 11 factors)
Davisville + Female	60.3	N
Clayson + Male	67.9	Y (promotions merit-based and ideas sought before decisions)
Clayson + Female	59.3	Y (across 5 of 11 factors)
3-5 Years Tenure + Male	48	Y (Ideas sought before decisions made)
3-5 Years Tenure + Female	28.2	Y (across 4 of 11 factors)
Thornloe	66.1	N
Up to 3 years tenure	86.8	N
3-5 years tenure	41.1	Y (promotions merit based, ideas sought before decisions made)
Over 5 years tenure	55.6	N
Finance + Male	64.2	Y (against 5 of 11 factors)
Finance + Female	47.5	Y (feedback flows w/o consequences)
Distribution/ Transport + Male	51.7	Y (Promotions merit-based and Ideas sought before decisions)
Distribution/Trans + Female	-0.9	N
R&D Female	13.9	Y (be self w/o consequences and feedback w/o consequences)



## Executive Summary: Recommendations

In the aggregate and across most of the broad demographic categories, XYZ faces none of what we term 'red flags,' where 25% or more of respondents answered a question or rated a category in the negative. Like any organization, however, there is room for improvement. Due to the high response rate to this survey and the large amount of data collected, XYZ now possesses a valuable instrument for precise DEI-related insight into its workforce.

In this report, we share analyses of dozens of variables (where there were at least 5 respondents). Other than the LGBTQ2SIA+ community one or more where red flags arose across each category of DEI, issues arise and 'intersectionalities' of gender, race, LGBTQ2SIA+ identity, disability, and indigenous status. They also appear in specific location and work functions across the categories of DEI surveyed.

**XYZ's survey results and this analysis offer insights and indications for what XYZ might investigate further (through interviews, focus groups, listening sessions, etc.). Further investigation is required to gather context and a more precise understanding before interventions should be designed and executed. The following are suggested priorities for further investigation:**

	0-6 Months	→ 6-18 Months	→ 18-36 Months
1	29 respondents identified as LGBTQ2SIA+ (52 preferred not to say). Willing members of this community should be interviewed and/or participate in 'listening sessions' to obtain qualitative data around context and specific concerns.	Design and implement interventions likely to address the issues raised most efficiently. Devise measures and desired outcomes to gauge the effectiveness of the intervention(s).	Conduct another DEI360 to gauge progress, analyze measures of success and progress. Adjust interventions where necessary and repeat.
2	Investigate significant differences in DEI experience depending on work type and location. R&D, Finance, Sales & Marketing, and Clayson, Davisville, and Cleveland, for example, rate their DEI experience more negatively than overall across several dimensions of DEI.	Design interventions likely to address the issues raised most efficiently. Devise measures and desired outcomes to gauge the effectiveness of the intervention(s).	Conduct another DEI360 to gauge progress, analyze measures of success and progress. Adjust interventions where necessary and repeat.
3	Investigate the various 'intersectionalities' between women, LGBTQ2SIA+, POC, Disability, and Indigenous status.	Design interventions likely to address the issues raised most efficiently. Devise measures and desired outcomes to gauge the effectiveness of the intervention(s).	Conduct another DEI360 to gauge progress, analyze measures of success and progress. Adjust interventions where necessary and repeat.
4	The 104 respondents with 3-5 years tenure rated most factors of inclusion & belonging significantly lower than overall. Consider investigating this tenure group.	Consider investigating specific factors of equity and inclusion that frequently surface across groups, such as consulting workers before decisions are made that impact them.	