

[CLIENT LOGO]

THE STATE OF INCLUSION AT XXXX



Inclusion Assessment conducted by Aleria PBC
[DATE]

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INTRODUCTION

As part of an Inclusion Assessment for XXXX, Aleria held two interactive workshops, one on XXXX and another on XXXX. Collectively, x employees attended these workshops.¹

This report provides an overview of the employees that participated, the representation data that was collected, the experiences of exclusion that were shared and, based on Aleria's analysis, the greatest opportunities to focus resources and drive greater employee satisfaction and overall inclusion across the organization.

¹ For additional information about how the information was gathered and analyzed, refer to Appendix A.

KEY FINDINGS

XXXX employees often feel excluded because of a lack of Respect.

- x% of participants who reported at least one experience of exclusion, cited Respect as a category in which they felt excluded.
- x% of all experiences of exclusion were related to Respect.
- Experiences reported under the category of Respect are often also reported under additional categories. With this in mind, it's key to look beyond this category.
- Other categories² with significant evidence of exclusion include Workplace Interactions and Access & Participation.

XXXX employees attribute most experiences of exclusion to Leadership.

- x% of participants who reported at least one experience of exclusion, cited Leadership as a source of exclusion.
- When looking at experiences of exclusion shared, x% cited Leadership as a source of exclusion.
- After Leadership, x% of experiences cite Direct Managers and x% of experiences cite Peers as a source of exclusion.
- Reports and Customers were cited the least, with less than x% of participants attributing a single experience of exclusion to either.

Satisfaction metrics reveal disparities between part-time and full-time staff, as well as Staff Group 1 and Staff group 2.³

- Part-time staff have a significantly lower sense of satisfaction than full-time staff.
- Staff Group 1 have a significantly lower sense of satisfaction when compared to Staff Group 2.
- In terms of gender, there is a lower sense of satisfaction among those that identify as a woman when compared to those that identify as a man, nonbinary or gender nonconforming.
- Looking at race/ethnicity, those that identify as Black, Hispanic or Latinx or multi-racial report a lower sense of satisfaction than other groups.
- Older employees also report a lower sense of satisfaction on average when compared to younger employees.

² A summary of the findings within each Category can be found on pages 5-7.

³ Find a full breakdown and comparison of satisfaction on page 11.

OVERVIEW OF EXPERIENCES OF EXCLUSION

Below is a summary of the experiences of exclusion shared by XXXX across each of the nine Categories of Inclusion. For each category we look at the percentage of participants that shared at least one experience in each category, as well as the percentage of all experiences that relate to that category. Finally, we provide insight into the most frequently cited Source of exclusion and a few examples of the types of experiences shared within each category.

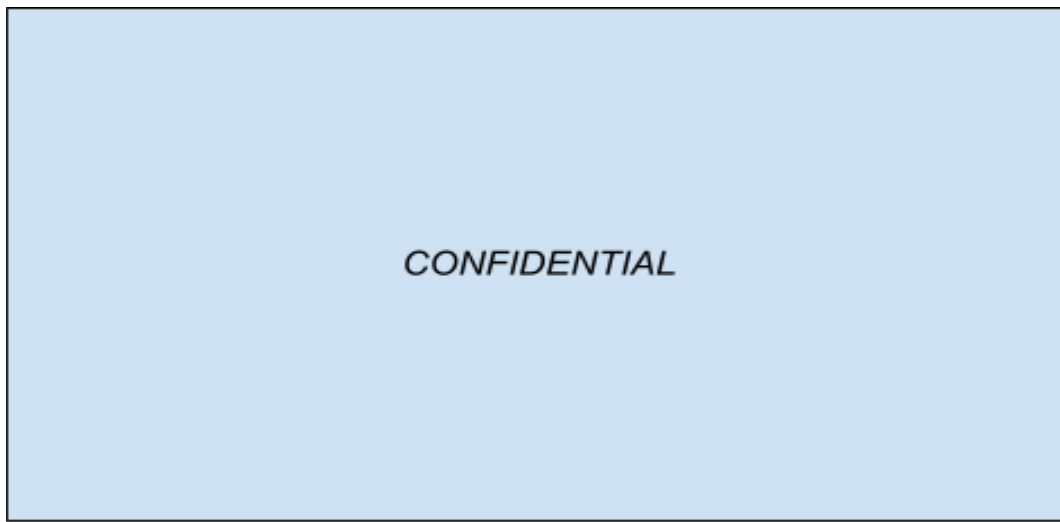


Figure 1: the percentage of employees that shared an experience within each category alongside the percentage of the total experiences that relate to each category

Access & Participation

x% of participants shared an experience of exclusion in the category of Access & Participation with x% of all experiences of exclusion relating to this category.

The majority of experiences of exclusion in this category were attributed to Leadership.

The types of experiences of exclusion shared within this category include being left out of decision-making processes that affect

one's role, not being allowed to participate in trainings and being siloed.

Compensation & Benefits

x% of participants shared an experience of exclusion in the category of Compensation & Benefits with x% of all experiences of exclusion relating to this category.

The majority of experiences of exclusion in this category were attributed to HR, followed by Leadership.

The types of experiences of exclusion shared within this category include a lack of clarity and feelings of unfairness around compensation and access to benefits. In particular, part-time employees expressed these sorts of experiences.

Career Opportunities

x% of participants shared an experience of exclusion in the category of Career Opportunities with x% of all experiences of exclusion relating to this category.

The majority of experiences of exclusion in this category were attributed to Leadership.

The types of experiences of exclusion shared within this category include a lack of clarity around how to grow and move up within the organization along with preferential treatment. Many XXXX employees are interested in growing within the organization but feel there aren't options provided to them and that there is a preference for filling higher level positions with outside candidates.

Learning & Growth

x% of participants shared an experience of exclusion in the category of Learning & Growth with x% of all experiences of exclusion relating to this category.

The majority of experiences of exclusion in this category were attributed to Leadership.

The types of experiences of exclusion shared within this category include inequitable access to training and professional development opportunities. Some employees feel they are not able to

opt in to participate in these and are told about them after the fact.

Recognition

x% of participants shared an experience of exclusion in the category of Recognition with x% of all experiences of exclusion relating to this category.

The majority of experiences of exclusion in this category were attributed to Direct Managers.

The types of experiences of exclusion shared within this category include feeling underappreciated and undervalued for one's contributions. This is particularly high for Staff Group 1 and is exacerbated by the nature of their roles during the COVID-19 pandemic. There were also experiences reported of feeling like one is seen as incapable or less than.

Respect

x% of participants shared an experience of exclusion in the category of Respect with x% of all experiences of exclusion relating to this category.

The majority of experiences of exclusion in this category were attributed to Leadership.

Experiences reported under the category of Respect are often also reported under additional categories. With this in mind, it's key to look beyond this category to better understand what is happening.

Skills Use & Assignments

x% of participants shared an experience of exclusion in the category of Skills Use & Assignments with x% of all experiences of exclusion relating to this category.

The majority of experiences of exclusion in this category were attributed to Leadership.

The types of experiences of exclusion shared within this category include feelings that one's domain knowledge of their role isn't trusted. There are also experiences of having one's ideas being dismissed.

Work-Life Balance

x% of participants shared an experience of exclusion in the category of Work-Life Balance with x% of all experiences of exclusion relating to this category.

The majority of experiences of exclusion in this category were attributed to Leadership.

The types of experiences of exclusion shared within this category include feeling

overworked with not enough flexibility for breaks and rest. There are also a number of experiences describing being asked to work overtime and on days off. Staff Group 1 in particular note these experiences.

Workplace Interactions

x% of participants shared an experience of exclusion in the category of Workplace Interactions with x% of all experiences of exclusion relating to this category.

The majority of experiences of exclusion in this category were attributed to Leadership and Direct Managers.

The types of experiences of exclusion shared within this category include inappropriate jokes, acknowledgment of some staff over others and preferential treatment. There were also reports of microaggressions.

Microaggressions at XXXX

Across all categories, but particularly in the category of Workplace Interactions, employees of XXXX shared examples of microaggressions they've experienced. While these don't necessarily point to the greatest opportunity to drive inclusion within an organization, together they can uncover patterns in behaviors and a potential need for increased awareness or training.

At XXXX we're specifically seeing microaggressions that relate to race, age and, to a lesser extent, religion. Below are a few examples :

- Targeted discussions about Black culture, celebrities or hip hop with Black employees
- Not allowing individuals to self-identify or pushing them into identities such as "Latinx"
- Being called "too white" or "too Black"
- Comments about accents

- Inappropriate jokes in an overly familial culture
- Lack of awareness or acknowledgement of religions other than Christianity

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Figure 2: a heatmap that reflects the number of experiences that are attributed to each category and source

SOURCES OF EXCLUSION

When collecting Experiences of Exclusion, we asked XXXX employees to identify the Source of Exclusion related to that experience. The list of potential sources included:

- Policy
- Leadership
- Direct Manager
- HR
- Peers
- Reports
- Customers

XXXX employees attribute most experiences of exclusion to Leadership, with x% of participants who reported at least one experience of exclusion citing Leadership as a source of exclusion.

Peers and Direct Managers are the next frequently cited sources of exclusion, with the specific order depending on whether you are looking at the percentage of participants who shared an experience that attributed each source or the percentage of the total number of experiences shared.

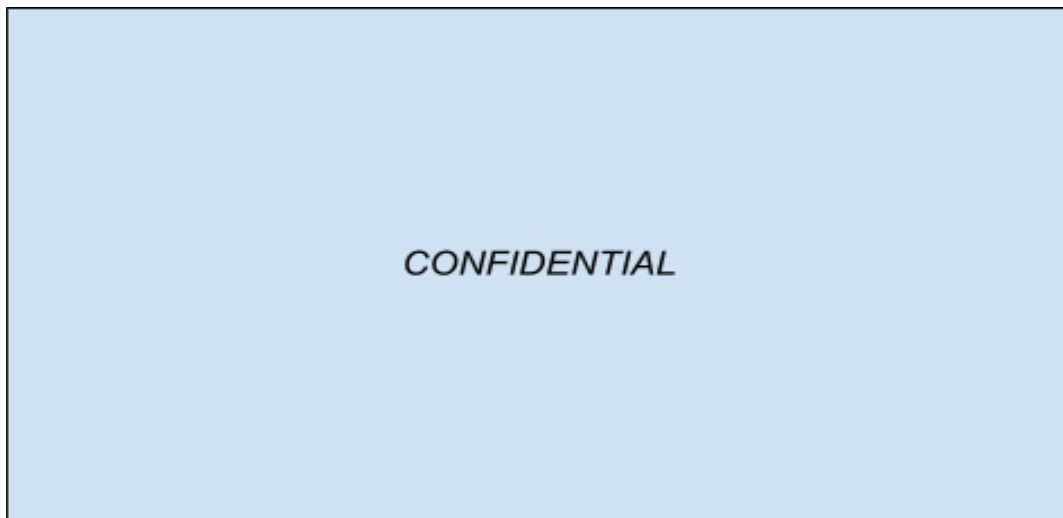


Figure 3: proportion of experiences attributed to each source of exclusion

Recency

During the Inclusion Assessment we also collected Recency data to gain insight into the types of experiences that have occurred in the last month, the last year or those that occurred over a year ago. Of all experiences, x% of the experiences were reported as taking place in the last month, x% took place in the last year and x% reported as taking place over a year ago.

As it relates to the attributed source of exclusion, we saw no significant shifts when comparing each of these time periods.

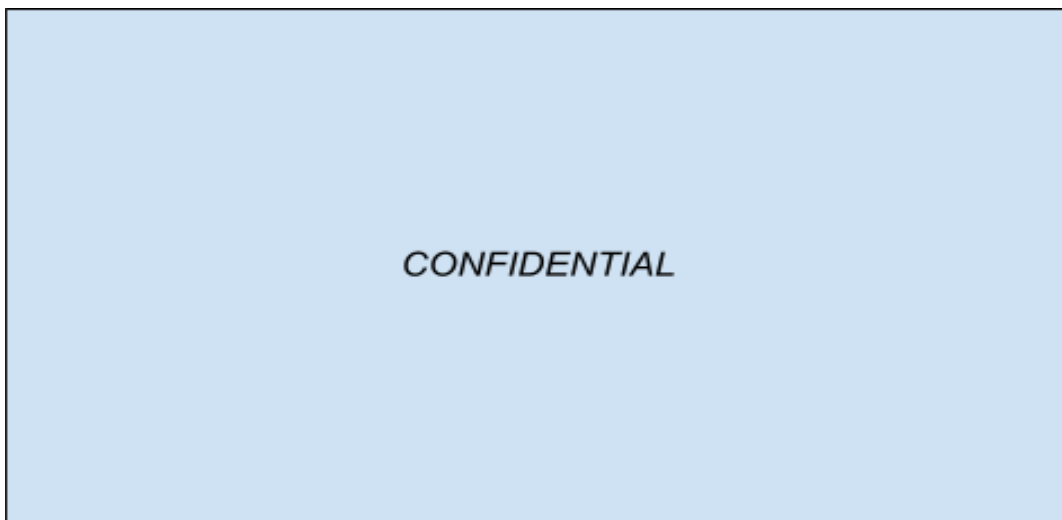


Figure 4: the percentage of experiences attributed to each source, grouped by recency

SATISFACTION

XXXX employees reported their level of satisfaction in the following ways:

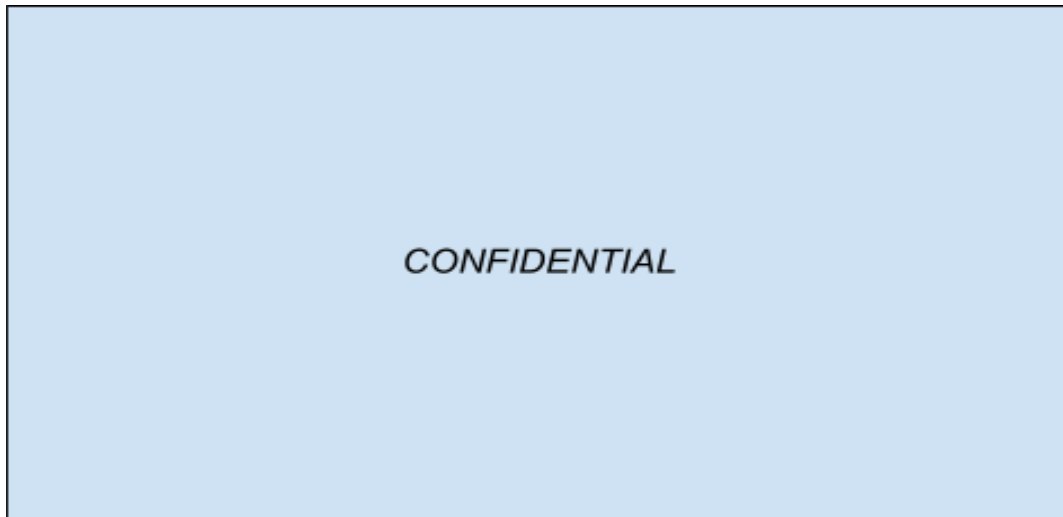


Figure 5: satisfaction level reported across dimensions of diversity

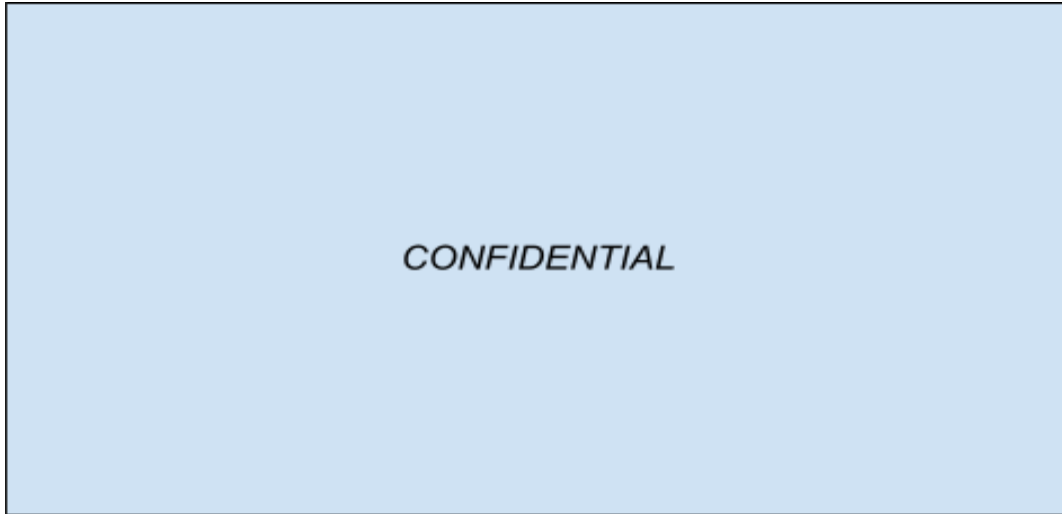


Figure 6: a word cloud of common two-word phrases found in the experiences of exclusion shared by XXXX employees

OPPORTUNITIES FOR IMPACT

We have identified three core areas of focus that XXXX should prioritize to increase inclusion within their organization:

1. Create clear opportunities for growth
2. Dismantle hierarchical culture
3. Foster a culture where each individual feels valued

Each of these areas represent significant sources of exclusion and feelings of dissatisfaction among XXXX employees, and therefore the greatest opportunities for impact. By prioritizing these areas, XXXX can drive greater inclusion at their organization, improving employee satisfaction and engagement, as well as organizational success.

We describe each of the areas of focus below with related examples of experiences of exclusion that were anonymously shared by XXXX employees. Please note that while we do not include witnessed experiences in the overall analysis, we did receive multiple submissions regarding each area from those not directly impacted as well.

Create clear opportunities for growth

There were many experiences of exclusion shared regarding compensation, hiring and promotion practices. In particular, participants expressed perceptions of unfairness and a lack of transparency around how positions are filled, how employees are compensated and access to career opportunities within XXXX. Leadership, Direct Managers and HR were the most frequently cited sources of these experiences, which is understandable considering the nature of who typically manages recruiting and promotions within an organization.

In the chart below we can see that both Staff Group 1 and Staff Group 2 report these experiences but there are differences in which category is most frequently cited between the two groups.

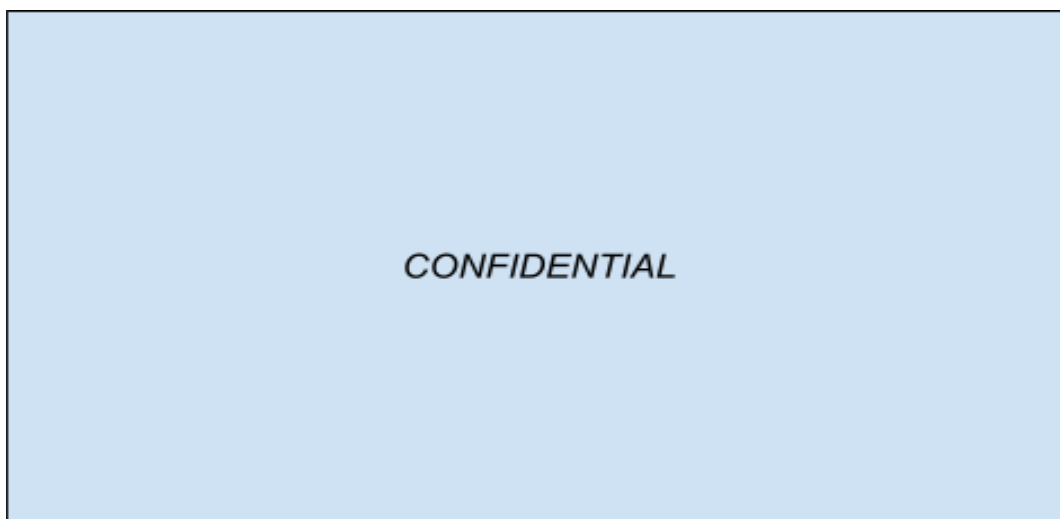


Figure 7: distribution of experiences from Staff Group 1 and Staff Group 2 across Career Opportunities, Compensation and Benefits, and Learning & Growth

With regards to compensation, experiences shared include:

- Not being fairly compensated for additional work responsibilities and overtime work
- Not being paid the same as others in the same role
- Preferential treatment with regards to additional compensation such as gift cards

Some XXXX employees feel their growth is hampered by current promotion, learning and growth systems. Experiences shared include:

- Lack of access to promotions for individuals within the organization looking to move up
- A preference for hiring externally for higher-level positions
- Not having equitable access to or knowledge of learning and growth opportunities that could support moving up within the organization

- Lack of training for Staff Group 1 that supports opportunities for promotion to Staff Group 2
- Preferential treatment with regards to opportunities for advancement and professional development
- Noting that the differences in racial/ethnic makeup between Staff Group 2 and Staff Group 1 are exacerbated by low opportunity to cross the divide

Dismantle hierarchical culture

Going along with some of the insights regarding compensation and career opportunities, the experiences shared by XXXX staff noted an overarching culture of hierarchies and divides that result in multiple forms of exclusion. Employees feel siloed in certain groups with little opportunity to cross lines. Experiences of exclusion within this area were mostly attributed to Direct Managers, Peers, and Leadership. Staff Group 1 and part-time staff are particularly affected by this issue.

Staff Type

When it comes to staff type, the vast majority of experiences of exclusion shared were from Staff Group 1 with x%.



Figure 8: the percentage of experiences of exclusion reported by each Staff Group

They expressed experiences including:

- Not having access to the same trainings and growth opportunities as Staff Group 2
- Being overworked and under-appreciated
- Lack of access to senior leadership

Staff Level

The top categories cited by part-time staff at XXXX related to respect, skills use and assignments, compensation and benefits and workplace interactions.

Experiences of exclusion shared by part-time staff included:

- Being given tasks without explanation
- Not being invited to all staff meetings
- Lack of access to benefits
- Lack of access to growth opportunities
- Being left out of conversations regarding their roles and responsibilities

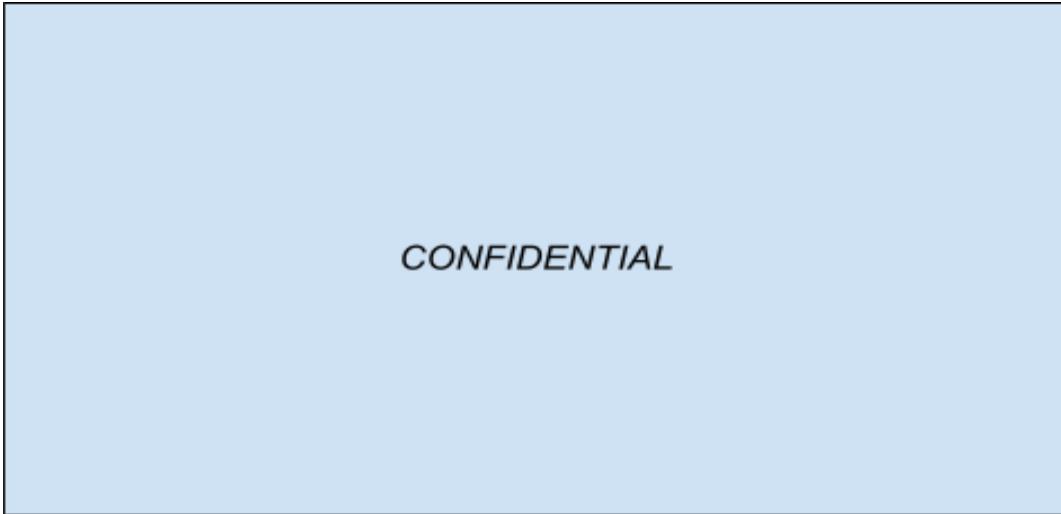


Figure 9: a heatmap that reflects the number of experiences that are attributed to each category and source by part-time employees

Foster a culture where each individual feels valued

Across the board, recognition is a key issue that came up frequently as why participants were feeling excluded and dissatisfied at work. These experiences are causing some folks to feel disincentivized to fully participate at work. We noticed a spike in recognition related issues within the past year.

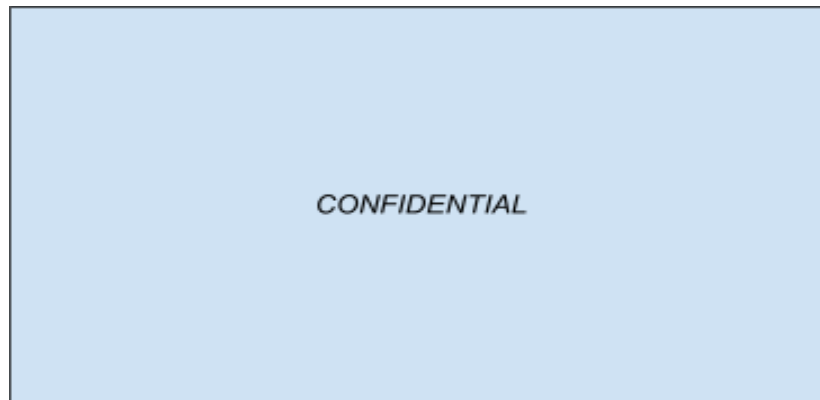


Figure 10: the percent of experiences attributed to recognition broken down by recency

We also noticed that Staff Group 1 in particular cited the majority of recognition-related experiences of exclusion.

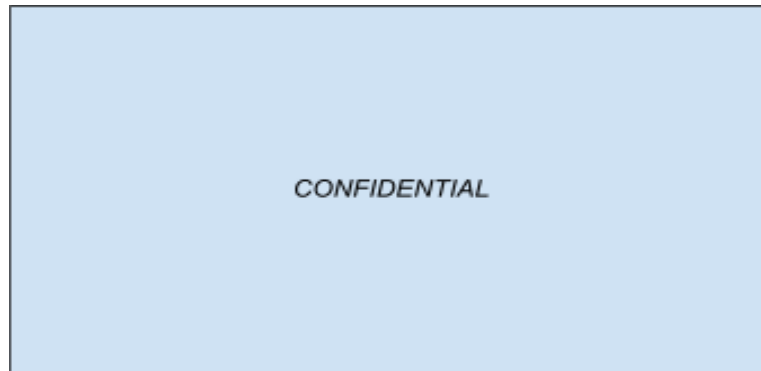


Figure 11: percent of experiences attributed to recognition broken down by recency and staff type

In particular, we see two main themes.

Acknowledgment of work and contributions

XXXX employees noted a lack of recognition for their contributions and frequent dismissal of input and ideas. They included experiences such as:

- Feelings of being viewed as less than, incapable, or “too dumb”
- Being denied the opportunity to try out new ideas or initiatives in the organization
- Disregard for past experiences and skill sets

Decision-making processes and participation

Participants shared experiences of being left out of decision-making processes and meetings related to their role. In particular, experiences included:

- Staff Group 1 feel their domain knowledge isn’t trusted or taken into consideration when making relevant decisions
- Being asked for input or opinions, which are then regularly ignored

The Context of the COVID-19 Pandemic

[Description of how COVID-19 has impacted inclusion at the organization.]

TAKING ACTION

The three areas defined as opportunities for impact provide XXXX with a clear starting point for increasing inclusion at the organization. By prioritizing initiatives in these areas XXXX stands to gain from greater employee engagement and satisfaction. Below are recommendations for how to tackle each of these goals.

Create clear opportunities for growth

- Create pathways for upward advancement within the organization
- Include Staff Group 1 in Staff Group 2 and leadership pipeline
- Conduct a compensation and pay equity audit
- Offer regular training and professional development opportunities to all staff
- Provide clear and transparent criteria for promotion
- Standardize hiring process to reduce bias and ensure all team members are aware of it

Dismantle hierarchical culture

- Establish “reverse mentorship” program
- Create opportunities for cross-functional learning
- Implement a safe feedback system
- Create opportunities for all staff to engage with each other and build relationships not solely defined by role
- Form a leadership sponsorship program

Foster a culture where each individual feels valued

- Establish gratitude and recognition rituals
 - When making decisions, give all affected individuals an opportunity to share their input
 - Support curiosity and empower employees that are interested in trying new ideas
 - Ensure the contributions of Staff Group 1 and Staff Group 2 are valued and recognized equitably and consistently
-

Additional opportunities to drive inclusion

At the end of our data collection phase during the interactive inclusion workshops, we like to close the sessions by asking participants an important question to highlight how each of our actions impacts people's sense of belonging and inclusion: ***what is one thing you can do tomorrow to make someone's day just a little better?***

The participants' answers⁴ are an interesting reflection of the experiences of exclusion they shared just prior. The most commonly referenced inclusion tips shared by XXXX employees can be organized into three of our Categories of Inclusion.



Respect

- Seek to understand each other in conflicts.
- Active listening and intentional dialogue.
- Be open-minded.
- Get to know your colleagues as real people outside of their roles.
- Create space for conversations that deepen relationships and bonds.



Recognition

- Recognize each person's efforts
- Provide genuine compliments.
- Reach out to team members you don't interact with regularly to acknowledge their work.
- Ensure everyone is able to share ideas and input.
- Trust domain knowledge of employees.



Workplace Interactions

- Create a welcoming onboarding process for new staff.
- Invite new staff to lunch and help them feel included.
- Ask others how you can help them
- Regularly check in with each other to ask how they're doing
- Provide reassurance and encouragement to colleagues when needed.
- Foster a culture of support & encouragement

Why are these important?

XXXX employees are the domain experts of their environment. Those who experience exclusion on a day to day basis often have great insight into the changes that need to be made. The recommendations and tips listed above are a good starting point for actions that can be taken at the individual level.

⁴ While we summarize the key takeaways from this exercise, you can find the entire list of employee suggestions in Appendix C.

APPENDIX A: DATA COLLECTION & MEASUREMENT METHODOLOGY

Aleria's Inclusion Assessment utilizes their proprietary framework for measuring inclusion grounded in behavioral sciences and complexity science. As part of the Inclusion Assessment for XXXX, Aleria held two interactive workshops, one on XX and another on XX. This report is specifically based on the two interactive workshops, collectively attended by 202 XXXX employees.

Each workshop introduced key concepts on how to define and measure inclusion, and then conducted an interactive exercise, during which employees could submit examples of Experiences of Exclusion.

For each submitted Experience, participants were asked to select one or more of the Categories of

Experience of Exclusion		
Please describe your experience...	CATEGORIES	+
	SOURCES	+
	HOW RECENT	+
<input type="checkbox"/> Okay to anonymously refer to this experience during the workshop		
SUBMIT »		

Figure 12: A screenshot of Aleria's tool for capturing specific experiences of exclusion from employees

Inclusion and one or more Source of Exclusion. The Categories of Exclusion help to organize experiences into meaningful clusters, such as Career Opportunities, Compensation & Benefits or Respect. The Sources of Exclusion refer to the causes of exclusion experiences, which range from Corporate Policy and Leadership, to Peers and Customers. Together, the quantification of Categories and Sources pinpoints specific opportunities for improvement.

Additionally, each employee was asked to provide demographic information, which allowed us to determine whether any specific segments feel less included than others, as well as an overall sense of satisfaction, which allowed us to confirm correlations between inclusion and satisfaction.

I identify as _____ , _____ and _____ . I am in my _____ and I have _____ disability. I have worked with this organization for _____ year(s), and overall I feel _____ with my job. I am currently in a _____ role and part of the _____ team.

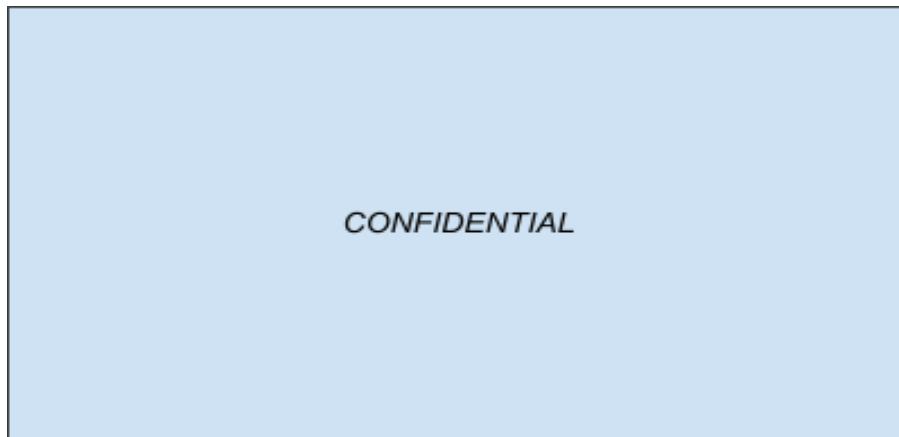
Figure 13: A screenshot of Aleria's tool for capturing demographic and satisfaction data

For the XXXX Inclusion Assessment, we specifically captured the following information as part of the Demographic Madlib, as seen in Figure X.

- Gender Identity
- Sexual Orientation
- Race / Ethnicity
- Age
- Disability
- Years at XXXX
- Satisfaction
- Part Time or Full Time
- Staff Group

APPENDIX B: PARTICIPATION SUMMARY

In total 202 XXXX employees attended the workshops. Of those that attended, 171 employees shared at least some demographic data and 120 employees shared at least one Experience of Exclusion.



All together x Experiences of Exclusion were shared, an average of x experiences per participating employee. Worth noting, x of the Experience of Exclusion were “witnessed” rather than personally experienced by the individual that submitted the experience.

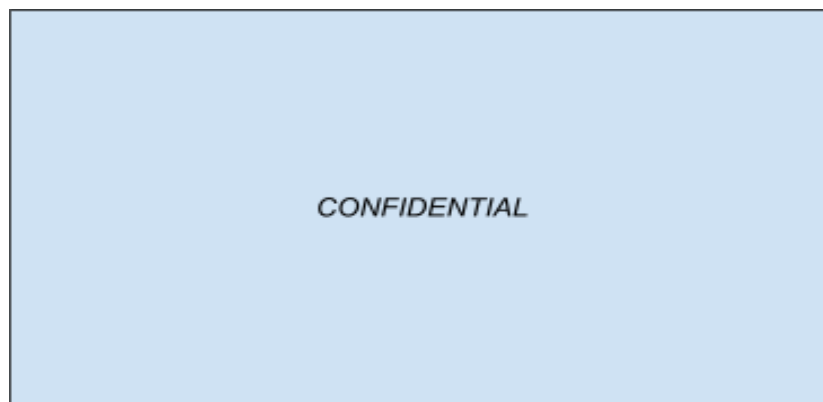


Figure 14: distribution of the number of cards submitted per person

The following group of charts provide a sense of the demographic breakdown of all participants based on the information shared during the workshops.

DEMOGRAPHIC OVERVIEW OF PARTICIPANTS

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APPENDIX C: ABOUT ALERIA PBC

Companies that want to succeed in today's business world know that creating an inclusive culture is a vital step in recruiting and retaining top talent, and enabling them to do their best work. But it's hard to know where to start or focus your efforts. Leveraging a unique methodology, Aleria takes the guesswork out of Diversity & Inclusion by pinpointing specific opportunities to drive inclusion and helping business leaders link their D&I initiatives to key business performance metrics.

For additional information, please contact Lisa Magill (lisa@aleria.tech) or visit our website (<https://aleria.tech>).