

September 2021

# DATA ASSESSMENT

Diversity, equity, and inclusion (DEI) metrics gathered through data assessment should serve three purposes:

1. Diagnose risk areas and opportunities
2. Track the progress of initiatives
3. Demonstrate organizational health and employee well-being improvements through DEI investments

Each organization must define what approach they will take, which data/statistics they will track, and most importantly, why they are collecting each type of data. For example, the data assessment can identify and prioritize where to take action (and thus inform the **Action Plan** development).

## WHO IS CUWA?

Established in 1990, California Urban Water Agencies (CUWA) is a nonprofit corporation of 11 major urban water agencies collectively delivering drinking water to approximately two-thirds of California's population. Water delivered by CUWA's 11 member agencies is a lifeline supporting California's urban populations and powering the bulk of the state's \$3.2 trillion economy. CUWA agencies are committed to addressing systemic racism, promoting equity, and catalyzing change for marginalized communities throughout the water community.

**QUESTIONS:** [cuwa.org/contact-us](https://cuwa.org/contact-us)

## Types:

Data assessment can be performed in a variety of forums including:

- Focus groups
- 1:1 employee interviews
- Union meetings
- Workforce surveys

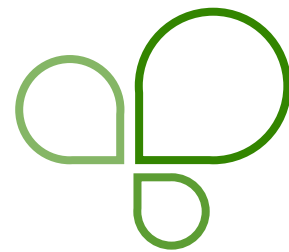
Data assessment can vary from baseline data gathering to a routine (e.g., every 1-2 years) 'full blown' evaluation with an accompanying 'pulse' survey in the meantime. Assessment can be based on a variety of topics including demographic categories, inclusion perspectives, or open-ended questions. Because every organization is on a continuum with its DEI programs, data assessment is a dynamic process requiring regular implementation.

## Demographic Categories:

Below is a list of categories that may be used to analyze an organization's workforce demographics and there may be additional categories an organization deems appropriate. If an organization does not readily have demographic information available that it deems appropriate to analyze and chooses to obtain such information through an employee survey, it is recommended that the organization determine, prior to soliciting such information, that doing so is not in violation of any state or federal employment law.

- Race/ethnicity
- Gender identity
- Sexual orientation
- Tenure (years with organization)
- Role or job group
- Department
- Religious affiliation
- Age
- Veteran status
- Disability status





## Inclusion Perspectives

Consider asking employees to provide their perspectives on a sliding scale and/or asking open ended questions to better understand opportunities for action. Some examples include:

- [Organization] respects individuals and values their differences.
- Diversity and inclusion are important at [Organization]
- I can freely voice a differing opinion without fear of negative consequences.
- My own perspective or opinion is invited and included in decision making.
- I feel respected and valued by my peers.
- Employees of different backgrounds interact well within [Organization].
- My supervisor demonstrates a commitment to, and supports, diversity, equity, and inclusion.
- I prefer to interact with people at work who are like me
- [Organization] is already sufficiently diverse and inclusive

## Open-Ended Questions

- What actions (if any) can be taken to improve the level of DEI at [Organization]?
- Share any feelings/experiences you may have regarding DEI within [Organization]?
- What DEI opportunities exist at [Organization]?
- What DEI message, if any, should [Organization] project to employees and the community?



## Other Considerations:

- Data assessment can be one means of data gathering/validation but should be paired with additional activities, such as employee support groups, to gain additional insight. Determining how to measure impact also helps inform DEI program implementation over the long-term.
- Data gathering may be imperfect as some employees may choose not to answer certain questions (or choose not to respond to the entire survey), and less vocal employees may not speak up in open forums. Consider being transparent by acknowledging this when reporting out on any results of the data assessment.
- Connecting DEI initiatives to the beginning of the fiscal year will help confirm that resources are properly aligned with areas that need attention.

## Reference:

- [East Bay Municipal Utilities District. 2021. Cultural Audit Key Findings Presentation \(see page 61\).](#)

References will be updated on the CUWA website as more information and examples become available.

## Implementation Best Practices:

### Establish a common set of definitions

Standard definitions support understanding.

### Include an outside facilitator or consultant

Having a neutral external perspective assists with data assessment development/implementation.

### Learn from former employees

Former employees can provide additional perspective as they may be more willing to speak on issues because they no longer work for the organization.

### Repeat data assessments over time

Updated assessments help to understand areas of change as DEI programs are implemented.