Assessment Components

Key Stakeholder Interviews (n=33)
Understanding, awareness, challenges, opportunities, and recommendations for company DEI

Intercultural Development Inventory® (n=115)
Cultural Competence, engaging across differences

Review of Existing HR Data
Predictions and forecasting of promotions, terminations, hires, and performance ratings by subgroup

Inclusion Insights Survey (n=1104)
Attitudes, opinions, perceptions of practices and policies around DEI

Employee Focus Groups (n=129)
Understanding and awareness, and recommendations for company DEI

Policies, Practices, Procedures Analysis (7 Policies)
Systematic analysis of inclusive language, systemic barriers, and gaps in existing policy documents
Intercultural Development Inventory®
Methodology

- **Theory-based psychometric instrument**
  measures intercultural competence

- **Based on Developmental Model Intercultural Sensitivity (Bennett, 1986).**

- **Constructivist thinking**
  “fish out of water”

- **Accurate, Unbiased**
  Reliability and validity tested with over 10,000 subjects in a variety of different cultures
IDI Group Profile: Perceived vs. Developmental

**EBMUD Core Team (n=33)**

- **Perceived**:
  - Acceptance: 125.72
- **Developmental**:
  - Minimization: 106.13

**EBMUD Non-Core Team (n=67)**

- **Perceived**:
  - Acceptance: 124.47
- **Developmental**:
  - Minimization: 103.63

**EBMUD SMT (n=15)**

- **Perceived**:
  - Acceptance: 126.71
- **Developmental**:
  - Minimization: 108.79

Orientation Gap:
- EBMUD Core Team: 19.59
- EBMUD Non-Core Team: 20.84
- EBMUD SMT: 17.92

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IDI: Range of Developmental Orientations

EBMUD Core Team (n=33)

EBMUD SMT (n=15)

EBMUD Non-Core Team (n=67)
Monocultural mindset

Denial

What racial problem? I don’t get it! This has nothing to do with me.

Polarization

Reversal: I am so ashamed by my culture. Defense: They are a threat to our way of life!!

Minimization

All lives matter. I don’t see color.

Acceptance

I want to better understand how racism impacts people and our work?

Adaptation

I can see how all systems are exquisitely designed to get the results they are getting. I want to work to dismantle racism.

Intercultural mindset
Understanding Minimization Leading to Acceptance

**Strengths**
- Successful intercultural communication around commonalities
- Values tolerance of cultural differences

**Opportunities**
- Bridging across differences at a deeper level
- Increased self-understanding and awareness of social identities and cultural patterns
Review of Existing HR Data
Key Findings: Race/Ethnicity

POC are being hired at rates significantly higher (55.0%) than their current representation in the EBMUD workforce (48.8%).

White employees are 1.7x more likely to leave EBMUD voluntarily compared to POC.

POC are being promoted at rates (53.2% in 2021) consistent with current representation (55.0%) and is expected to increase over the next five years.
Key Findings: Gender

Five-Year Forecasting Analysis of Hires by Gender for 2022-2026

- **Women have been hired, at rates consistent with their current representation in the QBP HQ workforce. However, this rate has decreased over the past two years.**

- **Women are being promoted (26.5%) and terminated (28.5%) at rates consistent with their representation.**

- **Forecasting suggests there will be a decrease in representation of women and promotions of women over the next five years.**
Key Findings: Race x Gender

Forecasting suggests the overall representation of POC in the EBMUD workforce will increase.

EBMUD terminates white men at a lower rate than their current representation in the workforce (76% vs 81%). White females are terminated at rates higher than their current representation (24% vs 19%).

EBMUD terminates POC women at lower rates than their current representation in the workforce (55.8% vs 63.4%) and hires POC men at higher rates than their current representation.

Forecasting suggests the overall representation of POC in the EBMUD workforce will increase.
Key Findings: Generation

Millennials are receiving the majority of promotions (52.3% in 2020). Millennials are 9.2x more likely to be promoted than a Baby Boomer and 3.8x more likely to be promoted than Generation X.

Baby Boomers are most likely to leave the EBMUD workforce and are most likely to do so voluntarily (27.2x vs Generation X; 22.2x vs Millennials).

Generation X employees are more likely to be discharged from their job (13.5%) compared to Baby Boomers (4.8%) or Millennials (2.2%).
Key Findings: Disability Status

Individuals with disabilities represent a small (5.1%) but consistent portion of the EBMUD workforce.

Reasons for terminations differ greatly between individuals with disabilities and those without. Employees with disabilities are much more likely to be discharged (35.7% vs 4.7%).

Promotions and Hiring has been in line with this level of representation but hiring of those who disclose a disability is predicted to decrease slightly over the next 5 years.

<table>
<thead>
<tr>
<th>Reason for Involuntary Termination (2017-2021)</th>
<th>Has a Disability %</th>
<th>No Disability %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Discharge</td>
<td>35.7%</td>
<td>4.7%</td>
</tr>
<tr>
<td>Release</td>
<td>64.3%</td>
<td>90.6%</td>
</tr>
<tr>
<td>End of Temporary Assignment</td>
<td>0.0%</td>
<td>4.7%</td>
</tr>
<tr>
<td>Total</td>
<td>100%</td>
<td>100%</td>
</tr>
</tbody>
</table>
Key Findings: Veteran Status

Veterans represent a large portion of the EBMUD workforce (34.2%) but size of group has been decreasing over time. Veterans are being hired as a significantly lower rate (2.6% in 2020) than their current representation (31.9%). The proportion of promotions has also been decreasing (47.1% in 2017 – 30.5% in 2021).

Veterans are much more likely to be discharged (25.0% vs 5.8%). For voluntary terminations, non-Veterans are more likely to retire (76.5% vs 53.6%) while Veterans are more likely to resign (42.9% vs 23.1%).

<table>
<thead>
<tr>
<th>Reasons for Involuntary Termination (2017-2021)</th>
<th>Not a Veteran %</th>
<th>Veteran %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Discharge</td>
<td>5.8%</td>
<td>25.0%</td>
</tr>
<tr>
<td>Release</td>
<td>89.6%</td>
<td>75.0%</td>
</tr>
<tr>
<td>End of Temporary Assignment</td>
<td>4.6%</td>
<td>0.0%</td>
</tr>
<tr>
<td>Total</td>
<td>100%</td>
<td>100%</td>
</tr>
</tbody>
</table>
Job Satisfaction: All Employees

Knowledge and Awareness of DEI strongly predicted job satisfaction.

83%
Reported High levels of Overall Job Satisfaction

70%
Perceived Strong Knowledge and Awareness of D&I at EBMUD

67%
Perceived Policies, Procedures, and Practices at EBMUD as Inclusive
Key Findings by Race/Ethnicity

Black Employees had many significantly less favorable ratings across all questions related to perceptions of Knowledge/Awareness of DEI and Inclusive Practices, Policies, and Procedures.

I think District leadership promotes inclusive practices.

Hispanic/Latino: 59%  
Asian: 70%  
Black: 37%  
White: 76%  
Native Hawaiian/Pacific Islander: 80%  
Two or More Races: 61%  
American Indian/Alaska Native: 50%
Key Findings by Race/Ethnicity

I think that employees feel valued and respected for their unique contributions to the District.

- Hispanic/Latino: 50%
- Asian: 61%
- Black: 27%
- White: 65%
- Native Hawaiian/Pacific Islander: 60%
- Two or More Races: 55%
- American Indian/Alaska Native: 75%
Women employees reported many significantly less favorable ratings in two categories:
- Perceived knowledge and awareness of DEI
- Perceived policies, procedures, and practices as inclusive
Lesbian, gay, and bisexual employees had some significantly less favorable ratings across all categories, and a pattern of less favorable ratings across all measures assessed.

Key Findings by Sexual Orientation

I think District leadership promotes inclusive practices.

- Heterosexual: 72%
- LGB: 54%

The District’s culture values and respects cultural differences.

- Heterosexual: 79%
- LGB: 66%

I would recommend the District as a good place to work to family and friends.

- Heterosexual: 93%
- LGB: 81%
Millennials reported more favorable perceptions across all categories, with a few significant differences.

- **I think the District leadership exhibits inclusive behaviors.**
  - 69% Baby Boomers
  - 65% Gen X
  - 75% Millennials

- **I think the District’s programs, events, and services are perceived by diverse communities to be accessible and inclusive.**
  - 70% Baby Boomers
  - 69% Gen X
  - 80% Millennials
Key Findings by Disability Status

There were few consistent patterns across disability status, with a few significant differences.

I think the District hires diverse employees.

- 78% Disability
- 84% No Disability

Based on the definition of diversity given, I think the District is diverse at all levels.

- 66% Disability
- 75% No Disability

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Female employees reported many significantly less favorable ratings in two categories:

- Perceived knowledge and awareness of DEI
- Perceived policies, procedures, and practices as inclusive
Key Findings by Tenure and Level

- Employees with the shortest tenures and between 5-10 years had more positive ratings than those working in the district longer.

- Staff and Lead/Foreman levels have less favorable ratings across all three categories, with multiple significant differences.
If EBMUD could do one thing to enhance D&I, what would it be?

- Policy Changes
- Leadership Decision-making process
- DEI Training and team building
- Communication about DEI
- Hiring and Promotion Process
Employee Focus Groups
Methodology

Deductive Thematic Analysis by Question
Identifying implicit and explicit themes and conclusions

Self-Reported Predictive Factors
Focus groups were separated combination of race, gender, and generation.

Sampling note: We conducted a larger number of Black employee focus groups to ensure that every employee who had participated in “listening sessions” after the murder of George Floyd had an opportunity to participate if they so desired.

<table>
<thead>
<tr>
<th>Employee segment</th>
<th># of groups</th>
<th>Participation</th>
<th>% of groups represented</th>
<th>Approximate population at EBMUD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Black / African American Mixed Gender *</td>
<td>6</td>
<td>47</td>
<td>27.2%</td>
<td>173</td>
</tr>
<tr>
<td>Asian Women</td>
<td>2</td>
<td>14</td>
<td>8.9%</td>
<td>158</td>
</tr>
<tr>
<td>Asian Men **</td>
<td>0</td>
<td>0</td>
<td>0%</td>
<td>226</td>
</tr>
<tr>
<td>Hispanic / Latinx Men</td>
<td>2</td>
<td>10</td>
<td>4.8%</td>
<td>210</td>
</tr>
<tr>
<td>Hispanic / Latinx Women</td>
<td>2</td>
<td>9</td>
<td>20.5%</td>
<td>44</td>
</tr>
<tr>
<td>White Women</td>
<td>2</td>
<td>11</td>
<td>6.2%</td>
<td>178</td>
</tr>
<tr>
<td>White Men</td>
<td>2</td>
<td>9</td>
<td>1.2%</td>
<td>784</td>
</tr>
<tr>
<td>Millennial Mixed Gender</td>
<td>1</td>
<td>5</td>
<td>0.9%</td>
<td>562</td>
</tr>
<tr>
<td>Generation X Mixed Gender</td>
<td>2</td>
<td>13</td>
<td>1.5%</td>
<td>858</td>
</tr>
<tr>
<td>Baby Boomer Mixed Gender</td>
<td>2</td>
<td>11</td>
<td>2.1%</td>
<td>514</td>
</tr>
</tbody>
</table>
Working at EBMUD

Positives

• Meaningful Work
• Collaborative, friendly culture
• Strong sense of community/familial environment
• Workplace flexibility
• Learning and development opportunities
• Affinity Groups

Negatives

• Ingroup/Outgroup dynamics
• POC: pressure to conform and code switch
• Women, Millennials, and POC: sense a culture of retaliation against speaking up about DEI issues
Perceptions of DEI Leadership

Positive perceptions of Executive leadership and board support of DEI
Many mentions of the GMs involvement with affinity groups and BLM statements

Mixed perceptions, awareness, and importance of DEI work across lower levels of leadership
Supportive management across higher ranks, less awareness in lower levels of leadership. Main notions of hostility from white men, Gen X, and Baby Boomers

Wariness and Exhaustion from Black and Latinx employees
Skepticism about whether their feedback would be integrated or that plans will be implemented
Perceptions of DEI Challenges and Opportunities

- Black employees feel a lack of psychological safety on a daily basis, skeptical of and wary of change.

- White men and/or Baby Boomer employees have mixed interest in DEI, often expressing that EBMUD feels like a “family”.

- Women and/or Black employees feel a generally low morale as well as a need to prove their skills and experience.

- Latinx/Hispanic employees feel dehumanized and ostracized and feel DEI efforts are reactionary.

- Continue to engage consultants and external resources.

- Bolster presence and power of affinity groups.

- Continue GM public involvement in DEI initiatives.
Being ______ at EBMUD is...

- Most Experience of Microaggressions, Stereotypes, Tokenization
  - Not Great: Black Employees
  - OK: Latinx Employees, Asian Women
  - Good: White Women
  - Great: White Men Employees, Gen X Millennials, Baby Boomers

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Key Stakeholder Interviews
Deductive Analysis by Question
Identifying implicit and explicit themes and conclusions from key stakeholders

Sentiment Analysis
Interpretation of comments, statements, and descriptions that reveal attitudes and practices regarding racial justice in the workplace.

Priority Analysis
Interpretation of comments to indicate that something, an initiative, solution, product, etc. is critical and should be implemented immediately, or as soon as possible.

Interview Questions
- What are your top 3 organizational challenges right now? What would you say are your top three organizational opportunities?
- In your own words how do you define diversity? Inclusion? Do you see a difference? What is the difference?
- In your own words how would you define equity? Is there a difference between equity and equality?
- How does/can diversity enhance the organizational challenges and opportunities that you identified?
- Based on your experiences with diversity, what aspects have you found the most challenging to navigate?
- What changes in behavior do you expect from leaders and employees as a result of the diversity, equity and inclusion initiative?
- How should the organization’s leaders be held accountable for diversity, equity and inclusion?
- What recommendations do you have for the organization to enhance diversity, equity and inclusion?
Sentiment Analysis

- High levels of awareness of DEI, with varied levels of hopefulness for change
- Low levels of awareness of DEI, with a desire and eagerness to learn and improve
- Low levels awareness of DEI, with a resistance to DEI work

Priority Analysis

- Sustain education on cultural competence and systemic inequities
- Establish long-term and well integrated DEI strategy that is held to high organizational priority
- Create measures of accountability to address institutional biases
- High levels of awareness of DEI, with varied levels of hopefulness for change
- Low levels of awareness of DEI, with a desire and eagerness to learn and improve
- Low levels awareness of DEI, with a resistance to DEI work
Key Themes

Organizational Challenges

• Racial inequities
• Lack of DEI implementation
• Hiring and promotion practices
• Change-resistant workplace culture

Opportunities

• Continue affinity group programs
• Expand internship program
• Increase leadership commitment
• Shift from conversation to implementation
Defining DEI

**Diversity**
- Diversity of thoughts/perspectives
- Differences in demographics and cultural background
- Some confusion

**Equity**
- Moderate to minimal understanding
- Confusion between Equity and Equality
- Providing equal opportunities
- Reference to “three boxes” graphic

**Inclusion**
- Fairness
- Feeling of belonging
- Acting upon diversity
- Confusion and uncertainties around difference between diversity and inclusion

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DEI Challenges and Opportunities

Change-resistant Culture
“Old boys club” culture, differences between field and office culture

Experiences of Harassment and Racism
Unfair promotions, hiring, and microaggressions primarily experienced by Women and BIPOC

Lack of public support for DEI from Leadership
Lack of awareness and some instances of denial of the importance of DEI initiatives

Discomfort talking about DEI topics
From white employees who expressed worries about offending colleagues from other cultures

Innovative Problem Solving
Promoting DEI would bring more perspectives and boost creativity

Build a better connection and reputation with customers and greater community
This would help improve EBMUD’s services

Improve hiring and recruitment systems
Diverse leadership would signal growth paths for diverse employees

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Behavior Change Expectations

**Individual**
- Increase in respect across differences
- Awareness of employees’ workplace experiences

**Interpersonal**
- Reduced biases in day-to-day interactions
- Increased learning opportunities and education around the importance of DEI issues

**Systemic**
- Improved communication around DEI
- Leadership accountability and support of DEI initiatives
Leadership Accountability

- Link DEI goals to leadership performance evaluations
- Establish transparent company-wide feedback mechanisms reporting of DEI measures
- Increase leadership responsibility for implementing DEI discussions to sustainable actions
Stakeholder Recommendations

Move Beyond Talk to Implementation

- Identify clear roles, responsibilities, and accountability measures

Increase support from leadership

- Have leaders engage in and support employees through anonymous feedback mechanisms, affinity groups support, and initiatives beyond the HR function

Increase external DEI initiatives

- Increase involvement with the greater East Bay community

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## The Winters Group Strategic Recommendations

### Create a 5-year DEI Strategy
- Build progress metrics
- Share regular updates
- Acknowledge and act upon especially by marginalized groups
- Clarify roles and responsibilities for DEI

### Build on Leadership Support of DEI
- Increase vocal support by GM, Board, and other leadership
- Show commitment by dedicating resources to DEI

### Invest in DEI Education
- Increase organization-wide understanding of diversity, equity, inclusion.
- Build knowledge around racial equity, gender equity, multicultural inclusion, and other topics.

### Build Management Competency Around DEI
- Train management on methods to integrate DEI
- Build management accountability systems, to ensure consistency around DEI
- Tie DEI to performance metrics
The Winters Group Strategic Recommendations

**Design and implement accountability systems**
- Integrate DEI into day-to-day work
- Increase safety of reporting systems to prevent retaliation
- Implement accountability with real consequences for DEI violations

**Refresh Promotion Processes**
- Take steps to intentionally reduce bias
- Improve equitable access to internal training opportunities
- Build internal promotion pipelines for marginalized communities

**Analyze and Improve Hiring Processes**
- Reduce unnecessary education and testing requirements
- Increase long-term outreach to diverse communities
- Increase access through more paid internship and apprenticeship programs
- Provide support and flexibility for those navigating the hiring process

**Increase Support for Affinity Groups**
- Increase funding and paid work hours to organize groups and events
- Build a transparent process to start new affinity groups and encourage participation

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Questions?

Thank you!