Diversity Is Who We Are. Inclusion Is What We Do: Creating a Blueprint to Become a More Inclusive Organization

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Diversity is who we are. Inclusion is what we do: Creating a Blueprint to become a more Inclusive Organization

Doctor of Education Leadership (Ed.L.D.)
Capstone

Submitted by

Alison Louise Harris Welcher

To the Harvard Graduate School of Education
in partial fulfillment of the requirements for the degree of Doctor of Education Leadership.

April 19, 2019
Dedication

“Bringing the gifts that my ancestors gave, I am the dream and the hope of the slave.
I rise. I rise. I rise.”
~ Maya Angelou

I dedicate my Capstone to my ancestors for whom the thought of receiving a formal education was denied to them. And, in spite of that, they have passed down intangible gifts that run deep in my soul and have shaped me to be the woman that I am today. In loving memory of Howard and Rachel Hyde, Charlie Harris, and Annie Mondrey.

I stand on the shoulders of giants.
Acknowledgements

To my loving parents, Lonnie and Mary Harris, who were my first models of leadership for their vision setting for our family and my future. Thank you for always supporting my dreams no matter the sacrifice and cost.

To my grandmother, Louise Mondrey Harris, my first teacher for whom I looked up to for her commitment and dedication to education informally and formally. I have learned that it is never too late to pursue your passion.

To my husband, Hannie Welcher, my partner in life and love. I am forever grateful for your sacrifices, support, and love on this journey.

Thank you to Ed.L.D. Cohort 7 for supporting me and challenging me to grow. It has been an honor to be amongst a group of phenomenal leaders for the past three years. I am especially grateful to my pod, Joiselle Cunningham, Lyndsay Pinkus, and Shirley Vargas for helping me reveal parts of myself in service of becoming a better friend and leader. Thank you to the Queens of C7, Jessica Boston Davis, Cheryl Camacho, Joiselle Cunningham, Angela Jackson, Mel Tavares, Shirley Vargas, and Crystal Ward for your strength and authenticity - it has been an inspiration to me and has forever influenced my leadership and life. Thank you, Jessica Boston Davis and Christine Danhke, for your prayers and friendship.

Thank you to my defense committee, Dr. Elizabeth City, Dr. Ebony Bridwell-Mitchell, and Susan Bodary for your wisdom, care and belief in my potential. I admire each of you and have officially claimed you as a part of my personal board of directors.

Thank you to Tandra Taylor, Amanda Thornton, and Renee Rhinehart for your thought partnership, scholarly feedback and critiques. Your support helped me to refine and produce a quality product that I am proud of.

Thank you to my Education First colleagues for welcoming me with open arms and partnering with me as the firm embarked on a significant operational and cultural change. I am particularly grateful for Dr. Sarah McLean for your bold leadership, Rashidah Lopez Morgan for your wisdom and guidance, Dr. Anthony King for your listening ear and insight, and Irina Cortez for your partnership and sisterhood.

Thank you to all of the educators who have impacted my life from my K-12 education in Winston-Salem/ Forsyth County Schools (NC) to my post-secondary education at Spelman College, Stanford University, and Harvard Graduate School of Education. My lived experience as a student planted the seed to explore education inequity. And, thank you to the scholars, families and educators of Charlotte-Mecklenburg Schools (NC), who serve as my inspiration to continue my lifelong commitment to improving education for all students.
Abstract

Education First (Ed First) is a mission-driven professional services firm dedicated to improving outcomes for all students - particularly low-income students and students of color - through delivering high-quality solutions and ideas to its clients. As the firm seeks to achieve this impact in the field, it recognizes the importance of growing the staff and organizational capacity to increase diversity, equity, and inclusion at all levels of the firm.

This capstone outlines my strategic project to lead an inclusive process, gathering diverse perspectives, to create a more equitable and inclusive operating model for the firm. In addition to leading this inclusive process, I also sought to examine how conditions under a time-bound engagement might translate to ongoing systems and structures to create a more inclusive culture at Education First.

As many education organizations explore how to achieve educational equity, there is a rising commitment within those organizations to become more diverse, equitable and inclusive themselves. Our experience may be useful for other education organizations who have a stated commitment for educational equity and are seeking to improve their organization’s capacity in order to deliver on this mission.

Key words: diversity and inclusion management, equity, inclusion, organizational culture, organizational theory
Introduction

Education First Background and Context

Education First (Ed First) is a “for-profit professional services firm with a not-for-profit soul” (“Our Mission and Vision,” n.d.). Founded in 2006 by Jenn Vranek as a virtual firm, Ed First is committed to “deliver[ing] exceptional ideas, experience-based solutions and results so all students – and particularly low-income students and students of color – are prepared for success in college, career and life” (“Our Mission and Vision,” n.d.). Ed First serves clients across the education sector, including but not limited to, states, districts, charter management organizations, nonprofits, and foundations within three key focus areas: Effective Organization and Investments (EOI), Engaged Students (ES), and Outstanding Educators (OE).

In November 2018, the firm conducted its first comprehensive demographics survey in its 12-year history. This survey collected data on several dimensions of diversity including race/ethnicity, sexual orientation, age, and gender. A total of 51 Ed Firsters completed the survey out of 60 staff members. As of 2018, the firm has grown from a three-person consulting start-up to an almost 60-person professional services firm, with recent hiring efforts leading to more racial/ethnic diversity in the firm. As shown in the figure below, there has been significant growth in the number of staff who identify as people of color and LGBTQ. Specifically, at the time of the survey 48% (24) of staff identified as a
person of color up from 4 people in 2013. Currently, 38% of senior leadership (Partners, Principals, & Chiefs) are people of color. The majority of people of color were hired within the last five years. While the majority of Ed Firsters describe their sexual orientation as “straight/ heterosexual,” 16% of Ed Firsters describe their sexual orientation as “bisexual”, “gay or lesbian”, or “prefer to self-describe”. Over half of these individuals indicated that they were hired in the last five years. The most recent hires, staff with a tenure less than one year at the time of the survey, show evidence of strong diversity efforts at the firm with 50% identify as people of color and 21% identify as bi-sexual, gay or lesbian.

Figure 1: Comparison of number of staff who identify as People of Color or LGBTQ in pre-2013 vs 2018

1 Historical data is being reported using raw numbers because it is being derived from current employees, not all employees who worked at the firm in 2013. Additionally, I do not have access to the demographic data of Ed First employees from 2013.
As the firm has grown in size and diversity, it has recognized the need to maintain its vibrant culture and to make intentional efforts to ensure the culture is one that is inclusive to all team members at Ed First, who are affectionately called, Ed Firsters. While the firm prioritized and committed to intentionally diversifying its team beginning in 2013, in 2015, the firm made a commitment to begin examining how issues of race, inclusion, diversity and equity functioned within its own organization to better support its clients. By the end of 2016, the firm adopted the RIDE (race, inclusion, diversity, and equity) Plan with a collective rationale and six objectives. Figure 2 illustrates the firm’s journey since 2016 to move beyond diversity and to formally address issues of RIDE organizationally. Further, Ed First adopted and published a commitment to “look closely at ourselves—both as individuals and as an organization—to ensure that we are doing everything we can to dismantle systemic inequities” (“Our Equity Commitment,” n.d.).

Figure 2: Ed First’s RIDE Journey 2016 - 2018
In 2018, the firm set out to design the Firm of the Future by first examining its existing operating model - structures, processes, and people - and redesign and refine elements in order to create more alignment with its mission while also creating a more inclusive culture to support team members to be able to deliver on the mission. As noted in the Education First Blueprint 2018 - 2020, the firm’s three-year strategic plan, the firm seeks to create an organization that “embed[s] RIDE principles and practices in a coherent way within human capital practices, business development, thought leadership and project methodology” so that the firm will “operate in a way that contributes to racial justice, promotes inclusion, embraces diversity and integrates equity in the world” (Education First Blueprint 2018-2020, January 2018, slide 27).

In developing the Firm of the Future, the firm also considered its decision-making structure. The decisions at the firm are ultimately made by the Partners, who have the final vote on decisions that affect resource allocation or firmwide policy. In 2018, Partners adopted the Equity by Design (ExD) Decision-Making Framework to engage in more inclusive decision-making, which came out of the ExD workgroup commissioned from February 2018 to May 2018. As shown in Figure 3, the ExD Decision-Making Framework provides guidance for how the firm might address a problem and strategically engage individuals throughout the firm to inform decisions.
Figure 3: ExD Decision-Making Framework

We have developed a simple framework to describe four variations on equity/decision processes:

<table>
<thead>
<tr>
<th>Design without Users</th>
<th>User-Centered Design</th>
<th>Co-Design</th>
<th>User-Created Design</th>
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<tbody>
<tr>
<td>Designers consulted</td>
<td>Stakeholders consulted more</td>
<td>Stakeholders part of design team</td>
<td>Stakeholders as designers</td>
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<td>The idea that someone who is not a user can design solutions that are appropriate (i.e., will solve/address user’s problem) and accurate (i.e., will carry a low risk of failure in implementation), without engaging with end users, but using a design process</td>
<td>Innovation is occasioned by watching/observing people, and then designing something on their behalf, thus putting the designer in charge</td>
<td>The idea that understanding of a problem and/or solution can be improved if designers, suppliers and consumers look at it together</td>
<td>Process in which designers guide people through the process of describing and solving problems for themselves, thus putting the user in charge</td>
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Setting the Stage for the Strategic Project

Within the 2018-2020 Ed First Blueprint, the firm announced its guiding objectives to drive the work to be accomplished during this time period. Of the five guiding objectives, three guiding objectives from the Blueprint (See Appendix A) guided my strategic project:

- Strengthen our vibrant, inclusive, people-centric culture, so that our high-quality relationships flourish, and our values thrive and
- Promote equity in public education and in our daily work firmwide by increasing our competence in issues of race, inclusion, diversity and equity (RIDE) and
- Systematize processes and structures so that we have a mature and sustainable governance, management and growth strategy.

Under the leadership of Rashidah Lopez Morgan, Principal, and Dr. Anthony King, Director of Strategic Leadership and Inclusion, the RIDE Learning Agenda was formally launched in the Fall of 2017 to support staff in building knowledge and skills to translate into behavioral changes. Additionally, the RIDE Learning Agenda was designed to help build the organization’s capacity to operate in a diverse, inclusive, and equitable way. One of the first components of the RIDE Agenda was to establish definitions for equity, inclusion, diversity and other key terms.
Particularly, the firm adopted the following definition of inclusion, stating “[Inclusion is] more than simply diversity and numerical representation; bringing together and including these diverse forces in a way that fosters authentic and empowered participation through a true sense of belonging” (August Ed First Connections Call, 2017). Dr. King’s work in particular created opportunities for staff to build capacity to discuss issues of race, inclusion, diversity and equity as well as to address systems in the firm that challenged these values. Individually, staff have participated in a series of optional and required professional development to “advance the firm climate where staff gained knowledge, acquired skills and adopted behaviors that led to more equitable interactions on project teams and work with clients” (King, 2018, p. 12). Organizationally, Dr. King led the revision of two pieces of Project Methodology (Project Meth), a protocol for how staff carry out their projects from the time that the project is sold to the time that the project is delivered to the client, so that consulting team members had more equitable experiences and experienced more inclusion while working on project teams and engaging with their clients.

In Dr. King’s capstone, “Salting the Oats: Increasing the Likelihood of Organizational Change for Equity,” he proposes, “while I believe it is important to address their own biases and cognitive barriers for mindset shifting, I also believe it is necessary for an organization that wants to promote an equity mindset to create the conditions that increase the likeliness of this mindset shift to permeate the organization and have staying power” (King, 2018, p. 6). Dr. King’s analogy of “salting the oats” was to indicate that you have to build demand and make people
thirsty implicitly through the “salt” and explicitly through systemic processes and structure to support staff to live out the RIDE agenda. For instance, the recent addition of “bias” and “inclusion” as competencies for the staff annual review process is a structure that will now require all staff to self-reflect on these two critical elements and receive annual feedback on these behaviors, forcing staff to more deeply understand how these two elements impact their day to day work.

In the spring of 2018 from February - July, 15 Ed Firsters worked with Dr. Christine Ortiz, Founder of Equity Meets Design, to form an Equity by Design (ExD) workgroup. This group was convened to “deeply consider the problems to be solved and use [an] equitable design process to build aspects of the ‘firm of the future’” (July 2018 ASC, slide 16). Under the leadership of Dr. Ortiz, and Dr. Sarah McLean, Chief Operating Officer, this process introduced the firm to a different way of solving problems so that those closest to the problem could be in a position to help provide solutions to the problem. In reflecting on the ExD work, Susan Bodary, Managing Partner, noted that the overall sentiment was that it was “great for the company because it elevated pain points for the firm, particularly related to staff retention and staff feeling valued” (personal communication, July 2018). When the ExD process concluded in July 2018, there was clear indication that more work needed to be done to address the pain points. As illustrated in Figure 4, some of these pain points included lack of inclusion within project teams and equity across the firm.
My strategic project sought to address the pain points that were revealed in the ExD process and to expand the notion of inclusivity beyond individual learning and interpersonal interactions on project teams. Further, I sought to build on Dr. King’s implication to “help the organization develop and reconstruct systemic process and practices that would increase the likelihood of the spirit of the RIDE agenda to actually live out in the way people engage in their work every day” (King, 2018, p. 7).

As the firm sought to achieve key objectives from the Blueprint 2018-2020 that were relevant to culture and inclusion, the ExD process, combined with firm analytics on resource allocation, profitability, professional growth and culture, led
Partners to the conclusion that the current organizational structure and operating model, as shown in Figure 5, needed to be examined and re-designed. To accomplish the re-design of the firm’s operating model, the firm’s leaders leveraged the concept of the ExD Decision-Making Framework and deemed it important to garner diverse perspectives from across the firm and embed those perspectives into the design process to ensure that the re-designed operating model met the needs of both the firm and the individuals. As a result, I designed and facilitated a staff engagement process with the purpose of gathering perspectives from all staff that would inform the operating model redesign. It was of particular importance to gather perspectives from staff on the margins as defined by individuals who do not possess power or privilege based on their role type, race/ethnicity, and/or sexual orientation, for example. The firm’s leaders believed that if an inclusive process could be used to gather diverse perspectives, then their voices would be heard and would influence the design to become more inclusive and equitable.
This capstone chronicles my journey to support Ed First to become a more inclusive organization through the process of gathering the perspectives of diverse voices to inform the redesign of the firm’s operating model with a focus on key dimensions impacting how both consulting team members experience the firm while working on client-facing work and how internal and consulting team members (when not doing client work) experience the internal operations of the firm. As shown in Figure 6, an initial concept of the key dimensions to be redesigned included elements such as Hiring and Staffing and Culture.
### Figure 6: Key Dimensions of the Operating Model to be Redesigned

<table>
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<th>Key dimension</th>
<th>Details</th>
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<tr>
<td>How you are staffed</td>
<td><strong>Hiring and Staffing:</strong> Home team assignments; staffing assignments in alignment with Staffing 2.0; capacity planning, recruitment, hiring and onboarding</td>
</tr>
<tr>
<td>How you deliver</td>
<td><strong>Project Delivery Expectations &amp; Experience:</strong> Expectations for consistent implementation of project methods across home teams, including the enhanced expectations for building an inclusive, strong team experience</td>
</tr>
<tr>
<td>How you develop, advance</td>
<td><strong>Develop, Advance, &amp; Manage Performance:</strong> Processes for setting clear and specific performance expectations for each staff member and providing regular feedback and formal evaluations relative to those goals, in pursuit of the larger firm’s goals and mission</td>
</tr>
<tr>
<td>How you experience culture day-to-day</td>
<td><strong>Culture:</strong> Creating a sense of belonging within home teams and firmwide</td>
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While I considered focusing on how the restructuring of an organization might help the firm to achieve more inclusion, I decided that the focus would be too limiting as the topic of organizational inclusion is far deeper than structural changes. I decided to focus on how an inclusive process could serve as a way to learn about how an organization can become more inclusive overall. I predicted that the process of including diverse perspectives would inform how the organization would understand key shifts in structures, systems, processes and resources in order to become more inclusive.

Education First has made many strides on the RIDE journey. Dr. King’s work helped to operationalize the RIDE Agenda across the firm through individual and organizational commitments, while the ExD workgroup sought to better understand the day-to-day lived experiences of Ed Firsters in an effort to design a better talent
development system. These precursor activities have set the stage for the work I led to engage staff in a four-month-long design process to redesign the firm’s operating model to become the Firm of the Future.
Review of Knowledge for Action

Three primary research areas informed my work: diversity and inclusion management, organizational theory, and organizational culture. These three areas organize my thinking about the internal change within Ed First to better accommodate the needs of its clients and deepen its commitment to its mission. Taken together, the three bodies of research form a framework for critical examination of my central question: How did a time-bound inclusive process provide the firm with insight on the demands, commitments and behaviors associated with creating a more inclusive culture? Moreover, how does Education First continue to grow in size and impact in the field while creating a more inclusive culture for all team members to do their best work? As Ed First continues to grow, answering these questions have implications for how leadership is prepared for this cultural shift and how decision-making is distributed throughout the firm.

Diversity and Inclusion Management

In 1996, Milliken and Martins’s study of diversity management research concluded that “as organizations increasingly operate in a multinational and multicultural context, understanding diversity will be of increasing importance” (Milliken & Martins, 1996, p. 402). Milliken and Martins’s assertion was exact. Twenty years later, it is impossible to look at the organizational change at Ed First without examining the relation between the firm’s diversity and its operational outcomes within its own walls.
DEI is a common acronym used across almost all sectors to represent the work an organization does related to diversity, equity and inclusion. As the nation’s workforce becomes more diverse, organizations are faced with the challenge of creating environments where all employees can do their best work, paying close attention to not create additional disadvantages for those who are already members of marginalized communities and identities. As organizations have become more diverse in terms of race/ethnicity, sexual orientation, and gender, for instance, organizations have begun to pay a great deal of attention to the concept of DEI beyond the legal imperatives that prevent acts of discrimination. A 2014 study from Deloitte suggests that “promoting diversity is an expected commitment; like workforce safety, it’s now a ticket to play” (Bourke, Smith, Stockton, & Wakefield). Milliken and Martins’s review of research suggests a lack of diversity has negative consequences, ranging from individual to group, from short-term to long-term (Milliken and Martins, 1996, 414-418). And, while increasing diversity is a start, if an organization is not leveraging diversity, there is a missed opportunity. As noted in the Inclusion Breakthrough, “an organizational culture that leverages diversity and builds inclusion is essential for achieving and sustaining higher performance” (Miller and Katz, 2002, 6). When individuals who represent diverse identities join organizations that have not taken the responsibility to create more inclusive environments, not only are there missed organizational opportunities, but there are also individual performance concerns that can arise such as work-related friction,
perceived discrimination, and lack of communication, all of which can lead to absenteeism, turnover, and declined performance.

In 2001, over 75% of Fortune 1000 companies reported having instituted some sort of diversity programing often led by chief executives who hold the title of Chief Diversity Officer (Daniels, 2001). In fact, one in five Fortune 1000 companies have these roles in their C-suite or within their organization at some level (“Top Diversity Leaders”, n.d.). These individuals lead programming that includes diversity recruitment efforts, diversity training and the overall DEI strategy. While some organizations have come to place an emphasis on diversity by way of high-profile incidents or crisis, others have initiated this focus as a moral and organizational viability focus. Regardless of how organizations have come to this focus, each have taken the first step to acknowledging their changing demographics and have set out to take action. But to what end?

This is where the rest of the acronym comes into play. Inclusion and equity can be byproducts of a focus on diversity, but it is certainly not a given. Creating more inclusive and equitable environments for all employees requires a commitment to not only addressing who is working and leading at an organization, but also addressing the structures, policies, and culture of the organization - essentially how systems influence people working in the organization and how people interact with each other. Organizations that simply diversify staff run the risk of creating environments that require assimilation into the dominant culture, which is often white, cisgender, Christian and heterosexual, or at worst create a hostile work
environment for those who do not identify with the identities in the dominant culture. When employees from non-majority identities are forced to assimilate or silence themselves, the impact can be detrimental to both employee and organizational performance. For instance, monocultural environments tend to, “discourage people from suggesting changes” leading to the maintenance of the status quo (Miller and Katz, 2002, 11). Thus, in educational organizations, this may likely negatively impact the end goal of improving outcomes for students. Conversely, research has shown the positive impact of same-race teachers for black students and black boys in particular. In the study, “The Long-Run Impacts of Same-Race Teachers” there is evidence that black elementary school students who have a black teacher are likely to experience more positive teacher perceptions as well as increased standardized test scores (Gershenson, Hart, Hyman, Lindsay, & Papageorge, 2018). Further, in educational organizations where the employee demographic does not often match the student demographic, cultural issues can be exasperated causing a negative impact on the “customer,” which in education is the student, their families and at times, the community.

In recent years, there has been a proliferation of research and general discourse on diversity and inclusion across organizations, which is relevant for both for-profit and non-profit spaces. In both, organizations are concerned with the impact of diversity and inclusion initiatives. While the value proposition for DEI in a for-profit entity often centers around increased profitably, non-profits, particularly those serving people of color, members of the LGBTQ community, individuals from
low-income communities and any other marginalized groups pose a value proposition that speaks to being able meet the needs of the individuals and communities that they are serving in an authentic way.

Another critical theme in the discourse is the interchangeability and obscurity of the terms. Despite the growing popularity of some organizations’ commitment to diversity, there continues to be varying understandings of the distinctions between diversity and inclusion. The confusion of the terms is so prevalent that diversity and inclusion expert Professor Quinetta Roberson led a series of qualitative studies investigating how individuals defined these terms and produced the results in a piece entitled, “Disentangling the meanings of diversity and inclusion in organizations” (2006). Overwhelmingly, Roberson’s studies revealed that there are in fact distinct definitions for “diversity” and “inclusion,” despite the fact that organizations oftentimes use the terms interchangeably. Based on her research, she suggests the following definitions:

- **Diversity** - “focused primarily on heterogeneity and the demographic composition of groups or organizations” (Roberson, 227 - 228)
- **Inclusion** - “focused on employee involvement and the integration of diversity into organizational systems and processes” (Roberson, 228)

Simply put, the term “diversity” is widely understood to represent the degree to which a group or organization has members of various identities. Those identities can include both observable (race, gender, etc.) and non-observable (religion, sexual orientation, etc.) characteristics. An easy way to understand inclusion is to understand to what extent individuals in the organization feel safe, seen, and
celebrated. In summary, “diversity is what we are, and inclusion is what we do” (Equity, Inclusion, & Diversity Vocab, n.d.).

In 2016, Promise54, an organization that is committed to “building environments where adults thrive so that they can do their best work for students …” (“Our Services”, 2017) produced a ground-breaking report that studied the state of diversity, equity, and inclusion across organizations in the education sector. The report, Unrealized Impact, collected data from schools, nonprofits and other types of organizations that are connected to K-12 education “to deepen our understanding of the racial/ethnic diversity of the education workforce; the diversity, equity, and inclusion policies and practices that leaders have put into place; and the effectiveness of these practices (“Unrealized Impact,” n.d.).

While “diversity” and “inclusion” can both be difficult to execute on, the sheer nature of being able to quantify diversity through observation or self-reporting makes it a much easier concept for organizations to place an emphasis on, monitor, and achieve. For instance, as noted earlier, Ed First has made strides to increase the racial/ethnic diversity of its staff. It is a metric that is ever-present and does not necessarily require any additional investigation. However, the qualitative nature of inclusion does not offer such an easy solution. Inclusion is marked by a set of inputs based on one’s ability to be empathetic and aware of the experiences of others with the hopes that the output is that people feel more connected, heard and valued in an organization. As noted in the article, “Diversity Doesn’t Stick without Inclusion,” “It’s easy to measure diversity: It’s a simple matter of headcount.
But quantifying feelings of inclusion can be dicey. Understanding that narrative along with the numbers is what really draws the picture for companies” (Sherbin and Rashid, 2017, p.2).

The act of increasing the percentage of employees who represent a specific identity group is concrete and is a step toward becoming a more inclusive organization. And yet, achieving diversity goals alone will not fully ensure the creation of an inclusive organization. Inclusion, on the other hand, is a concept that must be embedded into the very culture of the organization including but not limited to beliefs and values, which get played out in structures and policies.

Organizational Theory

Open system elements reflect the ties organizations have to their external environments through stakeholder relationships, resource dependencies, and broader cultural influences in communities, regions, and the broader society. Natural system elements reflect the imprint of human behavior, mindsets and attitudes, including various social dynamics, which influence how organizations grow, adapt and change. Rational system elements reflect the fundamental design choices of an organization, which enable (or constrain) it from achieving a set of intended outcomes with a given set of coordinated actions (Scott and Davis, 2016, p. 35).

It is rational system elements, or how an organization is designed, which provide the architecture for an organization’s structures, process and practices. In
other words, an organization’s operating model provides systems and structures that help the organization to achieve maximum efficiency and productivity.

Change is difficult in any organization and can present a number of challenges, including employee resistance to individual behavior change. In order for any change initiative to reach its stated goal or purpose, the change process must be managed carefully. From a rational system perspective, organizations are instruments designed to attain specific goals (Scott, p. 29). To fully consider how structures, processes and practices at Ed First might be further developed to encourage and reinforce RIDE principles, specifically the enhancement of an inclusive culture, it is useful to understand the basic dynamics of goal setting theory.

At the core of the rational system perspective is a principle that is likely familiar to many educators as it was to me in my former role as a school leader. I often reminded my teachers that “If you don’t have a plan for your students, they will have a plan for you.” What I meant by this statement is that without a set of clear goals and executed actions for student learning on a daily basis, there would be an outcome in the classroom that likely did not align to the overall mission and goal of what we were trying to achieve as a school to increase student achievement. This is not because students are inherently trying to not meet the stated mission and goals of school and learn, but rather, their motivations and attitudes are often different from that of a teacher who possesses both the authority
and is held accountable for achieving the mission of the school in their classroom. From a rational systems perspective, the same theory applies.

Goal specificity refers to the degree to which a goal has been clearly defined with indicators of the intended outcome at the forefront along with clarity of the resources needed to accomplish the goal, the tasks that need to be executed and how long those tasks will take. The greater the goal specificity the clearer the strategy to achieve the end outcome. To the extent that there is goal specificity, an organization can make confident choices about the resources (human, political, social or economic) needed to accomplish the goal. While vague goals can morph into more specific goals over time, oftentimes “the structures that are likely to be unstable and amorphous” can lead to wasted resources (Scott & Davis, 2016, p. 37). As a result, this can lead to frustration and a lack of buy-in during execution.

The human mindsets, behaviors, and attitudes that are part of the natural system all influence how an organization operates and how much of its outcomes are achieved. Because humans vary greatly in their mindsets, behaviors, and attitudes, there can be great variance in an organization’s operations and outcomes. In some cases, this variation can cause unintended disruptions, inconsistencies and competing priorities. Goal specificity can help to minimize the variation that may occur. There is less variation because instead of each individual’s idiosyncratic dispositions or professional/personal interests driving decision making and action, there is more widespread understanding – and ideally agreement –
about the organization’s desired ends and the appropriate means for accomplishing them.

The impact of goal specificity can be great given human variability in any organization. While the work of DEI is rooted in the idea of meeting the needs of a wide variety of people, it is for this exact reason that having a clear goal to drive strategy toward a more inclusive organization is necessary. Ultimately, people feel more motivated and can adjust their actions accordingly when there is a clearly stated goal at the organizational level.

**Organizational Culture**

Every organization has an organizational cultural paradigm. This paradigm is based on a set of patterns and assumptions that inform how the organization believes work gets done. Organizational culture is a combination of messages about underlying beliefs, values and norms in an organization and the interactions and patterns of people, which spread and reinforce the cultural message.

More tangibly, culture can also be described as the “shared pattern of beliefs and assumptions held by organization members. It is their characteristic way of perceiving and producing the organization’s values, norms, behaviors, artifacts and environment” (Bridwell-Mitchell, 2018). It is important to call out the tangible existence of culture because over the last 25 years, there have been dozens of researchers who have debated how to define and study the elusive - culture (Ott, Shafritz, & Jang, 2011, p. 353). Nonetheless, this long-standing debate supports
the idea that the study of organizational culture is critical to understanding an
organization.

Cultural norms are deeply embedded into an organization. To that end,
teasing out key elements of mindsets and behaviors that require intervention proves
to be difficult, unless there is strong intention to uncover these behaviors.
Understanding the underlying assumptions and patterns of an organization serves
as an initial step toward helping an organization to move toward their desired
culture.

Oftentimes, those who are a part of the culture find it difficult to
acknowledge the behaviors and mindsets ingrained in the culture because they are
swimming in it. Becoming a more inclusive organization requires that the systems,
structures and processes of the organization be examined. Gerry Johnson
suggests that applying the culture web “can be used as a convenient device for a
culture audit” (1992) as a way to examine and understand the collective set of
values, norms and routines of an organization. The use of a framework such as this
helps to uncover the formal and informal experiences shared across the
organization. As shown in Figure 7, the culture web distinguishes key elements of
an organization’s culture that can be derived from symbols, power relationships,
and organization structures, for instance.
Assessing the organizational culture not only provides a level of awareness, but it offers an explanation of certain phenomena that are occurring within an organization. While most seek to define organizational cultures as either positive or negative, this is a shortcoming as it only addresses the content of the culture. For a more nuanced analysis, it is important to define organizational culture as weak or strong, which speaks to the organizational structure, highlighting “patterns in people’s relationships, which are the conduit for the cultural message” (Bridwell-Mitchell, 2018). Culture in organizations is often developed and influenced by the relationships that exist. The stronger the relationships between and amongst
individuals the stronger the cultural ties. Thus, a strong negative culture has
different implications than a weak negative culture.

Any organizational change must undergo some sort of organizational cultural
analysis that will support its understanding of the current state of the organization
and its aspirational state. This is no different for an organization that is seeking to
become more inclusive. Thus, if the organization’s existing underlying assumptions
and patterns are in conflict with the behavior and mindsets of the characteristics of
an inclusive organization, then it will be difficult for the existing organizational culture
to simply become more inclusive by putting in place systems, structures, and
processes. The organization will need to acknowledge and surface the underlying
assumptions that may be in opposition of an inclusive organization and then work
intentionally to limit those behaviors that are connected to the underlying
assumptions and adopt new behaviors. For instance, an organization may have a
bonus structure in place to reward top sellers; however, if there are contributions
from other staff to support those sales who are not recognized in any way, the
system alone will show a lack of inclusivity.

The work of creating an inclusive organization by way of redesigning the
structures, processes, and policies is a complex task. A deep understanding of DEI,
particularly how diversity, equity and inclusion are distinct yet connected is
foundational. Further, it is necessary to elevate and acknowledge the cultural
dynamics of an organization that may be in misalignment to an inclusive culture.
Having clarity on these three bodies of research will be the foundation to create a blueprint for an inclusive organization.
The Strategic Project

Theory of Action

The guiding strategy for my work was to utilize an inclusive process to re-design elements of the firm’s operating model, to create more inclusive and equitable systems in the firm. From July - December 2018, I led the staff engagement process to re-think how the firm was organized. The redesign was affectionately described as designing the “Firm of the Future,” which acknowledged the growing diversity of the firm and scale of impact of the firm. Building on the premise that diverse participation in the redesign process would result in a more diverse, equitable and inclusive design, the below theory of action guided my work.

If I/We:

1. Create venues to gather feedback form a diverse set of voices
2. Structure the venues to specifically gather feedback on key dimensions of the firm’s operating model
3. Utilize the feedback to inform the re-design of the firm’s operating model
4. Collect staff perception data on how staff are experiencing the engagement process to re-design the firm’s operating model

Then:

1. All staff will experience more inclusion as designers of Ed First’s Operating Model
2. An operating model will be created that is equitable to all staff and meets individual needs, particularly staff on the margins
3. An operating model will be created that meets the needs of the firm to ensure it maintains operational and financial sustainability

The above theory of action would not only support the redesign of the firm’s operating model, it would also support the firm in reaching long-term organizational goals to become a more inclusive organization. Through the execution of the theory of action, the firm desired to create an operating model that would yield more
inclusive policies, systems and structures, thus resulting in team members experiencing the firm as being more inclusive as an organization overall. Further, as a result of this process, Ed First would then have a blueprint, of sorts, to engage all staff equitably through a change process for future firm-wide decisions and the decision-makers would have clarity of the resources (people, time, and money) needed to engage staff for inclusive decision making. This would lead Ed First to continue to make structural changes dedicated to becoming a more inclusive organization and ultimately support Ed First in delivering on its full RIDE promise organizationally and the impact it seeks to have in the world.

I led my strategic project in collaboration with the Firm of the Future (FoF) Planning Team, which consisted of a Partner, the Chief Operating Officer, the Director of Growth Strategy, and an Operations Specialist. With their content and contextual expertise, my charge was to serve as the project manager to lead an inclusive staff engagement process to inform the redesign of the firm’s operating model. The next section describes these efforts in more detail.

**Description**

For my strategic project, I supported the firm in redesigning its operating model - structures, processes and people. From a tactical standpoint, I led the staff engagement process to collect feedback from a diverse group of team members from across the firm to inform the redesign. I created venues and protocols to collect feedback, as well as facilitated conversations to collect this feedback. After
gathering and organizing the data, I provided insight on how to interpret the data to inform design decisions and ongoing communication with firm.

From a strategic standpoint, I created space for communicating with various audiences who had various interests and spent time unpacking the critical individual messages and perspectives in order to inform the work. In serving as an interpreter of sorts, I was also able to champion some of the most important and closely held perspectives as messages were translated from feedback to writing for firmwide communication.

For an organization to become more inclusive, it requires individual mindset and behavioral shifts, as well as tangible structures, procedures, and practices that will reinforce and encourage organizational advancements in the context of DEI. I saw my charge to extend the RIDE Learning Agenda beyond individual learning and application and to infuse a spirit of inclusion firmwide. Through my strategic project, I sought to understand:

- What values, mindsets, and beliefs were revealed during this process as it relates to having a more inclusive decision-making process?
- And how might those values, mindsets, and beliefs inform shifts toward a more inclusive organization?

More broadly, I wanted to understand, “How can an inclusive process provide insight on what it takes to become a more inclusive organization?” My hope was that the feedback that I gathered from staff would be used as data to help the firm to intentionally redesign its entire system, including but not limited to business development, project staffing, and career advancement. If done well, the system would be redesigned to live and breathe the RIDE Agenda. To redesign the firm’s
operating model the COO and I sought to use an inclusive process to support the move into a more inclusive organization. Prior experience with structural change in the organization indicated that the firm must be extremely thoughtful about how to engage staff in this process. The only other change of this magnitude included the partner-led hiring of a CEO that did not include the voices of Ed Firsters. As shared by an Ed Firster:

In Sept 2012 we had what has become known as the "come to Jesus" Ed First retreat. It was held in Seattle and it was the first time the organization came to grips with its growth. At the time we were about 25-30 people and the Partners had just announced a new CEO, shortly before the retreat. During the retreat, the CEO started leading us in a "blue sky" visioning exercise which immediately derailed because people needed to process the big changes and their feelings about how the company was growing. At one point, we all ended up sitting in a big circle and just sharing while the Partners, to their huge credit, listened. It was like a family meeting and was painful and cathartic. The result of this "come to Jesus" retreat was that the Partners began instituting changes in the way they communicated, in "the Deal" and in other fundamental structures. The other results of that retreat were what happened at the next retreat - the infamous Savannah retreat - where the relief of being heard by the Partners and seeing changes happening resulted in increased confidence in the firm’s leaders and how we were getting there.

The FoF Planning Team met weekly to design the Core Design Team (CDT) sessions and to determine which data need to be collected and shared with the CDT. The FoF Planning Team met consistently in the beginning and dismantled as the CDT engagement process came to an end and the implementation of the designs began in November 2018.
Project Change to Project Clarity

Before jumping into the project that I actually engaged in, it is important to note the original project that I was slated to lead and why that focus changed. Prior to beginning residency, my supervisor and I agreed that my strategic project would be focused on- “Developing/Designing/Launching Talent Management System (or pieces of it) with a specific focus on one or more of the following areas:

- Onboarding, Induction and Support
- Career pathways identification and making clear and transparent what is necessary to advance expectations in the organization
- Contribute thinking to the Competency Model” (S. Bodary, personal communication, April 20, 2018).

At the start of my residency experience, my supervisor who also serves as the Managing Partner, was managing her regular duties and the firm’s talent operations with the support of other team members. During this time, the firm was actively searching for a Chief People Officer (CPO). The firm’s first CPO was hired and began in September 2018, three months after I began my 10-month residency. The interconnected nature of talent to the overall operating model suggested that the talent management system could not be redesigned in a silo but rather in collaboration with all of the other systems. As a result, Ed First chose to prioritize the comprehensive systems change as opposed to simply changing one part of the system. Figure 8 provides the key learning from the ExD Workgroup that led to the project change.

Three weeks into my residency, I gained more clarity on my project. My supervisor decided that my role would support the overall “Firm of the Future” work,
which hoped to improve the daily experience of Ed Firsters and to strengthen the solutions produced for clients. The following sections outline the staff engagement activities that I led from July - December 2018.

**Figure 8: Learning from Equity by Design (ExD) Workgroup**

With a deeper understanding of staff daily experiences and learning from the ExD process, we now have the knowledge and tools to more accurately and equitably return to the group’s original charge.

(Firm of the Future Mid-Year Update_July 2018 ASC PreRead FINAL, July 2018, slide 45)

**Staff Engagement Process**

The July All Staff Call (ASC) (held July 18, 2019) served as the official launch to the Firm of the Future work, which would engage staff to provide feedback on how to redesign the operating model. During the July ASC, Dr. McLean planned to share the rationale for changes, share the proposed changes, and share the staff engagement plan to gather feedback. While the July ASC served as the symbolic activity to launch communication for the Firm of the Future work, the Partner team
wanted to engage feedback from every Ed Firster before the design process began in August. In order to accomplish this task efficiently, I developed a process to engage staff immediately prior to the July ASC and after, to begin communicating the changes to come.

**Stage 1: Pressure Testing the Message.** Given the many changes that would likely occur with the redesign of the firm’s operating model, I found it was critical to manage communication in a way that could mitigate confusion, resistance, and other natural reactions to change. The pre-ASC communication involved reaching out to individual staff members for the purpose of pressure testing key messages that would be shared in the July ASC and gathering feedback on the initial design principles. The purpose of this strategy was to build understanding and buy-in from stakeholders, who held a great deal of informal authority in the organization. Once the purpose of the calls was set, Dr. McLean, along with Partner input, determined who should be contacted. These staff members were invited to 1-1 conversations through an email. (See appendix B).

To facilitate these calls, I crafted the content for Partners to share on the 1-1 calls, created a set of questions to use during the 1-1 calls, and a method for each of them to collect feedback. Over a seven-day period, each Partner and Dr. McLean held 1-1 calls lasting approximately 30 minutes each and yielded a great deal of data with a total of 13 team members.

During each 1-1 call, the Partner/ COO previewed the ASC deck, which included an overview of the ExD work that was completed in Spring 2018 and
insights on how data suggested that the operating model needed to shift. After previewing the case for change, callers then sought feedback on design principles for an updated operating model and an early draft of design features for the operating model. The staff members involved in the pre-ASC pulse checks represented team members who served on both the client-facing team and internal team and close to half of the participants were people of color. Using the recorded notes from the calls, I synthesized a number of key headlines:

- Several points resonated such as starting with a review of ExD, a body of work that had occurred in Spring 2018. Particularly, using the ASC as a way to name what was accomplished and learned during the ExD work group was a valuable way to acknowledge that the ExD work group revealed key insights that guide us to needing to update the firm’s operating model.
- The content was not clear enough, particularly around the language we were using. For instance, instead of using RASCI, an acronym used to define roles and responsibilities, to describe where decisions would be made, we needed to simply say that decision making would be with the “developmental/cultural homes” that staff were organized in.
- There needed to be more concrete details about the who, what and how. Namely, what will Partners own and where will staff drive ideation? How will staff engagement look and who will serve as the Accountable Partner (AP) and Project Manager (PM), two traditional project management roles on a consulting team.
- Potential fears needed to be addressed head on to ensure that there was little room for misinterpretation. Specifically, it needed to be stated that the redesign of the operating model was not a way to position the firm to make layoffs as some organizations do. Additionally, there needed to be a clear message that the changes were an opportunity to build on what works and update what is not working well in the firm as it continues to grow and become more diverse as opposed to a narrative that there is something broken that needed to be fixed.
- Historical context matters and can help staff see that change is inevitable for a growing organization. At the time of the July ASC, there were 58 staff members and close to 50% had been hired since 2015, meaning that close to half of the organization had little understanding of what systems, and lack thereof, existed when the organization was only 20 staff members.
These headlines prompted the COO, Founding Partner and I to create a pre-work slide deck for staff to review in advance of the ASC and to refine the July ASC deck to better communicate the proposed changes and the rationale for those changes. One particular headline that informed the deck was providing the historical context of the firm in terms of how it has been organized over the years. Five slides depicted the growing organizational structure of Ed First from “Growing through Creativity; aka The Wild Wild West: 2008 - 2012” to “Post- RSN: 2016 - 2018”. On July 18, 2018, all staff gathered for our monthly ASC and the COO presented information on how the ExD workgroup recommendations would be used to design the Firm of the Future.

**Stage 2: Broadening the Conversation.** Following the ASC, I created multiple venues to engage a broader group of staff. From July 18 - 30, the Partner Team, Chief Operating Officer and I sought to understand how the information from the July ASC landed on various team members. Immediately following the July ASC, Dr. McLean and I hosted an optional Q&A session for staff members. Thirteen staff attended and with no formal agenda, the following questions were raised:

- What will staff engagement look like?
- Who will be designing?
- How will home teams be decided?
- How can iLab test elements in design?
- I’m not a content expert. What are the implications of how home teams are organized?

In addition to creating space for questions from staff, we also gathered pre-design feedback from team members on two key questions:
Of the six dimensions that are critical to our operating model, which features are most important? How should staff engage on said dimensions? Who should be accountable and responsible for what within the key operating features?

Initially, I created a plan for Partners to reach out to another small group of staff members prior to the next Partner Team Retreat between July 18 - 30. The original plan was created to maximize the already limited time that many Partners had to offer. However, one Partner suggested, “I would advise us to do high-touch early interaction with everyone, followed by a small cross-section diving in to identify all the Qs we need to address and to start designing, and then going back out for broader feedback. I believe we will ultimately be much more successful if we take the time now to do early 1:1 or 1:3 calls with nearly everyone. And I believe we can do less engagement later if we do more now” (personal communication, July 17, 2018).

As a result of this feedback, I created a pre-design feedback blitz to speak to as many Ed Firsters as possible through a variety of venues including 1:1 conversations and a New Hire focus group, which specifically targeted staff members who were hired after Mary 2018 (See appendix C). During this engagement blitz, Partners and the Chief Operating Officer spoke to over 85% of Ed Firsters (See appendix D).

Based on staff feedback, the key dimensions that staff felt were the most important to redesign were Hiring and Staffing, Project Delivery, and Develop, Advance and Performance Management, as depicted in Figure 9. Staff perspective on which dimensions to prioritize gave insight into which dimensions might yield
more staff engagement than other dimensions and ultimately which dimensions might be co-designed. After additional conversations with the Partner Team and with Dr. McLean’s advisement, the design approach in Figure 10 was created to address the highest priority key dimensions.

**Figure 9: Most Important Key Dimensions to be Redesigned**

While the needs were somewhat nuanced across groups, race and staff, staffing, project delivery, expectations, and staff development and advancement were noted as the most important issues for staff

<table>
<thead>
<tr>
<th>Key dimension</th>
<th>MOST IMP</th>
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</thead>
<tbody>
<tr>
<td>Business Development &amp; Thought Leadership: Supports for strategically pursuing opportunities in alignment with Blueprint including: BD/proposal support, analytics and TL</td>
<td></td>
</tr>
<tr>
<td>Project Approval: Process for consistent execution of pricing model, project scoping and approval</td>
<td></td>
</tr>
<tr>
<td>Hiring and Staffing: Home team assignments; staffing assignments in alignment with Staffing 2.0; capacity planning, recruitment, hiring and onboarding</td>
<td>✔️</td>
</tr>
<tr>
<td>Project Delivery: Expectations for consistent implementation of project method across home teams</td>
<td>✔️</td>
</tr>
<tr>
<td>Skill and Content Development: Professional learning for core skills for role and services and content knowledge</td>
<td></td>
</tr>
<tr>
<td>Develop, Advance, &amp; Performance Management: Processes for performance management, evaluation, promotion, &amp; coaching</td>
<td>✔️</td>
</tr>
<tr>
<td>Culture: Creating a sense of belonging within home teams and firmwide</td>
<td></td>
</tr>
</tbody>
</table>

(“Staff Engagement Overview”, July 2018, Slide 11)
Stage 3: Assembling the Core Design Team. Now that we had clarity on the key dimensions that should be redesigned, it was time to select individuals to engage in the design process. It was decided early on that the ExD framework would provide guidance for the staff engagement process. A key principle of the ExD framework is to engage people closest to the work as designers, particularly those whose voices are not traditionally heard.

An initial group of members were identified as potential Core Design Team (CDT) members. In selecting members, the COO, Managing Partner and I focused on the diversity of role type, tenure in the firm, race/ethnicity and gender. Both the COO and Managing Partner were also attuned to additional characteristics for team
members such as those who had participated in the ExD process during the spring, as well as those who possessed a high level of informal authority. Once a preliminary list was identified, the Partners reviewed the list and approved the members for the CDT. Each selected CDT member received a call from the COO or the Managing Partner. All who were invited accepted the role.

The CDT included staff from across the organization, both internal and client-facing team members. The internal team members served as subject-matter experts (SMEs) who provided key data and overall insight to the specific dimensions that we were designing for. The client-facing team members represented a mix of tenured and newer staff across racial/ethnic and role type groups.

On September 7, 2018, the Core Design Team was announced via the Education First Bulletin, a monthly communication that provides staff with firmwide updates. Following the announcement, a team member reached out to the Managing Partner to indicate that the CDT membership did not have a representative from the LGBTQ community. This moment highlighted a blind spot in our CDT membership selection process. The Managing Partner reached out to me and the COO to determine how we would respond. I reached out to the team member and we brainstormed ideas to determine the best way forward to ensure that we had a team member from the LGBTQ community. After collaborating with two Ed Firsters, we invited a team member from the LGBTQ community to serve on the CDT. The team member accepted, and we used this experience to understand how we could better honor our commitment to diversity and inclusion. Through the
Firm of the Future microsite, we announced the new team member and communicated our commitment to including a diverse set of voices stating, “The Firm of the Future planning team is committed to including diverse perspectives. After some initial gatherings of the CDT and input from staff (e.g., the first Design Advisory), it became clear that the Core Design Team was missing some important perspectives, so this change was made to create a more inclusive team.” This was a critical moment for the planning team because this was exactly the type of feedback that we wanted to receive, and we were hoping to design a process that would be inclusive of all voices.

On September 5, we held a soft launch meeting to provide the CDT with rationale for the Firm of the Future work, explain the Staff Engagement infrastructure, share the design scope and sequence, articulate the design framework, and ultimately describe the role that each member would play as a member of the CDT. During this meeting we also previewed the ExD process since it would guide the structure of the team’s work together, as illustrated in Figure 11. Specifically, this process included six design steps, with ‘Noticing and Reflection’ at the core and culminating with Testing ideas to begin the iteration process as needed. The premise of ExD is that “racism and inequities are products of design” and, thus, systems can be redesigned to eliminate these oppressive systems (equityxdesign, 2016).
The premise of using ExD was that this design process specifically focuses on designing for staff on the margins, which is alignment with exactly what the “Firm of the Future” hoped to achieve, which was creating an equitable and inclusive organization that would strengthen the solutions the firm produced for clients. The CDT met weekly from September through December 2018. Each CDT meeting served as a “design sprint” and focused on a key dimension of the operating model. Using feedback from pulse check conversations, Q&As and focus groups, the prioritized dimensions were sequenced over the project timeline. This is illustrated in Figure 12, which emphasizes key elements, such as processes in the “Cultivation, Sales & Staffing” structures and “Staff Experience and Development”.

("CDT Soft Launch", September 5, 2018, p. 21)
The COO, Partner Sponsor and I determined which key elements would be co-designed versus user-centered design as determined by staff feedback and using the ExD Decision-Making Framework (See Figure 3), which was used to determine the level of engagement needed when solving firmwide challenges. The proposed scope and sequence was then presented to the Partner Team and approved. The goal was to make very clear to team members the amount of input and feedback that they would have for each key dimension.

**Stage 4: Connecting to Central Business Functions.** As feedback was collected from the CDT and the Design Advisory, Functional SMEs absorbed
feedback relevant to their specific business functions and used the information to inform their redesigns. As shown in Figure 13, the feedback would be gathered through multiple venues and played back to Functional SMEs to develop the redesigns.

**Figure 13: Firm of the Future Feedback Process**

The creation and facilitation of venues allowed me to gather feedback on key dimensions that would inform the redesign of the firm’s operating model.

The first dimension that the CDT designed was the very tangible creation of a Home Team (HT) Assignment process that would lead to the placement of consulting team members to three different consulting HTs. The CDT dedicated two, two-hour meetings to answering the question, “How might we assign consulting team staff and Executive Assistants to Home Teams?” As we approached this question, we considered historical context, industry research and empathy data. On October 12, 2018, I facilitated a Design Advisory to gather input...
on what mattered most to consulting team members as it related to the Home Team Assignment process. Figure 14 depicts the efforts to collect feedback and embed that feedback into the design.

**Figure 14: Home Team Assignment Feedback Loops**

A number of feedback loops have occurred to get us to this point

<table>
<thead>
<tr>
<th>Sept 14</th>
<th>Sept 18</th>
<th>Sept 26</th>
<th>Oct 9</th>
<th>Oct 12</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ed Fisters provided input on what the CDT should know and consider most in designing the process for Home Team Assignments</td>
<td>Kate K provided the CDT with an initial ideation sketch of what a HT Assignment Process could look like and the CDT provided feedback</td>
<td>The CDT reviewed empathy data, historical data and industry research to inform the creation of user-centered problem statements</td>
<td>Kelly, Sarah, &amp; Alison took feedback from the CDT &amp; Design Advisory to inform the “partner-ready” version of the HT Assignment Process prototype</td>
<td>Kate K, Regina &amp; Cristina DT built a prototype &amp; presented it to the CDT for feedback</td>
</tr>
</tbody>
</table>

(“HT Assignment Process_Partner Review”, October)

One of the major steps in the protocol required each consulting team member to complete a survey to provide their preferences for which consulting Home Team they would like to join. The staff preferences survey was designed by the Director, People Analytics and Talent Strategy and I invited three consulting team members to “test run” the survey and to provide feedback prior to launching. Their feedback pushed us to more clearly define language such as “high expertise” and “proficiency,” which were terms used to help understand a consulting team
member’s level of content knowledge on particular topics. Further, I received feedback on the use of “service areas” as a way to define the types of work that consulting team members generally execute. This feedback caused us to clarify further and begin to build a common language.

The feedback gathered from the CDT and the Design Advisory provided the Director of People Analytics and Talent Strategy and two consulting team members with enough staff input to create a prototype for the HT Assignment Process. The prototype went through several reviews with the CDT and then on to the Partner Team for revisions and approval. In the end, the feedback led to an equitable and inclusive process whereby over 90% of consulting team members were matched with their first choice for their consulting HT placement.

**Stage 5: Group Process and Production Feedback and Reforms.** In late October, the CDT began to feel a real tension between the breadth of content that needed to be redesigned and the depth of that redesign. Additionally, tensions arose around the decision-making structure whereby the Partner Team still has the final word on any design. As these tensions began to arise, Dr. McLean sent out a memo to surface these tensions as well as a set of potential solutions and a recommended solution to continue to move the work forward. The recommended solution suggested that CDT identify one key design element to work through using the steps of the ExD process and all other key dimensions would be designed by internal team members with specific elements shared with the CDT to provide their feedback.
It became very clear that we would not be able to dig as deeply into the final dimensions of the operating model as originally paced. As a result, we needed to prioritize a topic within Staff Experience and Development to focus on more deeply,

By late November we needed to adjust the CDT plan. Through some lively discussions where frustrations and shortfalls were shared, the CDT prompted the COO and I to take a step back to assess the way forward given the limited amount of time. The COO proposed a more narrowed focus on a few dimensions as opposed to continuing to address many dimensions with little depth. After receiving feedback from the CDT on the proposed pivot, the COO and I made the decision to not communicate this directly to all staff nor the Design Advisory because we believed that the overall essence of the work would remain the same. The CDT would still be providing feedback and helping to re-design; however, the topics were narrowed so that team members could go deep into a topic rather than attempt to shallowly cover a lot of topics.

As a result, several original design dimensions did not go through the full ExD process with the CDT as the focus shifted from co-design, where CDT members design solutions with the subject-matter expert (SME), to more of a user-centered design, where CDT members served more in a consulting role as the SME takes feedback to lead the design. Namely, the Staff Experience and Development work was narrowed down to focus on the Champion model specifically. This now meant that the Chief People Officer (CPO) would design larger dimensions of Skill/Content Development, Manage Performance, Advancement, and Culture more
independently and then she would take those designs to specific individuals and
the Partner Team for review and feedback, which ultimately always had the final say
in how to move forward.

**Stage 6: Putting it all together and Delivering a Final Product.** Internal
SMEs along with CDT members and feedback from all staff through the Design
Advisories designed solutions for key dimensions of the firm’s operating model.
Partners, Chiefs, and Internal SMEs then reviewed the solutions together in
alignment to the priorities. The initial Operating Model Guide served as a
compository of all of the designs for the structures, processes and people for each
dimension. The COO led the development of this guide as the SMEs used the
feedback and designs that they received from the CDT to inform their ultimate
design choices. Specific components of the Operating Model Guide were then
provided to the Partners to review and provide targeted feedback. Since Partners
had reviewed many ideas in advance of the comprehensive version, they only
needed to review and provide feedback on the stickiest issues. As all of the design
details came together, the internal SMEs crystalized the designs for the operating
model, which were documented in the Operating Model Guide.

The redesigned Operating Model for Ed First resulted in smaller teams with
more responsive and proactive engagement. The smaller teams also served as a
home base to spark deeper relationships and coaching, as well as team-based
sales and delivery to allow for dynamic solutions and building on previous work.
Not only did this process yield the redesign of systems and structures for the firm’s organizational practices, the process also yielded a great deal of data and knowledge about how the firm can organize itself to receive feedback from all staff to design solutions that are inclusive of multiple perspectives, particularly those who are marginalized.

The above-described strategic project that I led was anchored in a larger piece of work to re-design the firm’s operating model - structures, systems and processes. By way of overview, my role was to engage staff in the redesign using the Equity by Design process, a process that infuses the design thinking process as well as the idea of including more voices in the design process. Simply put, my role was to apply elements of the Equity by Design process as a method to act more inclusively as a process, but to ideally lead to a more inclusive and equitable re-design of the firm’s operating model. Thus, my work unfolded through the six main stages above: (1) Pressure Testing the Messages (2) Broadening the Conversation (3) Assembling the Core Design Team (4) Connecting to Central Business Functions (5) Group Process and Production Feedback and Reforms (6) Putting it all together and Delivering a Final Product.
Evidence

Throughout the strategic project, I collected evidence to monitor the extent to which the staff engagement process was inclusive and would ultimately lead to an equitable operating model. Overall, the theory of action was partially achieved based on the evidence to date. While there is strong evidence that the “if statements” were met to some extent, I am less able to confidently state that the “then statements” were met at this time.

IF STATEMENTS

The chart below shows both quantitative and qualitative evidence that the “if statements” of the theory of action were met.

<table>
<thead>
<tr>
<th>Theory of Action “if” statements</th>
<th>Evidence</th>
<th>Progress</th>
</tr>
</thead>
</table>
| Create venues to gather feedback from a diverse set of voices | • Co-designed and co-facilitated 14 Core Design Team meetings with eight standing members attending weekly and 3-5 Functional SMEs attending as needed  
• Initial CDT membership lacked representation from the LGBTQ community. This was corrected immediately when acknowledged.  
• Designed and facilitated 4 Design Advisory meetings with an average of 23 attendees per session out of 60 staff members  
• Both venues gathered feedback from |          |
participants who represent all role types in the organization as well as racial/ethnic, gender, sexual orientation, and tenure diversity.

| Structure the venues to specifically gather feedback on key dimensions of the firm’s operating model | Created a scope and sequence of seven key dimensions to be discussed at each CDT and Design Advisory from September - December 2018  
  ● Key dimensions: Home Team Assignments, BD/cultivation & Project Approval, Project Scoping & Staffing, Skill/Content Development, Manage Performance, Advancement, Culture  
  ● Only four of the seven key dimensions followed the design sprint to gather feedback as planned |
|---|---|
| Utilize the feedback to inform the redesign of the firm’s operating model | Internal SMEs attended the relevant CDT meetings and received feedback from staff to redesign key dimensions  
  ● Internal SMEs referenced feedback to inform redesigns, which were compiled into the Operating Model Guide |
| Collect staff perception data on how staff are experiencing the engagement process to redesign the firm’s operating model | Conducted surveys following CDT sessions #1 - 8 and Design Advisory sessions #1 - 4  
  ● A total of 94 responses were collected over the duration of the 12 CDT and Design Advisory sessions |
Creating Venues to Collecting Feedback from Diverse Voices.

Through a variety of venues, 100% of Ed First staff provided feedback on various elements of the “Firm of the Future” operating model. Namely, the venues for feedback included the formalized Core Design Team, optional Design Advisories, surveys and pulse checks via 1:1 conversations. While the Core Design Team and Design Advisories were the main structured venues that provided space for a diverse set of voices to share their input, I also orchestrated 1:1 conversations and surveys to capture feedback as well.

For the four-month engagement process, I created a scope and sequence that organized key dimensions to be discussed in increments of two-weeks, the length of a design sprint. While the intention was to go through the equity by design process for each key dimension, the Core Design Team was only able to successfully complete a full design sprint for four dimensions: Home Team Assignments, BD/ Cultivation & Project Approval, Project Scoping & Staffing and Manage Performance. Due to time constraints, staff were not able to provide feedback on Skill/ Content Development, Advancement and Culture through this staff engagement process.

Additionally, staff responses from surveys suggest that the venues and structure of the venues provided adequate space for all staff to offer feedback. For instance, one staff member commented after the third Design Advisory, “Definitely appreciate the thoughtful approach you’re taking here. Thanks for the thoughtful
sequencing of different topics and venues. I appreciate that staff have so many opportunities to provide input.”

Overall, there is clear evidence that the first two “if” statements of my theory of action were met through the creation of venues to gather feedback from a diverse set of voices and the structuring of those venues to gather feedback on the key dimensions of the firm’s operating model.

**Feedback to Inform the Redesign.** The third objective involved a collaborative effort between me and Functional SMEs, internal team members who lead critical business functions for the firm. In order to provide feedback to the Functional SMEs in a timely manner that could be useful to their redesigns, Functional SMEs attended Core Design Team meetings for dimensions that were in alignment with their core responsibility. This allowed Functional SMEs to hear the feedback firsthand.

In an effort to ensure that all participants were able to provide feedback, I carefully crafted interactive exercises in google documents so that all participants could record their feedback. For instance, during a CDT that focused on the Project Scoping and Staffing dimension, participants were divided into three groups based on the role that they played in this central function. In the three small groups, participants were asked to create a journey map to document the emotions they experience when executing the Project Scoping and Staffing tasks. The result was qualitative data from distinct user-experiences that helped the Functional SMEs to better understand where the pain points existed. Following this session, a
participant noted in their survey, “I’m very impressed with the materials and opportunities to engage. Thank you for the thoughtfulness you are bringing to this process!”.

After receiving feedback, Functional SMEs were able to utilize empathy data to refine the problem statements for their respective dimensions in the operating model, which then narrowed the focus of the ideation process and specific feedback they needed to gather to improve their designs. The extent to which feedback was ultimately embedded varies by dimension. In some cases, this was due to the fact that there were operational and financial considerations that simply did not allow for certain pieces of feedback to be embedded into the redesign. In other cases, the feedback provided from the staff did not necessarily resolve the root cause.

The intentional use of staff feedback in a dimension was most evident in the creation of the Home Team Assignment Process. Within this dimension, the Director of People Analytics and Talent Strategy was responsible for utilizing the feedback to design an equitable process. During the process, one staff member noted, “Very much appreciate that the Home Team Assignment Process is being designed by Kate K, Regina, and Cristina DT², which gave me a lot of confidence that marginalized and neutral voices were being represented adequately and not overpowered by high-power and loud-voiced individuals.” Ultimately, the intentional design of the staff engagement activities led to high engagement from staff, which

² Kate K is the Functional SME as the Director of People Analytics and Talent Strategy. Regina and Cristina DT are consulting team members.
resulted in Functional SMEs having access to robust feedback to inform the redesigns. The extent to which the feedback landed in the redesign was dependent upon financial, operational and viability considerations.

**Collecting Staff Perception Data.** In addition to ensuring that there were diverse voices engaged in providing feedback, it was also important to measure to what extent those diverse voices felt included in an effort to achieve an inclusive and equitable operating model. To measure this perception, I created four statements to attempt to measure the extent to which participants felt comfortable sharing their feedback, felt valued for their contributions, and believed that their contributions would ultimately influence outcomes for both individuals and the organization at large. I collected data following the first seven sessions of the Core Design Team meetings and all four of the Design Advisories over the course of four months. Participants were invited to respond to the same four statements (listed below) on a scale of 1 to 4, with 1 being “strongly disagree” and 4 being “strongly agree”. The purpose of these statements was to provide insight on team members’ perception of inclusivity in the process as well as perceptions regarding the potential impact of their feedback on a more inclusive model. Statements that related to inclusivity were:

- I felt comfortable speaking up to voice my opinion or concerns on today’s topic
- I felt valued and included in today’s session
- I believe the perspective I shared today will influence the outcomes of this design element
- I am hopeful the designs the group are working towards will meet the individual needs and the needs of the firm at large
While these statements speak to an individual’s perception of inclusivity, it helped us to understand whether or not the system and structure by which we were collecting feedback was inclusive in and of itself. Some of the survey results for these statements can be found in the next section as I describe the evidence for the outcomes of my theory of action.

**THEN STATEMENTS**

<table>
<thead>
<tr>
<th>Theory of Action “then” statements</th>
<th>Evidence</th>
<th>Progress</th>
</tr>
</thead>
</table>
| All staff will experience more inclusion as designers of Ed First’s Operating Model | • 65% of Ed Firsters participated in at least one Design Advisory or were a member of the Core Design Team to provide feedback  
• Design Advisory attendees responded overwhelmingly positive to measures that indicated a level of inclusiveness | ![Progress Icon] |
| An operating model will be created that is equitable to all staff and meets individual needs, particularly staff on the margins, | • At this time there is limited evidence to suggest whether or not the operating model is equitable to all staff and meetings individual needs, particularly staff on the margins | ![Progress Icon] |
| AND meets the needs of the firm to ensure it maintains operational and financial sustainability | • At this time there is limited evidence to suggest whether or not the operating model meets the needs of the firm to ensure it maintains operational and financial sustainability | ![Progress Icon] |
Overall, the evidence for the “then” statements is less robust than the “if” statements because the firm began transitioning into the new operating model in February 2019. At the time of this submission, while team members had transitioned to the new organizational structure where all consulting team members were a part of a consulting practice area, specific functions were still going through the training and handoff process. As a result, there is only some indication that the first “then” statement from my theory of action was achieved, and the remaining “then” statements only have early indication data.

**Inclusivity as Designers.** The staff engagement process laid out specific structures for how and when feedback would be gathered from staff members. The venues were varied and provided participants with the choice to opt in on topics that were most important to them. For instance, for the third Design Advisory, close to 50% of Ed Firsters (28 out of 58 staff) attended the optional venue to view the Home Team Assignment Process prototype and to give feedback on the prototype before it was formally approved. The optional venues were pre-scheduled, and topics were announced in advance to create transparency in the topics that were to be discussed and to provide team members the opportunity to engage effectively.

Following feedback sessions, both CDT meetings and Design Advisories, staff rated their degree of agreement on statements to measure the extent to which they felt included in the process. Participants responded to the following statements on a scale from 1 to 4 with 1 being strongly disagree and 4 being strongly agree:
I felt comfortable speaking up to voice my opinion or concerns on today’s topic.
I felt valued and included in today’s session.
I believe the perspective I shared today will influence the outcomes of this design element.

As the figure below shows, the strongest positive results indicated that staff mostly agreed that they felt comfortable sharing feedback, felt valued and included during the sessions. However, there was less agreement with the statement related to staff perspectives influencing the design.

**Figure 15: Staff perception following Design Advisory sessions**

<table>
<thead>
<tr>
<th></th>
<th>DA #1 (n=15)</th>
<th>DA #2 (n=15)</th>
<th>DA #3 (n=19)</th>
<th>DA #4 (n=9)</th>
</tr>
</thead>
<tbody>
<tr>
<td>&quot;felt comfortable&quot;</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Strongly Disagree</td>
<td>7.10%</td>
<td>0%</td>
<td>0.00%</td>
<td>0.00%</td>
</tr>
<tr>
<td>Disagree</td>
<td>7.10%</td>
<td>0%</td>
<td>5.90%</td>
<td>0.00%</td>
</tr>
<tr>
<td>Agree</td>
<td>42.90%</td>
<td>40%</td>
<td>41.20%</td>
<td>62.50%</td>
</tr>
<tr>
<td>Strongly Agree</td>
<td>42.90%</td>
<td>60%</td>
<td>52.90%</td>
<td>37.50%</td>
</tr>
<tr>
<td>&quot;felt valued and included&quot;</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Strongly Disagree</td>
<td>7.10%</td>
<td>0.00%</td>
<td>0.00%</td>
<td>12.50%</td>
</tr>
<tr>
<td>Disagree</td>
<td>7.10%</td>
<td>6.70%</td>
<td>5.90%</td>
<td>12.50%</td>
</tr>
<tr>
<td>Agree</td>
<td>35.70%</td>
<td>33.30%</td>
<td>47.10%</td>
<td>37.50%</td>
</tr>
<tr>
<td>Strongly Agree</td>
<td>50%</td>
<td>60%</td>
<td>47.10%</td>
<td>37.50%</td>
</tr>
<tr>
<td>&quot;will influence&quot;</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Strongly Disagree</td>
<td>7.10%</td>
<td>0.00%</td>
<td>0.00%</td>
<td>N/A</td>
</tr>
<tr>
<td>Disagree</td>
<td>29%</td>
<td>13.30%</td>
<td>23.50%</td>
<td>N/A</td>
</tr>
<tr>
<td>Agree</td>
<td>50%</td>
<td>66.70%</td>
<td>52.90%</td>
<td>N/A</td>
</tr>
<tr>
<td>Strongly Agree</td>
<td>14.30%</td>
<td>20%</td>
<td>23.50%</td>
<td>NA</td>
</tr>
</tbody>
</table>

In particular, following the first Design Advisory session held on September 14, 2018, 35.7% of respondents strongly disagreed or disagreed with the statement, “I believe the perspective that I shared today will influence the outcomes of this design element”. Conversely, 50% agreed with the statement, while 14.3% strongly agreed. This feedback informed the format of the second Design Advisory
and more time was dedicated to more open discussion in small groups.

Respondents to the second Design Advisory session survey began to feel more confident about their perspectives being heard and used to influence design decisions. As can be seen in the Figure 16 under “will influence” in third column, the proportion of people who agreed their perspective would influence outcomes increased to 66.7% from 50% for DA#1. Acknowledging the change in format, one respondent noted, “Thanks so much for making these breakout sessions longer and with the same group of people for the whole time. This felt like a much richer conversation and I felt much more connected to the people in the group and the conversation as it developed. It felt much less rushed.” Additionally, another staff member makes note of the impact of the feedback, “I really appreciated the changes you made based on the feedback from the last design advisory.” While this was the stated experience of just two staff members, it speaks to the ideal outcome that we were hoping this process would achieve.

Evidence of an Inclusive and Equitable Operating Model. It is too early to confirm whether or not the redesigned operating model as a whole is “equitable to all staff and meets the individual needs, particularly staff on the margin” and “meet the needs of the firm to ensure it maintains operational and financial sustainability”. The firm began the transition to the redesigned operating model on February 14, 2019, with a soft launch where the first step in the transition was to restructure consulting home team members into a consulting home team that focused on one of three practice areas: Outstanding Educators, Effective
Organizations & Investments, or Engaged Students. On February 28 and March 1, 2019, the firm held a Virtual Retreat to begin training and operationalizing the new Operating Model. Despite there not being concrete evidence as to whether or not the new operating model is inclusive and equitable while also meeting the needs of individuals and the firm overall, there is some initial perception and baseline data that can provide some insight.

In addition to sharing perceptions of inclusiveness, respondents also responded to an anticipatory statement related to the extent to which they believed that the redesign would meet the needs of individuals and the firm. Specifically, respondents were asked to rate the extent to which they agreed or disagreed (on a scale of 1 to 4) with the following statement:

- I am hopeful the designs the group are working towards will meet the individual needs and the needs of the firm at large

As shown in the chart below, over the course of three Design Advisory sessions when this same question was posed to participants, respondents were increasingly more hopeful that the designs of the operating model would actually meet the individual and firm needs.

**Figure 16: Staff Perceptions following Design Advisory related to**

<table>
<thead>
<tr>
<th>Venue</th>
<th>Strongly Disagree</th>
<th>Disagree</th>
<th>Agree</th>
<th>Strongly Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Design Advisory #1 - 9/14/18 (n=15)</td>
<td>0%</td>
<td>7.1%</td>
<td>57.1%</td>
<td>35.7%</td>
</tr>
</tbody>
</table>
While the use of real-time perception data will be necessary to measure the extent to which the operating model is meeting the individual and firm needs, there is baseline data that could be useful for the firm to benchmark its progress toward being a more diverse, equitable and inclusive organization. Since 2017, the firm has participated in a Promise54 survey, which measures staff perceptions on issues of diversity, equity and inclusion. Promise54 provides this survey to organizations across the educational ecosystem and then shares best practices from organizations that rate highly on any of the DEI indices. Additionally, Promise54 uses the data to benchmark organizations against each other. With the implementation of the redesigned operating model in February 2019, the firm will be well-positioned to use this survey to examine the DEI implications of the new operating model to determine if it is in fact more inclusive and equitable.

In November 2018, 43 Ed Firsters (out of a possible of 60) participated in the Promise54 “Diversity, Equity, and Inclusion Organization Profile Survey”. The purpose of this survey is to “capture and share data on demographic diversity as well as the existence of DEI policies, systems, and practices” from organizations across the education sector including but not limited to school districts, nonprofits and education-focused private companies (Promise54, 2019). The survey produces an index score for each of the categories of diversity, inclusion, and equity.
As shown in Figure 17, the inclusion index was rated the highest in comparison to diversity and equity, with 75% of respondents having a positive response (agree or strongly agree) with questions related to Inclusion on the survey. Additionally, the data bears that 71% of respondents agree or strongly agree that “Our leaders prioritize DEI”. Both measures outpace organizations that are a similar organizational type, and yet a significant amount of respondents agreed or strongly agreed that “I have personally witnessed bias at our organization” (79% positive response) and “I have been on the receiving end of bias at this organization” (55% positive response). So, while, most respondents feel that the organization is inclusive and the leaders prioritize DEI, there is still evidence of experiences of bias taking place.

Figure 17: Promise54 2018 Survey Response Highlights for Education First

When looking at the data disaggregated by different identity groups, deeper insights into the culture of inclusion, or lack thereof is revealed. Four specific measures worth highlighting are:

- Our leaders prioritize DEI
- Management actions show that DEI is important
• Our organization has an explicit commitment to inclusion
• Our onboarding process signaled to me that we were inclusive

The chart below represents the largest gaps in responses based on race/ethnicity, sexual orientation, and age.\textsuperscript{3} Data for each of these measures are included for illustrative purposes; however, I will speak to two of them. The area that revealed the greatest gaps amongst the most identity groups was “Our leaders prioritize DEI”. As shown in Figure 18, overall, 75% of respondents indicated that leaders do prioritize DEI; however, when looking at the data more closely only 40% of LGBTQ respondents and 53% of people of color had a positive response to this same statement. This gap shows that a large portion of respondents who identify as LGBTQ or are people of color do not perceive that leaders are prioritizing DEI. As it relates to an “explicit commitment to inclusion,” the greatest gap existed with respondents who identify as LGBTQ. Specifically, only 40% of LGBTQ respondents indicated that there is an “explicit commitment to inclusion” at the firm.

\textsuperscript{3} In areas where data is not available, this means that this was not a large enough gap for that particular identity group to be reported.
Our leaders prioritize DEI. Management actions show that DEI is important. Our organization has an explicit commitment to inclusion. Our onboarding process signaled to me that we were inclusive.

<table>
<thead>
<tr>
<th></th>
<th>Overall</th>
<th>White</th>
<th>People of Color</th>
<th>LGBTQ</th>
<th>not LGBTQ</th>
<th>Under 30</th>
<th>30+</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>75%</td>
<td>89%</td>
<td>53%</td>
<td>40%</td>
<td>76%</td>
<td>55%</td>
<td>80%</td>
</tr>
<tr>
<td>Management actions show that DEI is important</td>
<td>74%</td>
<td>89%</td>
<td>53%</td>
<td>40%</td>
<td>79%</td>
<td>91%</td>
<td>58%</td>
</tr>
<tr>
<td>Our organization has an explicit commitment to inclusion</td>
<td>71%</td>
<td></td>
<td>40%</td>
<td></td>
<td>60%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Our onboarding process signaled to me that we were inclusive</td>
<td>65%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The data outlined above was collected in November 2018 prior to the implementation of the redesigned operating model in February 2019. As such, this data can serve as a valid baseline data point for which the firm can compare and examine staff perceptions on diversity, equity and inclusion after 10 months of implementation when the annual survey is conducted again in November 2019.
Analysis

Throughout my strategic project, I developed venues to gather the diverse perspectives of staff members so that their input would inform the redesign of the firm’s operating model, with a focus on structures, people, and processes. The desired outcome was to create a more inclusive and equitable operating model that would meet the needs of all individuals, especially those on the margin, and the firm overall. As noted in the evidence section of the capstone, there is strong positive evidence that the “if” statements of the theory of action were achieved. However, the results for the “then” statements are in part inconclusive. Here are some questions that the pattern of data raises about the Theory of Action and its efficacy:

- Why did a diverse group of staff members participate in the staff engagement process to redesign the firm’s operating model?
- What prevented the Core Design Team from being able to redesign all six of the operating model dimensions as planned?

Why did a diverse group of staff members participate in the staff engagement process to redesign the firm’s operating model? Clear structures for feedback, signals of importance and a variety of spaces to engage led to strong participation across the firm in the staff engagement process. Ultimately, this resulted in staff members providing a wealth of feedback that could be used to inform the redesign. So, what were the conditions that led to this?

From the beginning of the project, it was made clear that we wanted to engage all staff and particularly, “staff on the margins.” This phrase illuminates that there are individuals who do not possess privilege and power and are often do not
have a seat at the “decision-making table”. By stating early and often that the staff engagement process itself was meant to engage everyone, and in particular marginalized people, it set the stage and expectation for the work I needed to do. Additionally, it sent a message to “staff on the margins” that we want to hear your voice.

The creation of the Core Design Team (CDT), which was a subcommittee of sorts, was created to deeply engage a diverse group of individuals from across the firm over a 16-week period. The structure of the CDT essentially invited “staff on the margins” to have a “seat at the table” to work closely with the designers as they provided critical feedback on the redesign. In collaboration with the Firm of the Future (FoF) planning team, we invited select staff to be members of the CDT based on the following identity markers: race/ethnicity, gender, age, tenure, and role type. Although, there was never an explicit discussion regarding the dimensions of diversity that we would consider in the selection of CDT members, myself and the planning team members passively agreed that these were the identity markers that we would use. The FoF planning team ultimately failed to be thoughtful about other dimensions of identity, particularly those identity markers that are non-visual and not necessarily common knowledge. The initial CDT membership lacked representation from the firm’s LGBTQ community.

As I reflect on why this happened, I can say that I heavily relied on visual and professional-based identity markers, such as race/ethnicity and tenure, which are much easier to ascertain. Oftentimes, but not in all cases, race/ethnicity can be
determined visually. Further, the tenure of a staff member is often common professional knowledge for those internal to the organization. While I had only been in the organization for about two months at this point, I felt comfortable identifying and requesting information on a small set of identity markers, such as the ones above.

Additionally, as a heterosexual woman, the LGBTQ lens is not one through which I have readily examined diversity. Unconsciously, I overlooked this dimension of diversity, which resulted in me not interjecting to advocate for the addition of this dimension and not posing any questions about whether or not this was a dimension that the FoF planning team should consider. My dominant sexual orientation identity placed me in a position of privilege and resulted in a blind spot in my own leadership.

Not only was I unconscious of this bias that I held, there was also not a comprehensive data source for me to go to in order to find out this information, even had I asked. At the time of the CDT selection, the firm had not independently conducted a comprehensive demographic survey of the staff in its 12-year history\(^4\). The firm’s RIDE journey had led to conversations about race and diversity; however, the lack of a comprehensive data source at the time might suggest a limited understanding of the role that knowledge and awareness of diverse identities, both visual and non-visual, plays in creating a more inclusive culture where everyone has feelings of belongingness, connectedness, and value in an organization. It is difficult

\(^4\) A comprehensive demographic survey was administered to staff in December 2018.
to create an inclusive culture for diverse identities when it is not common knowledge what the diverse identities are and need to be inclusive of. Since there was not self-identifying data available, knowledge of one’s non-visual identity markers would only be known through communicating this information to certain colleagues, likely those where there was a deeper relationship.

Ultimately, the FoF planning team, including myself, relied heavily on visible and professional identity markers. This moment in our CDT selection process could have been deemed a failure as my unconscious behavior excluded an entire group of staff members. And yet it served as a powerful learning moment for me to learn to explore diversity more deeply than what meets the eye and to speak up in the absence of identities that do not have a seat at the table.

Another reason why staff were able to engage in the staff engagement process is because there were consistent systems set up to engage staff. This was made possible by the extensive amount of time that I spent working on the staff engagement process. From September 2018 through December 2018, I designed and facilitated weekly CDT meetings, held planning meetings between those meetings, hosted Design Advisories, and maintained a microsite to communicate updates to staff. As a result, I spent a large majority of my time on the Firm of the Future work during my residency, leaving very little time to work on client projects. As a Senior Consultant, I was expected to work client projects; however, one of the reasons that I did not actively pursue consistent client work is because of the importance, volume and intensity of the Firm of the Future work.
At the start of my residency, one partner noted, “I am not aware of change this big that has happened at Ed First. Nothing structural has taken place to this magnitude.” This message along with others signaled to me that the operating model redesign was one of the biggest changes that the firm had experienced in its 12-year history. As I received signals that the redesign was a critical piece of work for the firm, I felt the pressure of keep up with the pace of the work by not actively pursuing client projects.

I chose to prioritize my focus on the staff engagement process. Because I knew the staff engagement process was really important and I was already feeling overwhelmed by the pace and the amount of content that I needed to learn in order to lead the staff engagement process well, I chose to turn down projects that were presented to me. As I felt my time was limited, I also took into consideration whether or not the project would be fulfilling to me overall and whether the project would require me to learn a great deal more content or process knowledge in order to execute well. I believed that if the project was fulfilling, it would be worth pulling my attention away from the staff engagement process. If the project required me to gain a great deal more content or process knowledge, I believed that it might take away from the critical work of leading the already overwhelming staff engagement process.

My ability to maintain my commitment to this project was mostly because I was a dedicated human resource who did not have to compete with the challenges of billable hours. While some members of the CDT were not able to attend some of
the CDT meetings due to client work and certainly some team members made choices not to attend Design Advisories due to client commitments, myself and the COO were rarely placed in this predicament because of our internal facing roles. As a result, we were able to provide a level of consistency and continuity to the feedback conversations over time.

By nature of a consulting firm, projects have a start and an end date. And in true consulting firm fashion, there was a project plan and clear tasks to move the work forward. As suggested by Scott and Davis, goal specificity can help an organization to have clarity about the resources that are needed to achieve a stated goal. In redesigning the firm’s operating model through an inclusive process, the time-bound nature of the task certainly served the organization well. And, the commitment to becoming a more inclusive firm is ongoing; thus, a project end date is not applicable, and the reality is that the hours and scope of the work cannot be fully projected.

At Ed First, value is typically signaled through the number of hours that are allocated to a project, particularly if it is not revenue-generating. Thus, staff are expected to work 80% of their billable hours toward client facing work. For work that is non-billable, it signals that it is a high priority. Thus, there are only six fully internal facing team members without a billable hour expectation out of 60 team members.

By definition, billable hours means “the hours of work time that can be charged to a client”. This is a standard for professional services firms. As such, in
order for the firm to make money and remain financially sustainable, staff must maximize the amount of time that they engage in work that can be billed to a client. More simply, in an eight-hour workday, from a business perspective, a team member who is working on client work for eight-hours is providing more oxygen to the firm than is a person who may be spending two-hours on providing feedback to the firm. The time trade off may not make immediate sense as it is difficult to quantify the business impact of those two hours that a staff member has given to share their voice or help to create a more inclusive environment. Subsequently, when the firm devotes a great deal of time to a non-billable project, this is a clear signal of importance. In the case of the Firm of the Future, the FoF planning team and the CDT members devoted significant time to participate without any reduced billable load. For the ExD workgroup, earlier in 2018, more than 600 billable hours were waived for team members to accommodate their internal work on ExD. Given that the firm had already committed significant hours in the previous iteration of the work, the firm needed to maintain the billable capacity expectation, particularly in quarter 4. Ultimately, the inclusive process created the space for diverse perspectives to be shared. As stated by the COO, there was a “richer and better design because Ed Firsters participated. Partners and Chiefs considered the feedback greatly”.

What prevented the Core Design Team from being able to redesign all six of the operating model dimensions as planned? The Firm of the Future redesign process cannot be confined to a design sprint, but rather, it is more like a
never-ending design journey. From the start of the project, there were various perspectives from senior leaders regarding the scope and sequence of the work that could be accomplished in a four-month period. While some Partners advocated for a particular sequence of the dimensions to be redesigned, others pushed for the dimensions to be more tightly defined so not to allude to the entire system being redesigned. Over the four-month period, only four of the seven dimensions followed the design steps as planned. I believe that one of the factors that led to this was my struggle to lead in a context that required me to learn new content and a new process, with limited interest.

Throughout the strategic project, I struggled to see myself as leading the staff engagement process. While I have led school turnarounds that involved redesigning systems and I have observed this work being done at the systems level, I found it incredibly challenging to translate those skills to this context. The learning curve was steep, and the volume of work was overwhelming for me. And further, I did not find meaning and personal fulfillment in the task.

When we began this work, I underestimated the amount of time that it would take to actually work through the ExD process for each of the dimensions. Because I had never led a formalized design process such as this with so much complexity, I struggled to see the challenges that might exist with the volume of work that we were trying to achieve.

For the first two months of the strategic project, I was overwhelmed by the new terminology, the design process, and the intensity of the work. Each week, I
was tasked with facilitating the content and the process, neither of which I was well-versed in. This meant coordinating tasks with Functional SMEs to gather research on their respective dimension and preparing for the weekly 2-hour CDT meeting with thoughtful activities for staff to engage in and provide their input. To learn about the design dimensions, I would attempt to make sense of the content as I was conducting the research - gathering historical data, industry research, and empathy interviews. However, in many cases, this was insufficient because I was not able to spend dedicated time with the new information in a way that was cohesive to the larger operating model. As a result, I found myself making trade-offs to be ready to facilitate the weekly CDT meetings and instead focused on the design of the meeting to ensure that staff could provide the relevant feedback. Even then, the complexity of the project and interconnected nature of all of the dimensions made it difficult for me deliver quality facilitation. I felt constantly stretched and underprepared.

In late November 2018, after the CDT had met for two-hours weekly since September, tensions began to rise as the group struggled to make sense of the progress we were making. The original scope and sequence that I had mapped out suggested that the CDT would go through a design sprint of nine steps for six dimensions of the operating model. Each dimension took longer than expected as there were many layers to dig through to determine what within the dimension would be redesigned. We were constrained by time because all of the input for each dimension needed to be provided by the end of the calendar year to inform
the budget process. The pressure of redesigning the operating model in a time-bound period ultimately meant that there were tradeoffs for the breadth of dimensions that we could address versus the depth within dimensions that we could address.

After going through two months of the staff engagement process and having a stronger sense of what the work entailed, I began to feel more confident in being able to speak up to influence the process. For instance, during the FoF planning team meetings, I would suggest that we needed to slow down the process to revisit the same topics again as the conversations felt unsettled. In other cases, I would make real-time facilitation moves to adjust the agenda to meet the needs of the participants to ensure that their perspectives were being heard. However, I am not confident that these leadership moves were powerful enough as I still felt the incredible pull to be prepared weekly with new content to move the group forward.

With my limited knowledge and expertise, I was not able to have the foresight to mitigate the sequencing challenges before they occurred because I lacked the technical and content expertise, “TCE” as it is called in the Ed First competency model, to drive the work. While I had the hours to complete the work, I truly struggled with deeply understanding the systems that team members were providing feedback on because I had never experienced them myself. As a result, as I collected feedback on specific dimensions, it was difficult to make connections to the other dimensions as well as make sense of the feedback to inform the next design meetings. Ultimately, I struggled to drive the work because I lacked the
critical content knowledge and at times skills needed to keep the work on track. Further, I failed to acknowledge this challenge early enough in the process and then advocate with solutions for myself to get the additional resources I needed in order to build my confidence.

Why do we not know the early indicators for whether or not the redesigned operating model is equitable and inclusive? There is evidence that the time spent to conduct an inclusive process resulted in the intended outcome of having input from diverse perspectives from across the firm to inform the redesign the firm’s operating model. And, there are existing cultural norms at Ed First that might suggest that this type of process may not be the most effective under other circumstances.

Getting Stuff Done, also referred to as GSD, is a highly coveted competency at Ed First that all team members are expected to exhibit. The individual expectation of being a “GSDer” then also extends to how groups of team members go about completing work. Further, GSD also results in taking on more to accomplish in the same amount of time or with the same resources, rather than slowing down and scaling back. The firm values and incentivizes GSDing, which I have experienced as completing a large volume of work, with a depth of understanding at a high level of quality in a short period of time. The combination of volume, depth, quality and pace is what can cause GSDing to be challenging under any circumstances.
Throughout the implementation of the project, I experienced the “getting stuff done” culture of the firm to be in tension with the process to gain inclusivity. I would describe an inclusive process to be one that does include a large volume of content based on the amount of feedback that is received from various perspectives. However, to achieve the essence of an inclusive process, or even culture for that matter, depth and quality, there is an element of time that must be flexible and unbounded.

Due to financial and budget implications, it was necessary that the staff engagement process conclude by the end of the calendar year to coincide with budget conversations. When looking back at my self-described dimensions of GSD - volume, quality, depth, and pace, it was really the volume of the task that caused the greatest amount of tension for me and impacted the CDT to address all six dimensions given the allotted time. The high volume was created by two factors: 1) The commitment to using the ExD process, which was the mechanism by which we gathered feedback from staff in a predictable way and 2) the number of dimensions that we chose to redesign in the set period of time. In prioritizing those two factors, I completely overlooked the need to develop a measure to monitor the extent to which the operating model itself was equitable and inclusive. I became consumed by the amount of feedback that we were receiving and struggled to source the complexity of the feedback so that it could be useful for Functional SMEs.
Applying Johnson’s culture web for an organizational culture diagnosis provides some insight related to this cultural phenomenon. The behaviors associated with “Getting Stuff Done” are not only valued but are expected. There is a clear accountability system in place that, at least annually, monitors to what extent someone “gets stuff done.” Because this is an individual expectation, it becomes a cultural norm that the organization values.

While we applied a technical step by step process to be completed within a set amount of time, we were attempting to address adaptive issues that could not be resolved by a predetermined time limit. A risk of this approach is that inclusion leads to a great deal more variables to consider in the development of a plan. There is a greater chance of divergence in ideas and possibilities that potentially lead to more conversations. Consequently, there must be someone skillful enough to be able to facilitate and manage inclusive conversations to hold the divergence, but also lead the conversation toward convergence so that discussions can move forward collectively. As a result, I attempted to serve in this role and raise the most pressing issues when necessary and facilitated difficult discussions to move individuals to a common understanding. Further, I committed to maintaining the continuity between the conversations and feedback to ensure key messages were not lost. In taking these actions, I knew that I was making a tradeoff to go deep, which may have compromised the volume that we were able to get through and the quality.
The GSD culture is so strong, the firm seems to have an aversion to patience. Currently GSD is elevated as more of a cultural norm than is inclusivity. And while both GSD and inclusion now appear in the competency model, which is used for annual performance reviews, there is not yet a common language and strong cultural norm for what inclusive processes should look like and require. There are not yet symbols and traditions, for instance, that are elevated in the same way that GSD is. Given the impact that GSD had on the inclusive process, I would argue that the GSD culture might also affect the cultural shift to become more inclusive until it is fully baked into the culture.

**Summary.** The firm has an ongoing commitment to becoming a more diverse, inclusive and equitable organization. While the purpose of the Firm of the Future work was to redesign the firm’s operating model, the firm has a strong understanding that this is a journey that requires constant refinement of systems, structures, processes and reallocation of resources. I was also making a bet on the process to be one that could be embedded into the organization and set the necessary condition to be a more equitable organization. The inclusive process ultimately contributes to and advances the organization’s efforts to become a more inclusive organization.

The Operating Model officially launched on February 14, 2019, and thus, it is too early to sufficiently confirm whether or not the staff engagement process served its purpose on using diverse voices to influence the redesign of the firm’s operating model thus creating a more equitable and inclusive operating model. The
recommendations in the implications section provide thoughts on how Ed First can confirm the expected impact and to consistently move toward a more inclusive organization.
Implications

As I led this work, I wanted to understand how a time-bound inclusive process might provide the firm with insight on the demands, commitments and behaviors associated with creating a more inclusive culture. Moreover, I wanted to understand how Ed First could continue to grow in size and impact in the field while creating a more inclusive culture for all team members to do their best work. After examining the evidence through a lens of organizational culture, organizational theory, and diversity and inclusion management. Below, I articulate implications for the site as it relates to the above questions, as well as implications for the sector. Finally, I discuss self-implications as a result of leading this work.

Implications for Site

Education First has made significant strides to become an inclusive organization as evidenced by the commitment to human and financial resources to RIDE since 2016 and anchoring the Firm of the Future re-design in becoming a more inclusive organization. Further, as indicated on Education First’s website, the firm is actively working to incorporate RIDE into its organizational structures. Thus far, the firm has, “formally incorporated a focus on RIDE in our project delivery approach,” which means teams are learning to discuss issues of race, inclusion, diversity and equity with potential and current clients throughout a project, and the staff competency model has been updated to include competencies for inclusion and bias to ensure alignment with the “expectations for performance and performance review processes” (“Our Equity Commitment,” n.d.).
There is a difference between having an inclusive process versus being an inclusive organization. Over the course of this project, significant hours were dedicated to executing the staff engagement process. Specifically, the eight Core Design Team members met for no less than 32 hours each over the course of 16 weeks to examine key dimensions of the firm’s operating model and develop and test solutions to increase equity and inclusion to infuse throughout the organization. For a professional services firm whose oxygen and viability is based on billable hours, this is a lot of time to be spent on a structure that is not sustainable. As such, this model cannot be replicated because of the time intensity.

And yet, the success of the staff engagement process provides insight for key actions that can be applied to achieve greater inclusivity and equity in the firm. Moving forward, the potential challenge will certainly be the dedicated human resource to be able to gather feedback, utilize the feedback to create a design, gather more feedback and iterate the design until it reaches its final product. For Education First to continue to evolve into a more inclusive culture, the firm can:

1. Prioritize DEI: Set clear goals and monitor organizational inclusion
2. Build Capacity: Train senior leaders to develop skills to lead inclusively
3. Cede Power: Extend the purpose of the RIDE Braintrust to engage in shared decision-making

The recommendations below highlight specific ways that Education First can continue on its journey to become a more inclusive organization.

**1) Prioritize DEI: Set clear goals and monitor organizational inclusion.**

An organization’s priorities drive its strategy and signal to team members what they should be spending their time on. As noted earlier in the review for knowledge for
action, goal specificity tends to lead to increased human motivation (Scott and Davis, 2016). In alignment with this theory, many organizations consistently set financial goals that are not only monitored closely, but also impact human behavior. And, while financial sustainability is a top priority for any organization, many businesses have begun to embrace the triple bottom line concept, which prioritizes “performance in social and environmental terms” (Colbert & Kurucz, 2007, 22). The triple bottom line is a business concept by which an entity sets and monitors goals beyond just their profit margin. As shown in the figure below, “triple bottom line” (TBL) includes the dimensions of people, planet, and profits, and posits that it can be a framework for reinforcing goals for sustainability in a complex organization (Slaper & Hall, 2011, 4). Using the TBL framework, an organization might set goals around the planet (environment) which measures “natural resources”; people (social) which measures “education, equity and access to social resources, health and wellbeing, quality of life, and social capital”; and profit (economy) which measures “income or expenditures, taxes, business climate factors, employment, and business diversity factors” (Slaper & Hall, 2011, 5).
In February 2019, the firm released its 2019 priorities (see appendix E). Those priorities drive the key performance indicators (KPIs) that will be produced, which will then be monitored and reported on throughout the year. In order for Ed First to continue to move forward in their journey to become an inclusive organization, they must set clear goals around organizational inclusivity and formalize how they are monitoring those goals. While Ed First has made a stated commitment to equity both internal and external to the organization, there is an opportunity for Ed First to implement a “double bottom line” of sorts to concretize its commitment to “people” and “profit”. The commitment to the “people” bottom line would build off of the firm’s existing efforts to prioritize inclusion.

In alignment with the firm’s equity commitment to track and learn from the data collected from surveys such as the Promise54 survey, it is imperative that the firm formally set a “bottom line” goal related to its commitment to equity with the same
level of intensity that it monitors the “profit” bottom line. In such a data-rich organization, it will take priority setting and discipline to move beyond the collection of data points that point to how inclusive and equitable the organization is and move toward a consistent monitoring and reporting system for these metrics. By setting clear organizational goals for inclusion, there will be a greater propensity to monitor and report the data on a more frequent basis.

Currently, the annual Culture Survey and Promise54 data provide some insight toward how inclusive the organization feels to team members. And while these data points are reviewed and reported on, there is a difference in how these measures are looked at compared to measures related to profit. Data speaks for itself and allows leaders to account for results – whether it’s representation, actions (e.g., hires, promotions, termination, compensation actions), or sentiment. The qualitative sentiment allows for deeper awareness and empathy that might, in turn, help people be heard and feel more respected.

The report “Unrealized Impact,” produced by Promise54, indicated that “Approximately half of the organizational leaders in the Organizational Profile Survey are not employing practices to advance diversity, equity, and inclusion in their organizations” (72). One promising practice that the report identifies as critical to laying the foundation to becoming a diverse, inclusive and equitable organization is to “Monitor Progress” of DEI related indicators. To operationalize its commitment to organizational inclusion, Ed First might consider setting a clear goal and follow an
annual protocol to develop metrics to monitor their “people” bottom line throughout the year. The protocol would include:

1. Use the Promise54 and Culture Survey data as baseline data.
   a. Determine which 3-5 measures to set goals from based on examining data based on gaps
      i. Be mindful to select measures that can be monitored more frequently than an annual basis. For instance, demographic data is best measured annually, whereas staff experiences can be measured on a more frequent basis.

2. Set firm-wide goals team-based goals as it relates to having an inclusive and equitable environment.

3. Communicate the firm-wide and team-based goals to the entire firm.
   a. Highlighting the baseline data and the goal.
   b. Additionally, share how data will be collected over time to monitor the goals.

4. Implement systems to collect data and to monitor the goals over time
   a. The HT Systems & Operations Lead should take ownership of collecting, disaggregating, and monitoring the data.
   b. Embed the monitoring and reporting of this data into the meeting cadence structure for Home Team Leadership Team (HT Partner, Principals, Champions, and Strategy & Ops Lead) at least monthly.

5. Report out data (disaggregated by identity groups) at least quarterly to the entire firm and respectively to each Home Team
   a. Engage in reflective conversations about the data paying particular attention to marginalized identity groups and the intersection of those groups
   b. Celebrate areas of strength and where improvement has occurred
   c. Acknowledge areas where there has been a decline or a consistent area of growth.
      i. Conduct a root cause analysis to understand the cause

6. Work collaboratively with team members to develop an intervention toward improving on a targeted set of goals by the next quarter

This recommendation stops short of holding senior staff members accountable for progress toward these goals. There are several reasons for this. First, the system currently incentivizes and supports progress toward goals not connected to this data. In order for individuals to be held accountable toward a goal, I strongly believe that they must have the resources and support, as well as clear incentives to adjust
their behavior that will lead to improved outcomes. The next implication addresses the support senior staff need in order to be held accountable for clear goals for an inclusive organization.

2) Build Capacity: Train senior leaders to develop skills to lead inclusively. Individuals who possess power and privilege based on their positionality as well as other identity markers, must be willing to build their equity lens in service of achieving an inclusive organization. Organizational inclusivity can be spearheaded and accelerated by the actions of leaders; however, those leaders must have a deep self-awareness of their identity and the ways that it impacts their decisions. Further these leaders must be willing to share their decision-making power and be willing to release the benefit they receive from being able to make decisions that are, oftentimes, unconsciously or consciously of greatest benefit to them.

As suggested by Bridwell-Mitchell, organizational relationship patterns are a channel for cultural norms and messages (2018). Prior to Home Teams, team members were loosely organized and their connections to each other varied in frequency and in strength. As a result, prior to the distributed leadership structure within the Home Teams, cultural messages varied in impact and content based on who individuals were formally connected with. The three formal ways that team members were previously connected were:

- Champions- Arranged between two Ed Firsters to serve as a sponsor/mentor role. Considerations for matching: leadership potential/interests; Meet monthly
- Buddies - Arranged relationships between two Ed Firsters to serve as a
mentor. Considerations for matching: demographic similarity, often by race/ethnicity and/or gender; Meet bi-weekly
- Project teams- Arranged often based on interests, skill sets, and availability.

The challenge with all of the patterns above is that many were not aligned to the daily work experience, particularly Champions and Buddies. This meant that a team member could engage with multiple individuals in the organization who have no formalized connection to each other, no consistent patterns of communication, nor consistency in content of message. The transition to the distributed leadership structure within Home Teams would change these patterns, thus greatly influencing cultural experiences and change.

As shown in Figure 20, the new Home Team structure yields a distributive leadership model that formally places Partners and Principals in decision-making roles for each of the consulting home teams, which are comprised of at least 10 junior consulting team members and Champions are aligned to individuals on that team as well. In the new Home Team structure, there are clear lines of consistent leadership for every Ed Firster. Specifically:

- Consulting Home Team Members all have a Champion, Principal and Partner for whom will lead their teams.
- Internal Team Members all have a Champion, who is also a Chief.

The new structure of consulting Home Teams has now distributed leadership across the firm in a more formalized way. The decision-making has become more decentralized and now lives more closely to team members and there is a greater responsibility for Partners, Chiefs, Principals, Champions, and
Home Team Strategy and Operations Leads to set the tone and culture for inclusiveness on these smaller teams.

The new leadership structure has also led to more diversity of those who have decision-making power. Most notable is the racial diversity of the leaders. The firm went from a team of Partners and Chiefs making the majority of the decisions, which is 38% people of color, to now individuals in distributed leadership roles, which is 50% people of color. Additionally, decisions are being made by individuals who are more closely connected to the people the decisions will impact. By creating this structure of shared leadership, the firm is ultimately diversifying the voices who makes decisions throughout the firm, both on the client-facing side of the work and internal decisions such as personnel selections and staffing team decisions. And while this diversity of decision-makers invites more voices into the decision-making process, it is not a guarantee that it will lead to a more inclusive culture.

**Figure 20: Distributive Leadership Chart**

<table>
<thead>
<tr>
<th>ROLE</th>
<th>CE John Luczak</th>
<th>ES Kelly James</th>
<th>EDI Bill Porter</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home Team Strategy and Operations Lead</td>
<td>Kate SullivanFrades</td>
<td>Cristina Munoz</td>
<td>James Liou</td>
</tr>
<tr>
<td></td>
<td>Irina Cortez</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Principals</td>
<td>Bill Horwath*</td>
<td>Emily Weiss*</td>
<td>Lisa Towne*</td>
</tr>
<tr>
<td>*Talent &amp; Quality Delivery and Champion of Sr. Consultants</td>
<td>Rashidah Lopez Morgan*</td>
<td>Ila Deshmukh Towery*</td>
<td>Anand</td>
</tr>
<tr>
<td></td>
<td>Sophie Lippincott Ferrer</td>
<td>Sarah Berg Margo Roen</td>
<td>Vaishnav* Peter Ross</td>
</tr>
<tr>
<td>Champion of Consultants</td>
<td>N/A</td>
<td></td>
<td>Heidi Guarino</td>
</tr>
<tr>
<td>Champion of Analysts</td>
<td>Priti Sanghani</td>
<td>Robert Medina</td>
<td>Carl Christopher</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Regina Riley</td>
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</tr>
</tbody>
</table>
It is also imperative that the leaders who are currently the decision-makers in the firm are supported and trained with building their lens for equity and challenged to grow in practice. These leaders should be held accountable by each other to engage authentically in the kind of emergent design and shared decision making that is an inevitable part of the ExD process. Building a common understanding of organizational inclusion amongst this new cadre of leaders in the firm can have a significant impact on the commitment and pace of Ed First to become a more inclusive organization. When leaders build their lens for equity, it increases the possibility that the diverse voices are actually heard and even validated. Further, it ensures that when decisions are made in the absence of a staff engagement process (as they often will be), the leaders at the table are well-equipped to make equity-driven decisions.

The new leadership structure creates a great opportunity to provide leadership training for those holding a leadership role at the firm. The Winters Group, a firm that provides coaching and education to organizations and leaders, offers a course, “Leading Inclusively: Head, Heart, and Hand,” which supports leaders and managers to examine “the role of cultural competence and emotional intelligence in creating environments where employees experience inclusion” (The Winters Group, 2019). Another option might be to re-engage with The Equity Lab and have leaders engage in an Equity Institute to “delve into their personal identities; learn listening skills, vocabulary, and other tools for engaging in race and equity work; and build relational trust with fellow attendees” (The Equity Lab, 2019).
This training may lead firm leadership to more clearly “articulate why the vision of RIDE is necessary for a for-profit firm to pursue the vision of becoming an equitable, diverse, and inclusive firm,” while also building the capacity of the Partner Team to consistently make decisions that are inclusive of all team members (King, 2018, p. 36).

Ultimately, Partners need to take the lead to continue their own individual growth, learning to be inclusive leaders. While Principals, who serve as a second tier of leaders in the firm, must also do the work of becoming equipped to lead with an equity lens, the Partners must also be ready to exhibit leader inclusiveness, which relates to an appreciation for the diverse contributions of all members, particularly in situations in which their input might not typically be attended to (Nembhard & Edmondson, 2006, p. 183).

Now that decision making is decentralized and transparently managed at the home team level, it is critical that these leaders are ready to accept and expect diverse voices. In order to do this, these leaders must be able to manage divergence in a way that ensures all voices are heard, and they must also productively lead the conversations back to convergence, when necessary, in order to move the work forward. It is important to note that not every concern or topic will achieve convergence, but rather the process of gathering authentic perspectives is critical. If done well, the leadership of each consulting Home Team may be in a position to increase the level of psychological safety, thus creating the conditions that are likely to increase inclusion in the organization.
3) Cede Power: Extend the purpose of the RIDE Braintrust to engage in shared decision-making. To continue on the journey towards becoming a more inclusive organization, Education First should make a commitment to create a formal structure to share power. To achieve this, a formal arm of the existing voluntary RIDE Braintrust could be created to serve in an advisory capacity for the organization’s RIDE Agenda and engage in the decision-making process as laid out by the ExD Decision-Making framework. This entity could be a mainstay in the organizational structure and will be more powerful than a high intensity short-term staff engagement process that the firm experienced in 2018 with the ExD workgroup and the Core Design Team (CDT). Further, the use of the ExD Decision-Making Framework will help to ensure that inclusive decision-making is a part of the process.

This arm of the RIDE Braintrust could be tasked to identify and address problems in the firm with transparency, fairness and equity. Through the application of Johnson’s “culture web” this group could help to elevate the collective values, norms and routines of the organization in service of beginning to refine specific policies and practices (1992). For instance, this group could address dimensions that the CDT did not get to fully explore such as Career Advancement.

This subgroup of RIDE Braintrust members should represent a diverse set of voices from the firm as well as the Chief People Officer (CPO) and the Founding Partner to elevate the significance and legitimacy of the group. Additionally, at least one senior leader who holds a distributive leadership role within a Home Teams
should be a part of the RIDE Braintrust as well. This will help to ensure that the
topics, issues and solutions discussed are always transparent to the executive
leadership team and representative of individuals in the firm. With this
conglomeration of individuals this group will also be able to maintain a firmwide
perspective of culture as well as be able to monitor trends across the various home
teams.

More diverse teams generate more ideas, consider more information and
make better decisions. However, the sharing of those ideas is most evident when
all members of the team feel included and valued. As a result, having a diverse
team alone is not enough. There must be systems, structures and culture in place
that supports the inclusion of various voices, especially those who have been
systematically marginalized within the system and otherwise. As such, one area that
will still need to be reconciled will be the use of the ExD Decision-Making
Framework. It will be necessary that all shared decision-makers have a clear
understanding of the purpose of the tool and how it is activated to address firmwide
problems and drive toward solutions.

More practically, the charge of the formal arm of the RIDE Braintrust could
be two-fold:

1. Consistently elevate and examine the daily experience of Ed Firsters
   a. Examine how valued competencies / messages unintentionally
discourage the time it takes to be inclusive. But also examine what
existing values/ competencies are present that support becoming
more inclusive and figure out a way to elevate those competencies in
the same way that competencies like GSD have been.
   b. Clarify the defining characteristics of an inclusive culture at Ed First
and determine the intentional efforts that will need to be made to
maintain this common Ed First culture that supports an overall inclusive organization as the firm moves into a home team structure where all staff are a part of one of the five distinctive home teams.

c. Review the Culture Survey and the Promise 54 Survey. Elevate the values, systems and assumptions of an organization via an Advisory Council so that they can be addressed.

d. Seek to understand the current reality of the experience of staff who are on the margins. Explore ways to increase and retain diversity of staff across all roles, specifically racial diversity in senior roles.

2. Consistently elevate and examine Ed First Systems, Structures and Processes

   a. Examine structural barriers that may inhibit full membership and participation.

   b. Examine the systems, structures and processes that need to be re-designed to be more inclusive and determine how best to measure the impact of those changes on inclusion to achieve the stated goals.

   c. Review and revise policies and structures using the new understanding of what inclusion really is.

Ultimately, this group would be a consistent structure to elevate the values, systems and assumptions of Education First and then be in a position to address these issues in service of becoming a more inclusive and equitable organization. As shown in Figure 21, this implication extends on the ExD work group recommendation to the firm in summer 2018 and could concretize the “sensors” and “transparency” desired.
This group will be well-positioned to take action in Partnership with the senior leaders of the firm to create a more inclusive culture at Ed First. As mentioned by a consulting team member in November 2018, “It’s not enough for everyone’s voices to be heard. But there must be a change as a result of that voice”. That change can be accomplished collectively with this group.

**Summary.** In order for inclusion to become a part of the fabric of the organization, Partners should commit to setting inclusion and other issues as RIDE as a part of its organizational bottom line in conjunction with “profit”. The firm’s leadership must build their capacity to lead with an equity lens and leverage the use of the distributive leadership model to share leadership. And, finally, the purpose of
the RIDE Braintrust should be extended to become an ongoing entity to support the development and implementation of inclusive practices. Implementing these three recommendations will allow the firm to move away from a mindset of dedicating a percentage of time that an individual may spend on issues of RIDE, but rather see that “RIDE is how we operate… and infused through all of our work,” as stated by the Chief People Officer.

**Implications for Sector**

The demographics of our nation’s students continue to shift rapidly and those who are in power—state education chiefs, superintendents, school leaders and teachers—do not demographically match the students being served. Not only are there more black and brown students educated in our public school systems than ever before, more students are identifying as LGBTQ, speaking a native language other than English and the poverty rate of students in some areas continue to rise (Bialki, et al., 2018; Digest of Education Statistics, 2013; Hodgkinson, 2000). However, unless structures and systems change to be more inclusive to begin with, the efforts of diversification alone will never create the wide-scale change that many students so desperately need. Education organizations across the sector should:

1. Build knowledge related to issues of race, inclusion, diversity and equity
2. Build awareness and a deep understanding of data related to race, inclusion, diversity and equity
3. Create equitable systems and structures to consistently share decision-making power across lines of diversity
Build knowledge related to issues of race, inclusion, diversity and equity. As our public schools in this nation become more diverse along many dimensions of identity, education organizations must get clear about the distinct differences between diversity, equity and inclusion. In a recent conversation with Dr. Annette Campbell Anderson, Associate Professor at John Hopkins University School Education who directs the School of Education’s Administration and Supervision program, it became clear that educators and those leading education organizations must also grapple with how to define the terms of equality, diversity, social justice, and equity and how each of these terms play a role in education. There must be an increased rigor of thought around these terms as well as stronger intentionality on the application of these terms to ensure that they are not used interchangeably and haphazardly and can be applied with fidelity to systems and structures.

Build awareness and a deep understanding of data related to race, inclusion, diversity and equity. Further, educational organizations must make a commitment to become more aware of the data related to issues of race, inclusion, diversity and equity by seeking out and monitoring data that matters. In most cases, educational organizations are not short on data, nor are they unfamiliar with how to use data to drive decisions. And while I hesitate to suggest yet another data point to measure, we know that what gets measured gets done. So perhaps this is about not only adding specific measures related to diversity and inclusion specifically, this is also about getting clear what measures matter the most and
which measures can be let go because they are not indicative of the outcomes that we truly seek.

**Create equitable systems and structures to consistently share decision-making power across lines of diversity.** Educational organizations across the sector must create formal structures that share decision making power with those who are most impacted, not just in a symbolic way, but in a way that truly provides them with the clout to influence and inform decisions. This will require leaders who do not demographically represent the people or the students for whom they are making decisions for, to open themselves to sharing leadership intentionally or even more radically stepping aside to make space for leadership that can be more reflective of the communities being served.

Ultimately, it is not just one action related to DEI that will lead to the changes for students of color, low-income students, and/or any other marginalized groups of students. A comprehensive strategy must be created and become a constant focus.

**Implications for Self**

It has now become clear to me that operating in my purpose is a non-negotiable, and I must have closer proximity to those who are making the greatest impact on students. When it comes to having a direct impact on students, my ambition is a powerful motivator to get things done. During the residency, my ambition to be “better” was lost because I did not see clearly what my ambition was in service of. I could not draw a line to the impact that I wanted to have for
students. For example, while I was clear that the process I led would help to improve the day-to-day experiences of Ed Firsters, I was not as clear how their improved experiences would translate to improved experiences for clients many of whom who are two to three steps removed from having a direct impact on students.

What was most apparent to me was that I was working for a for-profit firm who sought to balance financial sustainability with its mission to close the achievement gap. And yet, in my day-to-day experience at the firm, I rarely experienced how the work we were doing would change outcomes for students. This was in part due to my limited exposure to client work and the limited discussions about the impact that projects were having in the field. Had the mission impact been discussed at the same intervals that utilization and business development were discussed, I wonder how this would have impacted my perception. It is important to me to be able to see, hear and feel the impact on systems and children in a more direct way. I am more willing to be ambitious and work toward a goal with persistence if the end outcome of impact is clear to me.

No doubt Ed First plays a critical role in the education ecosystem by helping organizations to become better at how they impact outcomes for students. Every day, Ed First is supporting foundations, state education agencies, districts and other organization types to think about how they are organized to make a positive impact as well as helping to develop new ideas that will help to make a change for
schools, which will then impact students and teachers. However, that pathway to impact is simply too far away for me.

I recognize that I have been blessed with a gift and a passion to be closer to the nucleus of change. And while moving closer to the nucleus of change increases the level of complexity and at times chaos, it is a space that I not only feel most comfortable and most effective in, but more importantly a place where I believe that I can have the greatest impact for students of color and low-income students.

It is because of this experience that I am deeply committed to getting back closer to the nucleus of schools so that I can have a more direct impact on school leaders and teachers who are working with our students daily. I believe that the experience at Ed First has taught me lessons that will carry me through this next chapter of my career with even more clarity and fervor to influence and impact change at the systems level.
Conclusion

The journey to creating an inclusive organization requires an unearthing and acknowledgement of cultural norms that often challenge current notions of power and privilege of the majority. And yet, to meet the needs of the children in this nation, we must be committed to create organizations where not only all voices are heard, but also where processes, structures and systems are put in place that create inclusion as opposed to creating barriers.

In the past three years, Education First has made significant strides toward becoming a more inclusive organization. It has a more diverse staff and senior leadership team than it has ever had. Leadership has been distributed to team members who are closer to the work. And the firm is making strides toward implementing a new competency model that will evaluate one’s individual bias and inclusion.

While all of these steps are in moving in the right direction, the organizational commitment through a change in processes, structures and systems will ensure that inclusion does not become something that the organization just does, but rather what the organization is. As the firm shifts from RIDE being a specific learning agenda or initiative, they will find that every decision that is made at the firm can be made with a lens of inclusion, diversity and equity. In the beginning, it will take effort and it will take individuals speaking up constantly to hold decision-makers for making decisions in the spirit of inclusion. And as individuals continue their own individual journeys toward becoming more competent on issues of RIDE and there
is a system of accountability to monitor and support the actions in service of becoming a more inclusive organization, the work of becoming an inclusive organization will just be who Education First is.

Creating processes to ensure diverse perspectives is but one step, but yet a step that is so important. Educational organizations must become experts in creating the conditions for all voices to be heard and using those voices to tweak, redesign, and if necessary, disrupt the systems that continue to create barriers for students who are not of the majority group.
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Appendices

Appendix A. Blueprint 2018-2020, Guiding Objectives

**Using these inputs, the partners created five Blueprint objectives that draw a through-line from our past to our future**

<table>
<thead>
<tr>
<th>2018–2020 Guiding Objectives</th>
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<tr>
<td>1. Grow intentionally, rather than reactively, because we want to extend our impact and effectiveness in the field.</td>
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<tr>
<td>2. Strengthen our vibrant, inclusive, people-centric culture, so that our high-quality relationships flourish and our values thrive.</td>
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<tr>
<td>3. Build and maintain consistent, reliable ways to deliver with outstanding quality, so that we understand and increase the level of impact and client satisfaction.</td>
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<tr>
<td>4. Promote equity in public education and in our daily work firmwide by increasing our competence in issues of Race, Inclusion, Diversity and Equity (RIE).</td>
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<tr>
<td>5. Systematize processes and structures so that we have a mature and sustainable governance, management and growth strategy.</td>
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Appendix B: Pre-ASC Staff Engagement Email Template

We’re spending the bulk of next week’s ASC on eXd and insights on how the data suggests our operating model needs to shift. As we’ve said for the last several months, we are coming to the strong realization that our systems and structures need to evolve to support the scale and impact we want to achieve. I’d really value talking through some ideas more, getting your holistic feedback as well as personal feedback (like what personally excites and worries you about this direction). The attached deck is the draft e-read we are likely to send to the whole team this Friday (along with lots of eXd content).

If you have 15 minutes to scan these ~20 slides that help to synthesis what problem we are trying to solve/opportunity we are trying to seize before our call,
that will be great. If not, no problem at all. During the call, I’d like to walk through and get your feedback on additional draft content (still workshopping) that I’ll screen-share:

- Design principles for an updated operating model
- Early draft of design features for the operating model, including where the Rs and As (responsible and accountable, using RACI framework) might go for key functions

Towards the end of the pre-read are the feedback questions I hope we can cover on our call. Once we walk through the design features, I’m particularly interested in your perspectives on how the design features sit with you as you think about where you see yourself leading in the near term and next several years!

I grabbed us time for _________. I’m grateful for the space to kick ideas around get your feedback on multiple fronts—substance, messaging, and peering through an equity lens.

Talk to you soon,

Appendix C: Post-ASC Staff Engagement Email Template

Thank you for your engagement on the last ASC as we discussed eXd and insights on how the data suggests our operating model needs to shift. As shared on the call, we are eager and excited to begin designing our firm of the future and know that our most valuable resource are our staff who live and breathe the work every day. Throughout this process, we are committed to engaging staff in multiple ways. I am writing today to see if we can hop on the phone next week—a 30 minute call to discuss two very specific items related to the operating model:

- Of the six dimensions that are critical to our operating model, which features are most important? How should staff engage on said dimensions?
- Who should be accountable and responsible for what within the key operating features (RACI)?

The attached deck and slide below highlights the six dimensions that we see as critical to our operating model. It would be great if you could spend 10–15 minutes prior to the call to think about these two specific questions and think about any other questions that you may have related to this work. If not, no problem at all. In addition to discussing the items above, I’m particularly interested in your perspectives on how you see these changes impacting you and where you see yourself in the firm in the future.

I grabbed us time for _________. I’m grateful for the space and time to hear your perspective to and get your feedback, which will be synthesized and shared as we move the work forward.
Talk to you soon,

Appendix D: 1:1 Staff Engagement Data

Just before and following the ASC, we engaged two-thirds of our staff to gather feedback on which dimensions felt most important

- 3 optional Q & As attended by 32 staff
- 29 one-to-one feedback calls were held and one focus group with 6 of our new hires
- Role breakdown
  - 21% - Project Specialist/ Analysts/Managing Analyst
  - 36% - Consultant/ Senior Consultants
  - 13% - Principals
  - 19% - Internal
  - 11% - Partners
- Tenure breakdown
  - 15% - hired within the last 6 months
  - 32% - hired between 2016 – January 2018
  - 36% - hired between 2012 – 2015
  - 17% - hired pre-2012
- 40% were PoC and 50% were non-PoC
Appendix E: 2019 Priorities

Priority, Outcomes and Measures

INCREASING & MAXIMIZING OUR SALES, UTILIZATION & PROFITABILITY

OUTCOMES

1. Sell, work and collect $13.5M in revenue; 50% of 2020 sales under contract by year’s end
2. Manage overall expenses within the approved firm-wide budget (personnel and non-personnel)
3. Optimize utilization of available Ed Firster billable capacity and collaborator capacity to achieve $13.5M in billable revenue

Priority, Outcomes and Measures

STRENGTHENING TALENT DEVELOPMENT

OUTCOMES

1. Every Ed Firster is clear on The Deal (and the individual and team accountabilities and benefits and compensation in return)
2. Every Ed Firster is meeting expectations and demonstrating the mindsets and inclusive practices necessary to be effective in his/her role
3. Ed First staff and/or collaborator capacity exists and is assigned/optimized to deliver with quality on $13.5M
4. Ed First hires efficiently and effectively, maintaining goals and strategies for maintaining and growing a diverse team
5. The Ed First Talent organization is functionally strong and legally compliant
## Priority, Outcomes and Measures

### ROBUST & SCALABLE INFRASTRUCTURE THAT ENABLES OPERATIONAL EFFICIENCY

<table>
<thead>
<tr>
<th>OUTCOMES</th>
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<tbody>
<tr>
<td>1. Standard operating procedures (SOPs) and end-to-end workflows are defined and supported by technology solutions that make our processes more efficient; increase data accuracy, automates/streamlines reporting and information availability</td>
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<tr>
<td>2. Once adopted* and implemented, team members are trained and supported to confidently use technology tools that better match our virtual professional services organization and reduce their manual work</td>
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<tr>
<td>3. All Ed Firsters have access to the information they need to make effective decisions appropriate to their role in a timely, consistent and easily accessible way</td>
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## Priority, Outcomes and Measures

### ORGANIZATIONAL & HOME TEAM PERFORMANCE AND IMPACT

<table>
<thead>
<tr>
<th>OUTCOMES</th>
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<tbody>
<tr>
<td>1. Team members - internal and consulting team - report feeling more included and connected to one another, our work and the firm and that their overall experience (growth, development, joy and impact) is positive</td>
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<tr>
<td>2. The most essential progress is measured and reported on routinely at all levels of the organization (individual-team-org) and predictable, strategic conversations drive strategy adjustments or enhanced supports to improve performance (including: client feedback, team member feedback)</td>
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</table>
To strengthen our market position and firm culture, build a sustainable infrastructure and ensure meaningful impact on public education, we intend to focus on five priorities in 2019:

1. **Increasing & Maximizing Sales, Utilization & Profitability**
2. **Robust & Scalable Infrastructure that Enables Operational Efficiency**
3. **Strengthening Talent Development**
4. **Organizational & Home Team Performance Management**

With your help, we become an even stronger, more vibrant and inclusive firm.