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**Equity Environmental Scanning Tool (EEST) Guidebook**

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# Introduction

To provide societies with a DEI self-assessment tool, ACCESS+ has adapted the *Diversity and Progression Framework for Professional Societies* developed and used by the Science Council and the Royal Academy of Engineering from the United Kingdom. The resulting ACCESS+ DEI self-assessment tool for professional societies is called the *Equity Environmental Scanning Tool* (EEST).

The EEST is at the heart of the ACCESS+ theory of change to promote STEM society DEI culture reform. The EEST is intended to:

* Stimulate internal conversations,
* Assess and provide DEI performance benchmarks for future comparisons,
* Identify strengths and areas for improvement,
* Centralize data to inform reports and communications, and
* Provide direction for actionable changes.

## Why Complete a Self-Assessment?

We believe it is not only important that societies complete a DEI assessment, but that they do the work themselves. Certainly, societies can gain value from engaging external consultants or firms to assist in society DEI data collection and analysis; however, by conducting the assessment itself, the society ensures that all key constituents have bought into the value of disciplinary DEI, engage in collecting information, inform the “story” around the emerging data, vet and discuss conclusions drawn from the data, propose and engage in desired change, and evaluate and learn from the outcomes. Broad engagement builds ownership in the process, accountability to address identified areas of concern, and investment in changing traditional, or unexamined, ways of “being and doing” that have not resulted in inclusive disciplinary excellence.

# Completing the EEST

The EEST is divided into three parts, which are described on subsequent pages. It is recommended that at least two people representing different aspects of the society complete the EEST; and ideally, as many people as possible. The more diverse the input included in the data collection process, the more comprehensive and useful the EEST results will be. The following timeline represents the average amount of time that a society will need to work through the self-assessment and action planning process.

**Table 1: Proposed Timeline**

|  |  |
| --- | --- |
| Timeline |  |
| Months 1 - 2 | Determine who will be involved in the self-assessment team; ensure that all those who will be contributing know what is required. |
| Month 3 | Convene the self-assessment team; create a plan for completing the EEST self-assessment; ensure that enough time is allocated in consideration of all the people involved in the process. |
| Month 4 | Begin collecting the necessary data to complete the EEST |
| Months 5 - 7 | The self-assessment team should start completing the EEST. |
| Month 8 | Finish collecting raw quantitative and qualitative data. |
| Month 9 | Finalize completion of the EEST self-assessment. |
| Month 10 | Self-assessment team meets to review the results. |
| Month 11 | Share results with key constituents and receive input |
| Month 12 | Update self-assessment data as needed based on input from constituents; continue to host team meetings to finalize EEST results. |
| Months 13-16 | Create a draft DEI action plan, share it with constituents, and modify the DEI action plan as needed based on input from key constituents |
| Month 17 | Begin implementation of the DEI action plan. |

## Part 1: The 12 Functions

Part 1 of the EEST is organized according to 12 functional areas (functions) that are typical of Society operations. It is recognized that not all societies engage in all of the functional areas. Therefore, societies should only complete the Functions applicable to your society.

**Table 2: 12 Functions Titles & Descriptions**

|  |  |  |
| --- | --- | --- |
| Part | Title | Description |
| 1.1 | Governance & Leadership | Explores how DEI is integrated into the ethos of the society's leadership, how the society is governed, and how major decisions are made about its goals and activities. |
| 1.2 | Membership | Examines the design and delivery of the society’s membership activities, as well as the experience of its members. |
| 1.3 | Meetings, Conferences & Events | Identifies who participates, how, and what they experience during society meetings, conferences, and events. |
| 1.4 | Professional Development | Focuses on professional development opportunities, including “soft” skills in leadership and management, networking, and technical certifications/ licensure. |
| 1.5 | Chapters & Affiliates | Examines the support, development, and activities available for members in chapters. |
| 1.6 | Awards & Recognition | Reflects on the established application and selection policies and procedures by which people apply to, or are nominated for, awards and recognition. |
| 1.7 | Marketing & Communication | Considers how the society communicates with its members and stakeholders and the content that is communicated/marketed. |
| 1.8 | Community Outreach & Engagement | Explores how the society promotes and engages the wider community, public, and other stakeholders in the society’s sphere of influence. |
| 1.9 | Employment | Examines how employees are recruited, managed, and promoted in the society. |
| 1.10 | Public Policy & Advocacy | Focuses on how the society promotes and protects the interests of the discipline and its members. |
| 1.11 | Publishing | Explores how the society manages its publishing processes and produces official publications and journals. |
| 1.12 | Partners, Sponsors & Vendors | Considers how the society selects and works with partners, sponsors, and vendors. |

## 

## Sections

Within each of the 12 Functions, statements are organized into three sections. These sections are used to organize reporting and are valuable for planning and prioritizing actions.

**Table 3: Sections Titles and Descriptions**

|  |  |  |
| --- | --- | --- |
| **Section** | **Title** | **Description** |
| 1 | Management & Administration | The composition and preparation of leaders, and governance strategies employed by leaders, in each function of the society as related to DEI. |
| 2 | Policies, Procedures, & Practices | The day-to-day operations and enforcement of the policies, procedures, and practices in each function of the society as related to DEI. |
| 3 | Insights & Evaluation | The gathering and use of data within each function of the society as related to DEI. |

## Likert Scale Assessment

For each statement, you will assess if, and how, the case for DEI change is reflected in the operations of the society. A 5-point Likert Scale, from 0 = Never to 4 = Always, is used to guide responses (see table below). A “Not Applicable” option is available for statements that do not apply to your society.

Be sure to keep any source information for your decisions, including your interpretation of any terms (such as “leadership”). Doing this will help you and your colleagues ensure consistency and enable you to keep better track of your progress for the next time you complete the EEST.

**Table 4: Likert Scale Description**

|  |  |
| --- | --- |
| **Description** | **Level** |
| If your Professional Society does not undertake any activities related to this Function, then please select "Not Applicable". | N/A |
| No. DEI action is minimal to nonexistent. | 0 |
| Yes, rarely OR DEI action is still in the ideation/planning stages. | 1 |
| Yes, sometimes OR DEI action is being piloted. | 2 |
| Yes, often OR DEI action is being improved. | 3 |
| Yes, always OR DEI action is an established practice. | 4 |

## Part 2: DEI Compositional Measures

In Part 2 you are asked to provide information on a series of DEI performance measurement questions for each of the 12 functions covered in Part 1. These metrics primarily focus on “compositional” diversity as a starting point for consideration. Compositional diversity is the numerical and proportional representation of different groups of people within your organization and its activities. While representation is important, and lack of representation can serve as a signpost of underlying issues worth addressing, it should not be the only dimension of DEI that an organization seeks to develop.

To understand more about DEI in your organization, we also recommend collecting data on people's experiences, including barriers, opportunities, interactions, perspectives, and outcomes, in each of these areas in the organization. When paired with the other Parts of the EEST, you will gain a more comprehensive understanding of the structural, compositional, psychological, and behavioral dimensions of your organization related to DEI. We will cover this more in the ACCESS+ Community of Practice Meetings.

## Part 3: DEI Progress, Challenges, & Priorities

Part 3 provides the team completing the EEST with the opportunity to reflect on open-ended questions to identify areas of success and challenges; as well as reflection on intersectional strategies employed in society functions, and DEI priorities for the future.