

IREX Diversity, Equity, and Inclusion (DEI) Vision and Next Steps

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Purpose of this document

The purpose of this document is to underscore and clarify IREX's organizational commitment to DEI by laying out our vision, how we propose to reach that vision in a broad sense, who is responsible for various areas of effort, and the next set of actions we will take. This document reflects substantial contributions from IREX staff, which were shared in the Spectra survey, direct feedback to members of the Senior Management Team (SMT), and in the listening sessions held during November and December of 2020. It also incorporates feedback from the DEI Committee (DEIC).

Our vision

IREX is committed to enhancing diversity, equity, and inclusion (DEI) in our own organization and in our programs. **We will be an organization that attracts and retains the best talent; creates a culture that respects and embraces differences; and promotes values of diversity, equity, and inclusion our work.**

This commitment will require an all-IREX effort, backed by strong leadership. Together we will:

- Embrace principles of anti-racism and take active steps to fight racism by countering problematic language, attitudes, behaviors, policies, processes, and practices to ensure there is no place for racism at IREX.
- Hardwire DEI values into our institution and embed them into our policies, processes, practices, and approaches.
- Expect all IREX staff to uphold our values and hold ourselves accountable for doing so.
- Create spaces to discuss DEI, learn to understand, and address challenges.
- Create a transparent learning agenda and publicly measure our organizational progress.
- Invest in our team to ensure all of us have the language, understanding, and skills to truly create an inclusive culture.

We must all contribute through:

- **Accountability.** Everyone at IREX must take responsibility for their own actions, holding themselves and others accountable.
- **Respect.** Everyone at IREX will respect the rights and feelings of others, adjusting their own behavior as warranted.
- **Empathy.** Everyone at IREX will demonstrate concern with the health and well-being of colleagues, partners, and participants.
- **Transparency.** Everyone at IREX must commit to open, honest, and respectful communication.
- **Continuous improvement and learning.** Everyone at IREX will commit to a growth mindset and look for ways to be our best selves and help others to achieve the same.

We make this commitment because we believe in it deeply, because it is the right thing to do, because it will improve and deepen the impact of our work, and because it will enrich the experiences and perspectives of all who work for and with IREX. We recognize that if we strive to promote more just, prosperous, and inclusive societies in our work, we must also do more to address issues such as racism, bias, and non-inclusive behaviors at IREX.

Diversity has many dimensions and includes, but is not limited to, differences of race, ethnicity, religion, gender, gender identity, sexual orientation, age, nationality, and ability. It includes diversity of thought, background, and experience. We will embrace diversity in all its dimensions, recognizing the many intersectional elements of human identity. We recognize that the United States, which is where IREX is headquartered, carries a particular burden of structural racism. As such, we will pay special attention to racial injustice even as we strive to make IREX inclusive for staff of all backgrounds.

The journey to a more diverse, equitable, and inclusive IREX should be lasting, without an endpoint. Though we will ensure change happens, we understand transformational change will not happen overnight. And we know it must continue despite a broader social context that features racism, sexism, homophobia, and other forms of prejudice and bias we condemn.

How all IREXers will contribute

To achieve this vision of transformational change for our organization, we must adopt a systems approach that encompasses our people, our organizational culture, our institutional practices, our work, and our accountability to each other. At the heart of this effort is our organizational culture, which is an essential foundation for progress.

Recognizing that past progress has been slowed by unclear lines of responsibility and accountability, this document clarifies how responsibility and accountability will be treated going forward:

- **President and CEO** sets the overall DEI vision, strategy, resource allocation; ensures senior managers are held accountable for progress; and leads organizational communications on DEI.
- **Senior Management Team** is accountable for sustained progress toward meeting organizational DEI goals in their respective groups/practices/units.
- **All Managers at all levels** are accountable for implementing and modeling inclusive hiring and management practices.
- **All IREXers globally** are accountable for adhering to IREX DEI policies, processes, and practices and contributing to an inclusive organizational culture.

Our People: Because we know that a greater diversity of people and ideas will support our cultural shift and make us a stronger organization, IREX will:

- Purposefully increase representation by people of different races, ethnicities, religions, genders, gender identities, sexual orientations, nationalities, and abilities in our organization, placing special emphasis on positions of leadership, management, and decision-making. Increase diversity on the IREX board and global advisory council.
- Continue to strengthen equity in recruitment, advancement, and promotion, and expand mentorship and professional opportunities for people of color and across other dimensions of diversity.

- Invest in building the capabilities of staff to understand, work with, and supervise people who are different; invest in the capabilities of staff to lead and effectively work with, in, and across diverse teams.
- Hold all staff, and particularly managers, accountable for contributing to and creating a culture that celebrates differences in pursuit of our mission. Acknowledge conflicts when they arise and address them fairly, directly, and consistently.
- Create opportunities and safe spaces for staff to learn, openly discuss, and address challenges related to DEI.
- Devote sufficient time and resources to achieve these outcomes.

Our Practices: Because diversity, equity, and inclusion must be enduring values at IREX that translate into behaviors, mindsets, and decision-making, we must deeply embed them into our institutional fiber. IREX will:

- Ensure policies, processes, and practices across the organization reflect our organizational commitment to DEI.
- Translate our DEI commitment into systems that affect how we do our work including, but not limited to, performance management and procurement.
- Develop structured ways to assess DEI progress across multiple facets of our operations, including but not limited to hiring and retention, promotion, procurement. Collect and analyze data that provide objective indicators of how well we are translating our DEI commitment into reality.

Our Work: Because we believe that diversity, equity, and inclusion are fundamental to advancing just, prosperous, and inclusive societies around the world, we will design programs and develop funding proposals that enhance diversity, equity, and inclusion when interacting with partners, participants, and suppliers. IREX will:

- Identify, on a program-by-program basis, specific steps that program teams can take to incorporate DEI when executing their existing work plans. Across the portfolio of our work this will affect things like:
 - The design of program content and curricula,
 - Recruitment of participants,
 - Staffing and cultivation of technical expertise,
 - Elevation of alternative voices,
 - Monitoring and evaluation processes, and/or
 - Diversification in the firms from which we procure goods and services and in the consultants we hire.

Our Culture: Because we believe that our culture should embrace and advance diversity, equity, and inclusion, IREX will:

- Welcome people of diverse backgrounds, experiences, approaches, and ideas. Respect and celebrate their differences.
- Ensure every IREXer feels like a valued part of our team. Embrace the idea that diversity enriches culture and helps the organization evolve.
- Expect every IREXer to model respect and actively learn from the differences reflected in our team.

- Create regular opportunities to learn, discuss openly, and address challenges related to DEI at IREX and in our work.
- Proactively assesses progress, identify institutional obstacles to achieving greater DEI, and address them promptly and thoroughly.

Our Accountability to Each Other: Because we know that change requires a shared sense of responsibility and an honest evaluation of successes and failures, IREX will implement a system of meaningful support and metrics to track progress to hold ourselves accountable individually and as an institution. IREX will:

- Integrate DEI into all aspects of performance management. Provide clear expectations to all staff and hold them accountable. Give staff and managers the tools they need to succeed.
- Develop metrics, collect data, and track organizational progress related to different lines of effort, and publicly share this information when appropriate.

Theory of Change

Applying IREX’s “BASIC” theory of change, we believe that if all IREXers:

BUILD their capacity for diverse, equitable, and inclusive practices and gain the knowledge to contribute to DEI positively, then they will be able to

APPLY these practices within IREX and in their work outside of our organization. These practices will then

SPREAD to people in their networks, including throughout IREX. Through these actions, IREX will accomplish

CHANGE in becoming a diverse, equitable, inclusive, and anti-racist organization where our staff are able to improve the impact of our work, contribute positively to DEI and anti-racism in the development sector, and embody the change that we seek to advance through our programs.

Initial Action Items

The following table provides a list of specific action items and an approximate timeline. It is not exhaustive and will be added to over time.

Action	Person Responsible	Timeline
Inclusion coaching for All SMT members and other select managers across IREX	SMT members + other managers	July 2020 - present
Complete DEI assessment for non-US based staff	DEIC	February 2021
Capacity- building for all IREX staff: Unconscious Bias Training	DEIC + all IREX staff	Completed by June 2021

Develop job description for DEI director, DEI focal points, and roles and responsibilities for redesigned DEI committee	DEIC + HR + CEO	Completed by March 2021
Adopt DEI metrics and reporting method	DEIC + SMT	Completed by March 2021
Incorporate DEI into performance management process	HR + SMT	In process. To be finished by March 2021
Hire a DEI Director	CEO + HR/recruitment	TBD pending budget recast
Recruit and train DEI focal points	DEI Director	Summer 2021

How this vision will impact IREXers

- Organizational culture that truly reflects and is in alignment with our mission.
- A safe environment for everyone at IREX but specifically people of color.
- In-house DEI expert resource to address questions and share information.
- Greater creativity, insight, sensitivity, and effectiveness.
- More effective teams.
- Increased DEI understanding and skills.
- Greater application of DEI understanding and skills into practice.
- Social norm and behavior change.

Roles and Responsibilities

- **Overall DEI vision, strategy, and communications – Lead: President and CEO:**
 - Provide written vision for DEI at IREX, including desired outcomes and markers of success.
 - Identify clear roles and responsibilities.
 - Create a new DEI Director position to serve as expert advisor, coordinate IREX-wide DEI activities, convene and direct DEI Committee, and serve as DEI trainer and coach as appropriate.
 - Create new DEI focal points who will comprise the fixed-term DEI Committee (DEIC) and, after training, serve as resources, champions, and ambassadors to IREX units.
 - Develop new statement of purpose for DEIC and expectations for DEI focal points.
 - Ensure organizational workplans reflect commitment to DEI captured in this document.
 - Ensure EMT and SMT members advance DEI objectives within respective units, hold managers and staff accountable, and hire new managers and leaders who model desired behaviors.
 - Build capacity on DEI within IREX; partner with external experts to achieve this goal.
 - Communicate vision, strategy, and activities internally and externally.
 - Approve the new DEI roadmap, to be drafted by DEI director.

- **Sustained, institutionalized commitment to DEI -- Lead: Senior Director for Human Resources:**
 - Ensure all policies, processes, practices, and approaches reflect and advance DEI vision and strategy.
 - Ensure all recruitment and onboarding activities reflect DEI commitment and contribute to DEI vision and strategic objectives.
 - Advise new business development team and strategic partnerships unit on recruiting diverse candidate pools for project proposals.
 - Ensure equity in compensation, professional development opportunities, and all aspects of employee life at IREX.
 - Oversee and execute a multifaceted, all organizational strategy for DEI training and coaching:
 - Execute two-phase training for all HQ staff on DEI awareness and behavior change.
 - Execute new DEI training for all non-US based staff.
 - Develop and maintain additional DEI trainings as needed.
 - Manage targeted DEI coaching for IREX leaders and managers as appropriate.
 - Review and adapt training and coaching in response to structured assessments.
 - Maintain list of approved DEI trainers and coaches.
 - Ensure organizational accountability for achieving DEI vision, strategy, and objectives:
 - Individual accountability: HR to ensure DEI incorporated into performance management system.
 - Organizational accountability: HR to track, assess, and report on DEI progress.
 - Handle DEI concerns and monitor Navex whistleblower site.
 - Ensure regular opportunities for staff to learn, openly discuss, and address challenges related to DEI.
 - Provide advice, support, and oversight to Employee Resource Groups.
 - Oversee mentorship and sponsorship activities for staff as well as succession and talent pipeline planning (to be developed over time).
 - Educate IREX staff about HR's work to build DEI at IREX and incorporate best practices into all HR functions.

- **Accountability for inclusive hiring and management practices:**
 - Executives will be held accountable for advancing DEI objectives within their respective groups, holding managers and staff accountable, and hiring new staff, managers, and leaders who advance DEI objectives and model desired behaviors. They are also expected to contribute to advancing an overall culture, policies, practices, and approaches that advance DEI at IREX.
 - Senior managers will be held accountable for advancing DEI objectives within their respective units, holding managers and staff accountable, and hiring new staff, managers, and leaders who advance DEI objectives and model desired behaviors. They are also expected to contribute to advancing an overall culture, policies, practices, and approaches that advance DEI at IREX. They will themselves contribute to a culture that embraces DEI at IREX.
 - Managers will be held accountable for advancing DEI objectives within their respective teams: holding managers and staff accountable and hiring new managers and staff who advance DEI objectives and model desired behaviors. They will themselves contribute to a culture that embraces DEI at IREX.

- **Inclusive organizational culture (Lead: DEI Director Supported by DEI Committee):**
 - DEI Director, who reports to the President and CEO, to lead DEIC.

- DEI Director will create and oversee an organization-wide DEI learning agenda.
 - DEIC, under direction of the DEI director, will serve as DEI focal points -- ambassadors, champions, sounding boards, DEI “eyes and ears,” and resources -- within all major IREX operating units.
 - DEIC to create a unified calendar of events including a speaker series, heritage events, opportunities to share experiences and perspectives, and other DEI activities. This event calendar will ensure regular attention to DEI without overwhelming staff or competing for their attention. It will be synchronized with trainings and other IREX DEI efforts.
 - DEI Director and DEIC to maintain a library of resources, tools, and publications.
 - DEIC to review and provide feedback on organizational assessments.
 - DEIC to review and provide feedback on onboarding materials and process, with a DEI lens.
 - DEIC to review and provide feedback on DEI-related communications, from a staff perspective.
 - Conduct an inventory of existing D&I expertise at IREX and develop a plan to grow more expertise internally.
- **Integrate DEI into IREX budget process (Lead: CFO, Director for Budgeting, President & CEO, Senior Director for HR):**
 - CFO and Director for Budgeting should work with the President & CEO and the Senior Director for HR to develop a line-item budget for DEI, starting with the FY22 budget.
 - Separate the DEI budget from the general HR budget and track it separately. All time charged by the SDHR and the DDEI should sit in that budget, along with activity costs.
- ***Integrate DEI focus into programs (Lead: GP and SDG):***
 - GP to conduct assessment of which programs include or should include an enhanced focus on DEI.
 - GP to create shared resources (including materials and lists of speakers and trainers) that can be drawn on by program staff). GP and SDG to develop longer term strategy on how to better incorporate DEI into IREX programs and proposals.