

FIND THE RIGHT FIT: EDI CONSULTANT

Episode 13 of the *Work that Works* podcast talks about how a comprehensive, integrated, action-oriented and evidence-based approach to embedding inclusion in the workplace topples both structural and cultural barriers. There is no one-size-fits-all solution to inequality in the workplace. It takes many tools, initiatives and policies working in concert to move the dial on these important issues.

One part of your workplace’s action-oriented EDI plan may include hiring an EDI consultant. Before you begin the selection process, how do you know if an EDI consultant is right for you? How do you know if you need one at all? This step-by-step guide will help you navigate part of the decision-making process in assessing whether an EDI consultant is the right fit for your EDI plan.

Step 1: Identify the Why

Why is EDI important to your workplace?

1. _____
2. _____
3. _____

Step 2: Set Specific EDI Goals *(check all that apply)*

Strategy

- Collecting data
- Analyzing data
- Establishing baselines and benchmarks
- Identifying areas of risk
- Identifying areas of improvement
- Defining measurable goals
- Designing action plans to achieve goals
- Supporting/facilitating implementation of initiatives to achieve goals
- Driving change in organizational culture

Advisory

- On call guidance/support for next-steps in EDI initiatives
- Policy/Practice Review
- Consultations with leadership
- Public and internal statements concerning EDI policies and initiatives
- Resource Development
- Writing/Revising EDI Policies
- Investigations
- Developing Action Plans

Training / Education

- Training
 - What levels of the organization
 - Format (webinars, workshops, e-learning)
- Keynote Speakers - motivate commitment to organizational change

Talent Management

- Hiring/recruiting
- Assistance with ensuring all job descriptions are inclusive
- Recruiting/setting the stage for an internal EDI hire/team
- Retention
- Advancement

Coaching

- Individualized strategies to hone inclusive leadership skills
- Secure leadership buy-in
- One-on-one development sessions

Step 3: Prioritize EDI Goals

Tally the checked goals in Step 2 by category, to help identify the concentration of your organization's EDI needs. Assign a priority level for each category in accordance with your organization's strategic plan. The category with the highest priority level will help you select the right kind of EDI consultant to help you achieve your EDI goals.

Category	Tally	Assign Priority Level (out of 5)
Strategy		
Advisory		
Training/Education		
Talent Management		
Coaching		

Step 4: Identify Your Internal Strengths

Before reaching out to speak to an EDI consultant, take stock of your internal resources to determine which of the goals above could be advanced by your organization’s leaders, internal staff members and/or committees. These individuals or committees can collaborate with one another and/or with the EDI consultant to move the dial on these goals. When selecting these individuals, remember that inclusion is everyone’s responsibility, and it is not solely the job of employees most affected by barriers to help fix them.

Category	Leaders, Employees or Committees
Strategy	
Advisory	
Training/Education	
Talent Management	
Coaching	

Step 5: Scope of Engagement

If you decide that an EDI consultant can help advance your organization’s EDI goals, define the specific scope of engagement you are seeking: *(check all that apply)*

- Leading the initiative from start to finish
- Designing specific initiatives for pre-defined/measurable goals
- Providing support in implementing a pre-defined initiative
- Providing feedback/review of an existing policy/process
- On-call services for general guidance from time to time
- Incident response

Other _____

Step 6: Meeting with EDI Consultants in Your Identified Priority Area

Find an EDI specialist in the category prioritized in Step 3. Start the conversation identifying your specific EDI goals, needs and scope of engagement. Engage one or two key individuals identified in Step 4 to become involved in the selection process of an EDI consultant.