"Diversity, Equity and Inclusion (DEI) Cube" – DEI Maturity Model for Social Impact Organisations

Why a new DEI Maturity Model?

At The Social Investment Consultancy (TSIC), we have been working with social impact organisations – funders, impact investors, charities and social enterprises – to advance their diversity, equity and inclusion (DEI). Recognising not only the business case of DEI for better organisational decision-making, but that DEI is inherently linked to the pursuit of fairness, equality and social justice. In the past few years, a lot of social impact organisations have embarked on their DEI journeys. We have found through research that existing DEI maturity assessment often comes from an HR/leadership perspective, assumes linear growth in maturity, or lacks insights on the purpose-driven nature of the social impact space. DEI models specific to the social impact space tend to focus on the grant-making or programmatic aspects but not the holistic organisation and culture.
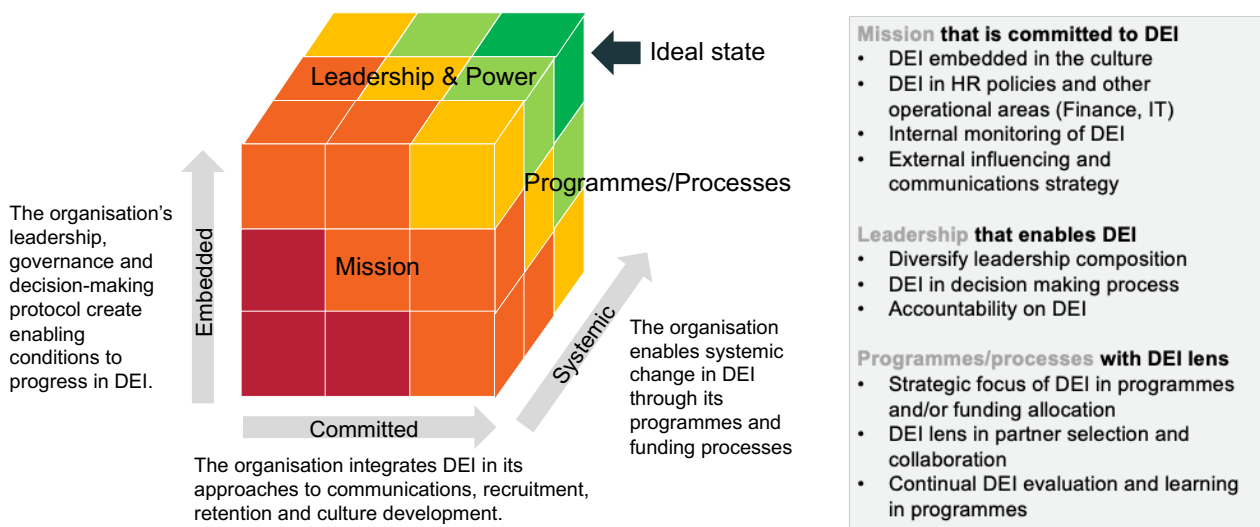
The sector could benefit from a DEI Maturity Model, that better reflects the context of creating social change, shows the non-linear nature of DEI progress, and covers different areas of social impact work.

What is the DEI Maturity Model for Social Impact Organisations?

The DEI Maturity Model for Social Impact Organisations is inspired by
- Rockefeller Philanthropy Advisors' The Philanthropy Framework, which visualises how philanthropy operates.
- The National Committee for Responsive Philanthropy (NCPR)'s The Power Move assessment tool, which looks across how philanthropy can embrace DEI in various aspects.

While these are tailored for philanthropy, they are generally applicable to the broader social impact context. The DEI Maturity Model for Social Impact Organisations is called the "DEI Cube", and assesses DEI maturity across three dimensions, as shown and defined below:

Mission that is committed to DEI
- DEI embedded in the culture
- DEI in HR policies and other operational areas (Finance, IT)
- Internal monitoring of DEI
- External influencing and communications strategy

Leadership that enables DEI
- Diversify leadership composition
- DEI in decision making process
- Accountability on DEI

Programmes/processes with DEI lens
- Strategic focus of DEI in programmes and/or funding allocation
- DEI lens in partner selection and collaboration
- Continual DEI evaluation and learning in programmes

The organisation's leadership, governance and decision-making protocol create enabling conditions to progress in DEI.

The organisation enables systemic change in DEI through its programmes and funding processes

The organisation integrates DEI in its approaches to communications, recruitment, retention and culture development.

Structuring the model as a three-dimensional cube reflects the complex nature of progress on DEI – it is not a linear path, and there are many interlocking elements. "Advanced" in terms of DEI looks like the following:

- **Committed** (x-axis) tracks the progress of an organisation's **mission**. "Good" is that the organisation strives to embed DEI in its culture, by communicating extensively about DEI within the organisation, having comprehensive DEI policies, and developing an overarching DEI plan with clear goals, strategies and indicators of progress.
- **Embedded** (y-axis) speaks to the changes at the **leadership** (**power** holders') level. "Good" is that the organisation has a diverse representation at the leadership and/or senior management level (in terms of diverse protected characteristics[1] and intersectionality[2]), decisions are made in an equitable and inclusive manner, and there is accountability at the top on DEI commitments.
- **Systemic** (z-axis) reflects the integration of DEI in an organisation's **programmes/ processes**. "Good" is that the organisation implements DEI throughout everything they do. Depending on the organisation, programmes and processes can mean differently, such as advocacy programmes, frontline programmes, investment processes, grantmaking processes, etc.

Progress on one dimension does not mean the organisation is well on its way to DEI. For example, an organisation that does well on its *mission* (i.e. highly *committed*) but not on the other two dimensions, would score 'orange' (i.e. *just started*, as shown below and in the cube), as they still have to progress holistically.

Not started	Just started	Moving along	Well on their way	Advanced

In each dimension, organisations can assess their states of maturity using the list of questions below. Please note that the list of questions is a starting point, and we welcome suggestions.

Mission	Leadership and Power	Programmes/processes
Goals: Do we have EDI goals? **Policies:** Do we have a DEI policy(ies)? **Strategy:** Do we have a DEI strategy and plan? **Monitoring:** Do we have approaches to monitoring our own DEI progress? **Communication:** Do we communicate DEI to our internal and external stakeholders?	**Competency:** Do we provide DEI training to our board, leadership team and staff? **Representation:** How diverse is our board and leadership team? Does it reflect the communities we work with? **Governance and Culture:** Do our team members all feel included in our governance structure and decision-making process? **Accountability:** Do we have a structure to hold ourselves accountable to DEI?	**Programme:** Is DEI systematically assessed and integral in programme/process design and delivery? **Resources:** Are resources responsibly allocated to DEI practices in our programmes/processes? **Data:** Do we collect data to understand our DEI practices? **Improvement:** Do we implement our learnings to improve DEI in our programmes/ processes?

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[1] https://www.equalityhumanrights.com/en/equality-act/protected-characteristics
[2] https://www.gov.scot/publications/using-intersectionality-understand-structural-inequality-scotland-evidence-synthesis/pages/3/

The Social Investment Consultancy