

The Power of Measurement Evaluating the Impact of DEI Programs with Dr. Lisa Marie Lee

Announcer: You're listening to the HR Mixtape Your podcast with the perfect mix of practical advice, thought-provoking interviews, and stories that just hit different so that work doesn't have to feel, well, like work. Now, your host, Shari Simpson.

Shari Simpson: Joining me today is Dr. Lisa Marie Lee, the founder of Linked Results LLC, specializing in people, culture, and operations solutions to drive business impact. With a PhD in education and experience in the U.S. Navy, corporate, and government sectors, she focuses on enhancing organizational performance through a human-centered approach.

Shari Simpson: Dr. Lee, thank you so much for sitting down with me today.

Dr. Lisa Marie Lee: Yes, thank you for having me. I'm so excited to be here.

Shari Simpson: So you have an interesting story from where you started out. We were just talking a little bit about your Navy career, but I want to talk about the work you're doing now and what really drew you into this idea of using data as the key element in evaluating our DEI initiatives.

Dr. Lisa Marie Lee: I think it really just started in while I was in the military, while I was in the Navy, and everything was calculated, everything was documented. And so I understood at that time, I viewed it, oh, this is just information. But you know, in the professional world, it's not just information, it's data. So in the military aspect, it's information. We're going to always track it. We're always going to go back and look at it. We're always reevaluating what's going on. We're counting everything. We're allotting for everything. And it specifically was behaviors because I was a cook. So it's how people are acting towards the food that we're cooking. Do they want to eat it? Do they not want to eat it? Why don't they want to eat it? So it was just the understanding of how measurement is necessary. and understanding how people feel and understanding the outcomes for a cook, which is people eating the food. You know, that's the outcome. The goal is to build morale through food. And so that's where I really, really understood the importance of data and what it means when it comes to the human experience. And I recognized that and I wanted to find a way to make that a career. And what did that look like? How did that align? And obviously it's HR, right? But I didn't really, when I got out of the Navy, it was kind of like, maybe I wasn't explaining it right or whatever, because I was still new. And it just made it seem like I didn't know what I was talking about. People just didn't really understand it, you know, but now I understand now it's data analytics and all of that. So that was really my driving force for it and just building on it.

Shari Simpson: That's so cool. As you've been doing this work, how has it shaped your approach to looking at some of the barriers that we experience in DEI, things like performance improvement?

Dr. Lisa Marie Lee: I think the main thing is, is us being willing to truly tap into understanding how someone feels and not being afraid of how that may make you feel, you know? And so it's just the perception of it and the emotion that comes from it and all the behaviors and the feelings and all of those things. I think that's the biggest barrier, right? Whether it's fear, hate, you know, or someone that's willing to want to help and engage. And I think that it's just the human behaviors of resistance and people recognizing what that really is. And even though they may feel that they're not resisting, then then accepting that that's what it is and not be afraid to accept that. And so the key word fear.

Shari Simpson: Yeah, I'm amazed at how many times I've had conversations with either friends or family members and I've pointed out something that they've said or a way that they've acted that hasn't been the most culturally responsive way of behaving. And I get one of two reactions, usually. It's defense, right, and fear that I'm putting them in a corner or saying that they fit in a bucket. Or there's that other side, which is, oh, wow, I didn't know that information, or I didn't know I was coming across as that, or that wasn't my intent. Thank you for letting me know. And I'm amazed at just the difference in response and how that impacts the workplace. You know, I think about with your background and things that I've been doing recently when it comes to my own education. And I wanted to ask you about Kirkpatrick's model specifically, because I think that's really interesting when you link it to things like DEI initiatives and impact. So maybe you could walk us through a little bit about, you know, how that model, how you see that model impacting with those things.

Dr. Lisa Marie Lee: Yes, the Kirkpatrick Four Levels of Evaluation. It's based off of empirical research and study and information regarding adult learning theory and also human performance improvement and an understanding of what motivates performance. So really the psychology of the workplace, you know, and the understanding of how we learn and how we learn in our willingness, because it starts out with level one focusing on reaction. So reaction, if we positively perceive something, we're going to be motivated to learn it, right? or if we perceive it to be beneficial for us, we're going to want to engage with it. And if we want to learn it, engage with it, then we're going to be more motivated and even have the confidence, really, to actually use that information and use that training. And then if we're willing to use that information and that training policy, whatever it is, then We should have the desired outcome that we're looking for what is expected, you know, and and then that having a not only a positive impact, but a return on impact return on investment impact. And that's really what it's all about, you know, and it may not seem like. that is necessary or should be or not even really thought of as an approach for a DEI because I think we kind of just think we're going to just change the world, you know, one inspiration at a time. But we have to measure that change and understand if it's actually occurring. You know, we can say, oh, I'm creating anti-racist workplaces and things

like that. But how do you know that? You know, how do we really know that? Yes, we see people who are motivated by the trainings and we know it's good and we know it's necessary and we know it's essential. but we have to be able to demonstrate why it is, you know, because we woke up this morning into a new world, a world that we thought wasn't going to happen. And now it's important and imperative now more than ever for us to be able to demonstrate the worthiness of DEI, not just on a human aspect and the experience of it, as we said, as we just spoke, we can experience one thing and someone can experience something totally different. So then it just seems as if it isn't real. But if we're able to link it and show the dollar value, sadly, we have to show the worth. We got to show the dollar value because that's what drives our society. You know, we live in a society where money rules.

Shari Simpson: Yeah. You know, this work, I think when you think about the analytics of it, I think some people go to the big bucket items, right? What does our ethnicity look like? What does our gender parity look like? You know, our age groups, those kinds of things. But that's not all of the data we should be looking at, right? That's a base level, right? Those are the table stakes. Yes, you need to be looking at that stuff. But from your perspective in this work, Take us to that next level. Walk me through what we should be measuring that, you know, as you've talked to people, you realize there's so much out there that people aren't evaluating.

Dr. Lisa Marie Lee: I just think we need to just truly have an understanding of how people feel, really. I mean, those measurements of having people within a space those don't guarantee that we all feel the same things and that we all believe the same things. So I just think that us as advocates and just professionals, we truly need to have a true understanding of how everyone is feeling within the workspace. I mean, everyone comes in, we're wearing a mask, right? And so someone can say they feel a certain way, but they may not really feel that way. And then it comes out in their actions. So it's the monitoring of behaviors and truly ensuring accountability of those behaviors. So it's that aspect, right? And then there's also the true in-depth engagement to ensure understanding. And once we have an understanding, then we know if there's an alignment. And if there's an alignment, then we should reach the goals that we're desiring and working towards. So it's just a long process. It's hard work, you know, it's not just the implementation and the constant trying to change the world from that aspect, but the engagement of it as well. And I think that's the hardest part within workspaces, especially, you know, with the gust coming out of, I don't like to say pre-COVID, but you know, the idea of it and the fear of it. And it's created this new world where we kind of move off to ourselves, right? And so even that makes it harder for us to engage. And, you know, some may feel, well, now we have people that work from home and all that. No, that's not going to stop you from engaging. You just have to figure out what works for your business. And not every business is the same. So you as a leader, whatever your approach, For you reaching out and building

relationships, that's key.

Shari Simpson: So how do you collect that data? So I'm going to use two examples from what you just said. So there's the one example of the leader having the conversations. I kind of think of like focus group style conversations. But then there's the other thing you talked about where you are putting out programs that you know as an HR person, they're going to be effective and are important. And you can gather things like NPS scores and that kind of stuff from the raw data. How do you get into those deeper kind of behavioral questions? Do you have some examples maybe you could share for our listeners?

Dr. Lisa Marie Lee: I think, you know, allowing everyone to track their own behavior, you know, and then allowing them to be open through however you choose to measure it. I know every business has their own approach, but allowing them to track their own behavior and then explain in their own way, however you try to set up a design system for that. But I like action planning and, not you as the HR professional doing the action planning, but letting the individuals do it themselves and letting them recognize where they may fall short. And they don't have to share that information, you know what I mean? But they can be open and honest about if they feel something is beneficial. So that aspect, you would want to engage based off that. But as far as them being accountable for their own actions, I think that that has been really beneficial with people that I've worked with because HR already is kind of like the police, you know, so you want to take that, take a step back from that approach because the trust factor might be a little hindered depending on the environments. People may not want to, may not even know, you know, that there is a trust issue. So even that helps to build trust, right? Because we're allowing the engagement for them to think about how they can be better and improve. And me as well, and us as well, right? We're all doing this together. Everyone, not just them, but all of us having our own action plans and then engaging. So it could be even like a whole discussion around it. creating like a forum or an approach like that where everyone, if they choose to be open and honest and they step up. And I think that that could be a good way to implement us all and empower everyone within a business to take on that leadership step and format and engage in that way.

Shari Simpson: How have you seen those individual action plans, if they're not being shared broadly, start to impact DEI programs? That's a tricky one.

Dr. Lisa Marie Lee: You know, because it is, you know, everyone has to do the work. And there's a lot of pushback when it comes to justifying DEI, you know, and that hinders the buy in. So that's why I wanted to step into this lane for that. And so that's something I'm still trying to figure out, actually. Yeah. And so, like I mentioned, with everyone being engaged and being willing to do the work, And so I'm just trying to highlight and spotlight on that because I recognize that that's what's needed because I may not have really truly focused on the DEI approach, but I know human behavior and I've worked with on other avenues, you know, and so I understand that that's what's needed.

Shari Simpson: So I'm just highlighting. No, I think that's great. I think, you know, I think the more broad perspective we can have on human behaviors and how we quantify and qualify the data that we're collecting, how we look at things like engagement surveys differently and how we extract from that, you know, the data that we need to justify our DEI programs, I think it's really important, especially now, as we've talked about, you know, just the changes that we've seen in the DEI landscape in the last 12 months, right? So we do have to continue to go back to data to show the ROI for our businesses. You know, what are some common pitfalls you see organizations take when they're trying to measure DEI impact?

Dr. Lisa Marie Lee: They're just pretty much looking at just training. And then once the training is implemented, they have this assumption that we're going to have an increase in whatever we're measuring. It doesn't work that way. Training does not guarantee change. And that's another reason why buy-in is hard as well. And then a statistic, I think it's less than 20% of managers even think DEI is effective because they don't think that behavioral change will occur. And why is it that change isn't occurring? Well, we don't know if we're not evaluating. Right. It could be so many reasons. It could be just, you know, down to just it's not working because of how the training is being implemented or just people learn it and then they move on from it. Right. There's so many reasons or new investments and new policies and procedures that have been implemented and they're counterproductive. to DEI. So that's the disconnect and understanding why there is that gap in the desired result. And you can't get mad if you're not willing to invest in understanding why. So. That's where we, as advocates, have to step up and demonstrate we have to understand the why to be able to justify the how.

Shari Simpson: I had a great conversation earlier today with somebody, and we were talking about his consulting work around this space. And one of the things he shared was kind of a similar conversation he has with leaders when they say things like, well, we've checked the box, or we've done this, or we've done that, and they don't want to do any more initiatives. And he starts to ask them, well, tell me why. Where's that coming from? Like, what do you if she isn't? He didn't really use the word fear on purpose, I think, in that conversation. But it's to get to that behavioral thing as to, you know, what is the narrative that they're they're telling themselves about their environment, the workplace, their personal bias, whatever it is. So it's important to be able to do that. And one of those things is, you know, making sure that you have psychological safety, which we won't get into that here. But that's so important if you want to have those types of honest conversations. You know, how do you think I think things like technology and the advancement in AI are having an impact on some of the things that we look at from a data perspective for our DEI initiatives.

Dr. Lisa Marie Lee: I think that from my approach as a researcher, it makes the process easier, you know, and like I have my own evaluation chat bot. And I made it through the Zapier app. It's free. I didn't

have to go and invest and get all crazy with it. And it's allowed me to be better. So I think that that's where we need to tap in. And I think it also helps to bring up a new discussion for other people so that if they're afraid to come forward with their own concerns or fears or whatever, there's an avenue for them to do that. You know, and I think that that helps as well because that's probably one reason why people disengage from the process, because there's so many different fears around it and they don't want to address that. That's why I was mentioning earlier with action planning, those types of, you know, diary type systems where people can just do it on their own. So with the new tech advances, it kind of opens the avenue for that. And there's so many different apps and chats and things. I mean, businesses are creating their own. I made my own. I mean, it's so easy nowadays. We just have to figure out how we, us as leaders, are going to utilize it, you know, to really build connection, to strengthen the human experience.

Shari Simpson: Well, and I think there's the interesting component of what you said about marrying the tech with an experience. You know, something that we do in our training is we have this text box that's built into the, you know, the LMS as you're going through it. And it'll be like, you know, reflect on this section. And I always kind of thought that was like, okay, a waste of time, you know, because as HR professionals, we see a lot of training. But when I changed my own perspective on it, I was like, well, this actually does give me a minute to pause, think about what I just read. And I'll remember because I'm articulating it back from my experience and how it resonates with me and not just going through it. checking the box, putting it in a cabinet, it's done, my training's done. So it's such a unique approach. You know, as we wrap up our conversation and you think about, you know, all the companies you've been talking about, your research background, what advice do you have for organizations just starting out to begin to implement, you know, a real data-driven approach to DEI?

Dr. Lisa Marie Lee: You don't have to overly invest. You know, it's, you could do it for free. It's not hard. We just got done speaking about that. And I think also outside of that, it's just taking the human approach. It's just being human and looking at others as humans and not being afraid to have conversation and dialogue. And I think that that's the real key, regardless if you're using tech or not, you know.

Shari Simpson: Awesome. Well, Dr. Ali, thank you so much for this great conversation and the work you're doing in this space to help let people know about data-driven DEI initiatives. So I appreciate you sitting down with me. My pleasure. Thank you.

Dr. Lisa Marie Lee: I hope you enjoyed today's episode.

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