DIVERSITY AND INCLUSION FOR SMALL AND INDEPENDENT BREWERIES

Assessing Your Efforts

The fifth resource in a five-part series

PURPOSE

The purpose of this document is to provide considerations for Brewers Association (BA) members who wish to develop useful assessment tools for diversity and inclusion goals. The adage "what gets measured gets managed" summarizes the importance of assessment in day-to-day operations and in broader efforts to achieve long-term goals. Therefore, the efforts of organizations working toward the related goals of being more inclusive and expanding diversity should be sustained, actively managed, and accurately assessed.

BUILDING ON A SOLID FOUNDATION

The first document in this series, *Laying the Groundwork,* provided a number of strategic steps for BA members to consider when initially pursuing diversity and inclusion goals. This document builds upon three of those initial steps. In order to create useful tools for assessing the effectiveness of diversity and inclusion efforts, make sure you have first accomplished the following:

- Developed a definition of diversity that is specific to your geographical location and organizational culture;
- Created a responsibility structure that is tasked with managing diversity and inclusion efforts; and
- Identified assessable diversity and inclusion goals that are aligned with other existing organizational goals.

INITIAL CONSIDERATIONS

For the purpose of this document, the term *diversity* refers to variety in the demographic makeup of the people who produce, distribute, and enjoy craft beer. While current data reveals that certain demographic groups are nearly universally underrepresented in the industry, small and independent brewers are encouraged to develop an organizationally-specific definition of diversity. Because of the uniqueness of these definitions, there is no such thing as a "one-size-fits-all" approach to cultivating diversity. In the same vein, assessment tools should be tailored to individual breweries, their specific understanding of diversity, and their unique diversity and inclusion goals.

Why Should I Assess?

Serious commitment to any business goal involves a means of measuring success; diversity and inclusion goals are no different. Assessment tools—which small and independent brewers can use to evaluate the effectiveness of their efforts—are important for a number of specific reasons. Assessment tools:

- Reveal what is and (perhaps more importantly) what is not working.
- Promote efficiency in allocating time and resources.
- Help ensure that organizational efforts are goal-directed.
- Support results with impact.

When Should I Assess?

The timing of an assessment is generally determined by its purpose. An organization might use an assessment tool in any of the following occasions:

When Establishing Baselines – A brewery may perform an assessment before implementing diversity and inclusion efforts. Doing so helps to identify the areas of greatest opportunity and evaluate the investment of resources required. Moreover, knowing where you've started is essential for accurately measuring progress.

When Performing Maintenance and Troubleshooting – A brewery may perform an assessment while executing diversity and inclusion efforts. Doing so allows you to monitor progress and make rapid adjustments when needed.

Upon Completing an Initiative or Effort – A brewery may perform an assessment *at the conclusion* of a specific effort or initiative, providing an opportunity to take stock and collect information.

When Engaging in Benchmarking - Assessment *at regular intervals* is an effective means of conducting benchmarking (comparison to best practices, indicators, competitors, etc.).

Who Should Conduct Assessments?

Experts agree: if you want to effect change in an organization, it isn't enough to simply announce a new policy. You have to appoint responsibility for managing the change.[1] This is why creating a *responsibility structure* is an important step before attempting to create assessment tools. Assessment should be one of the primary charges of your responsibility structure—whether in the form of a diversity officer, task force or committee, or a living document. By conducting assessments and sharing the results, responsibility structures keep the focus on tracking success and quickly and efficiently changing course when adjustments are needed.

ASSESSMENT APPROACHES

This document will provide a number of strategic approaches to creating assessment tools for efforts to make the most of three areas of opportunity for small and independent breweries to be inclusive and expand diversity—*fans*, *hands*, and *brands*. While the approaches to creating assessment tools discussed below represent a range of options for brewers to consider, they are in no way exhaustive. Importantly, however, they share a common set of features that are necessary components of any useful assessment tool.

Goal – A tactical goal defined within the organization.

Outcome – A result that can be observed and measured that helps to achieve a strategic goal. There may be more than one outcome for a single strategic goal.

Measure – A means of assessing an outcome.

Target – The benchmark that defines success for an outcome.

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[1] Dobbin, Frank, and Alexandra Kalev. 2014. "Why Firms Need Diversity Managers and Task Forces". Pp. 170-198 in *How Global Migration Changes the Workforce Diversity Equation*, edited by M. Pilati, H. Sheikh, C. Tilly, and F. Sperotti. Newcastle: Cambridge Scholars Publishing

How to Set Targets

For organizations that are new to implementing diversity and inclusion efforts, knowing how to set realistic targets might be difficult. Performing initial benchmarking may be a helpful process. Consider the following:

- **Internal benchmarking** – Comparing diversity and inclusion efforts to similar processes inside the organization.
- **Competitive benchmarking** – Comparing diversity and inclusion efforts to those of a competitor in the marketplace.
- **Functional benchmarking** – Comparing similar or identical practices within the same or similar functions outside the immediate industry.

Assessing Diversity Goals for Your Fans

Fans are the people who enjoy craft beer, whether in a brewery taproom, at a restaurant or other retailer, or in the comfort of their homes. For most small and independent breweries, it is impractical, resource intensive, and potentially invasive to collect detailed demographic information about your fans. Moreover, "quota" approaches to diversity and inclusion are often misguided and may lead to exclusive and even exploitative practices. It is often more practical and equitable to assess diversity via secondary indicators.

Examples:

	Geographic Reach	**Event Planning**	**Consumer Education**
Goal	Cultivate new markets that expand the diversity of our brewery's fans.	Cultivate new markets that expand the diversity of our brewery's fans.	Cultivate new markets that expand the diversity of our brewery's fans.
Outcome	New sales accounts to be established in geographic locations that have greater demographic diversity.	The brewery will partner with community organizations for select on-premise events that will bring new customers into the brewery.	The brewery will organize or sponsor tasting events aimed at introducing craft beer to a higher age bracket.
Measure	The number of new accounts established in areas meeting specified criteria.[2]	The number of successful partnerships that result in stable or increased average taproom sales.	The number of people who attend tasting events organized in collaboration with local active adult communities.
Target	Three sustainable new accounts per year.	Two partnered events per quarter; at least one will result in increased taproom sales.	200 unique event attendees per year.

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[2] TIP: The American FactFinder (https://factfinder.census.gov), maintained by the U.S. Census Bureau, provides demographic data and population characteristics about geographic units as small as census tracts.

Assessing Diversity Goals for Your Hands

Hands are the people who are involved in the process of producing, distributing, and serving craft beer. Unlike the assessment of fans, brewery leadership may be more hands-on in collecting information directly from their labor force. While it's easy to focus narrowly on the makeup of any given workforce, it's important to see a wide range of assessable indicators of success.

Examples:

	Recruitment	Retention	Mobility
Goal	Cultivate a diversity of people, perspectives, experiences, and skills in our brewery's labor force.	Cultivate a diversity of people, perspectives, experiences, and skills in our brewery's labor force.	Cultivate a diversity of people, perspectives, experiences, and skills in our brewery's labor force.
Outcome	Brewery staff will reflect the demographic diversity of the surrounding community.	The brewery's internal culture will be welcoming and supportive for all employees.	Demographic diversity is not only realized for the brewery labor force as a whole, but for each area of operation.
Measure	The number of applicants from the community in which the brewery is imbedded will be increased via job fairs.	Periodic anonymous surveys will be used to gauge employee perceptions of the brewery's internal culture.	Opportunities for advancement and cross-training are extended to all employees equitably.
Target	Increase average applicant pool for brewery openings by 25 percent.	Survey scores will reflect an 80 percent or higher satisfaction rate.	All employees are offered the opportunity to learn about other areas of the brewery's operations through two annual "internal exchange program" days.

Assessing Diversity Goals for Your Brand

Brands include a range of messages, images, and activities that shape customers' perceptions of your product and your organization. Your brand includes your marketing and events, packaging and signage, social media presence, and more.

Examples:

	Social Media	Philanthropy	Face Time
Goal	Expand the overall reach of our brand, connecting our brand values to similar values in diverse communities across the region.	Expand the overall reach of our brand, connecting our brand values to similar values in diverse communities across the region.	Expand the overall reach of our brand, connecting our brand values to similar values in diverse communities across the region.
Outcome	Extend the reach of our social media messaging through "values-first" channels.	The brewery will form and sustain relationships with organizations that support and celebrate underrepresented communities via its donation program.	The brewery will be a community leader in creating opportunities for girls and women.
Measure	Boost the reach of our Instagram and Facebook messaging through strategic cross-posting with nonprofit organizations that share the brewery's mission to support veterans.	A portion of keg donations will be reserved for cultural heritage festivals and events.	The brewery will commit time and expertise to local events supporting women's entrepreneurship and STEM careers for girls.
Target	Use the #FollowFriday hashtag on the brewery's social media properties each Friday to highlight veteran-centered organizations and partnerships.	The brewery will have a beer and brand presence at three public cultural heritage events each year.	The brewery will donate 100 employee hours annually.

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