



**DIVERSITY . EQUITY . BELONGING . INCLUSION**

# **STRATEGIC PLAN**

SEPTEMBER 2024

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## DEBI STRATEGIC PLAN

***This Strategic Plan** is a comprehensive five-year plan for short and long-term improvements to the Willamette Valley Wineries Association (WVWA) organizational and industry member culture, whereby prospective employees, current employees, Business Diversity Pledge Signatories (Signatories), suppliers of professional goods and services, distributors, and additional community and industry stakeholders including guests and visitors, are assured of: a) WVWA’s commitment to the values of diversity, equity, belonging, and inclusion (DEBI) in all aspects of how work is conducted; and b) WVWA’s accountability to the related action steps identified herein to advance the organization and its Signatories and members in the daily pursuit of the WVWA’s mission. This Strategic Plan establishes a baseline of employee awareness and engagement about DEBI issues and identifies goals to improve organizational culture, cohesion, innovation, productivity, and longevity.*

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## WVWA ORGANIZATIONAL OVERVIEW

**The mission** of the WVWA is to promote, preserve, and advance the prestige of Oregon's Willamette Valley AVA and its wines by engaging our members and supporting our community and environment.

**The vision** of the WVWA is that the Willamette Valley AVA is universally recognized as the premier winegrowing region, celebrating our preeminence in Pinot Noir and growing vibrant diversity.

WVWA membership resources enable the following **strategic priorities** in support of this mission:

- **Consumer & Trade Promotion:** Create awareness of and preference for Willamette Valley AVA wines
- **Tourism Promotion:** Increase wine-focused visitation, live or digital, to the Willamette Valley AVA
- **Environmental Stewardship:** Dedicated to the goal that our wines are crafted utilizing sustainable practices from vine to glass
- **Community Support:** Enhance the health and wellbeing of the winegrowing community in the Willamette Valley
- **Advocacy:** Monitor Federal, state, and local issues, inform members, and collaborate on advocacy on behalf of WVWA

Our organization's success factors are:

- **Branding:** Promote a clear and consistent brand of Willamette Valley AVA wines and the region
- **Membership:** Deliver member education across diverse business models and foster engagement
- **Industry Collaboration:** Increase efficiency and effectiveness of initiatives by working with other organizations
- **Diversity, Equity, Belonging, and Inclusion:** Incorporated into all WVWA programs

## WVWA DEBI PLAN CONTRIBUTORS

This section is intended to recognize and express appreciation for the extraordinary contributions to the development of this five-year strategic plan which is the culmination of four years of learning and level-setting.

In 2019 the WVWA formed the Diversity, Equity, Belonging and Inclusion (DEBI) Taskforce with the stated goal to advocate for belonging through the creation of diverse, inclusive, and equitable opportunities for our members, trade, and consumer audiences. Since then, this taskforce developed an equity tool kit and a pledge that includes actionable and accountable steps Signatory wine businesses have agreed to take toward inclusivity and equity in the workplace and beyond. As an organization, we have bolstered our resolve and affirmed Dr. Martin Luther King, Jr.'s "fierce urgency of now." While we know that achieving systemic equity—embedding DEBI into the WVWA and Members' organizational DNA—is a long-distance run, we are sprinting toward things we can reach quickly: difficult dialogues, training, coaching, stakeholder counsel, and the creation of this actionable DEBI strategic plan.

In 2022 we enlisted the services of Diamond Strategies Consultants to assess our DEBI work and mentor the DEBI Taskforce—now the DEBI Council—in the creation of this strategic plan. The WVWA exists to serve its peers and meet the needs of our industry. To do this well, we must first understand, serve, and meet the diverse needs of our winegrowing community. This strategic plan is a major step toward this goal.

A work product of this magnitude requires robust participation and input from everyone associated with WVWA. The list is too long to identify each contributor by name. Hearty appreciation is therefore extended to every one of the following groups:

- WVWA Board of Directors
- Strategic Plan Workgroups—all four focus areas
- Everyone who completed the voluntary June 2022 DEBI Survey (201 respondents)
- Every leader, DEBI Council member, and Business Diversity Pledge Signatory who provided input, via one-on-one interviews, regarding DEBI in WVWA and the wine industry
- All anonymous persons who supplied the preparers of this plan with authentic and sage counsel
- Education partners and professional vendors of goods and services for providing feedback
- Professional Services Consultants Diamond Strategies, LLC: Matthew Whitaker, Ph.D., Cornell University, DEI Executive Certified

SECTION I-A STATEMENT OF COMMITMENT

A MESSAGE FROM THE BOARD OF DIRECTORS

**“We believe that cultivating a diverse and inclusive community supports our team, customers, and partners. We believe that wine, like life well-lived, should be authentic, complex, and balanced. We believe that sharing wine is communal and that the bridge it forms surpasses differences. We believe that we are inevitably tied to our land, seasons, and community- it is our responsibility to leave them in a better place for our children.”**

ET FILLE WINERY

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**“Sharing a glass of wine is treating someone like family and we invite you to our table. We reject and actively oppose the reputation of wine as exclusive or excluding anyone. All are welcome at Elk Cove and we do not discriminate on the basis of race, color, national origin, sex, disability, religion, creed, age, marital status, sexual orientation, gender identity, and socioeconomic status.”**

ELK COVE VINEYARDS

*The Board of Directors (Board) is pleased to present this charter version of the FY23-FY27 WVWA Diversity, Equity, Belonging, and Inclusion (DEBI) Strategic Plan. When the WVWA Board initially approved the creation of the DEBI Taskforce in 2019, dedicating the necessary energy, time, and resources for the development of a best-of-class DEBI program, this strategic plan was envisioned as a compass to guide us into new territory and opportunities for our ever-evolving organization and industry. The WVWA Board introduces this DEBI Strategic Plan to the WVWA community, our Business Diversity Pledge Signatories (Signatories), trade partners and stakeholders for attaining the goals of a diverse, equitable, and inclusive association, representative of the best of our industry, inclusive of all people, and charged with the pursuit of belonging and excellence for all.*

2023 BOARD OF DIRECTORS - EXECUTIVE COMMITTEE

<i>Kate Norris (President) Division Wine Company</i>	<i>Rob Alstrin (Secretary/Treasurer) Adelsheim Vineyard</i>
<i>Ben Casteel (Vice President) Bethel Heights</i>	<i>Jessica Mozeico (Emeritus) Et Fille Wines</i>

2023 BOARD OF DIRECTORS

<i>Page Knudsen Cowles Knudsen Vineyards</i>	<i>Jeff Lewis Alexana Winery</i>	<i>Jean Baptiste Rivail Ponzi Vineyards</i>
<i>Jessica Endsworth Hyland Estates</i>	<i>Aaron Lieberman Iris Vineyards</i>	<i>Scott Shull Raptor Ridge Winery</i>
<i>Matt Farver Jackson Family Wines</i>	<i>Anna Matzinger Matzinger Davies</i>	<i>Sofia Torres Cramoisi Vineyard</i>
<i>Michelle Kaufmann Stoller Wine Group</i>	<i>Rebecca Oliver Lemelson Vineyards</i>	
<i>Bryan Laing Hazelfern Cellars</i>	<i>Sarah Pearson Dobbles Family Estate</i>	

SECTION I-B STATEMENT OF COMMITMENT

DEBI COUNCIL STATEMENT OF COMMITMENT

<i>Page Knudsen Cowles Knudsen Vineyards</i>	<i>Courtney Cunningham Glint Creative</i>	<i>Ximena Orrego Atticus Wine</i>	<i>Scott Shull Raptor Ridge Winery</i>
<i>Michelle Wasner Seufert Winery</i>	<i>Julie Dalrymple WVWA Team</i>	<i>Athena Pappas Boedecker Cellars</i>	<i>Annie Shull Raptor Ridge Winery</i>
<i>Jessica Mozeico Et Fille Wines</i>	<i>Megan Markel WVWA Team</i>	<i>Aaron Lieberman Iris Vineyards</i>	<i>Bill Sweat Winderlea Vineyard</i>
<i>Ben Casteel Bethel Heights Vineyard</i>	<i>Rebecca Oliver Wine By Joe</i>	<i>Emily Petterson EKP Media</i>	<i>Sarah Pearson Dobbles Family Estate</i>

*The Willamette Valley Wineries Association (WVWA) strives to leverage the diversity of our members and Signatories, our service and supply partners, and our consumers, to provide services in alignment with organizational values: We believe the experiences, perspectives, and talents of all Oregonians are our greatest strengths. Racism, antisemitism, xenophobia, homophobia, and bigotry of any kind will not be tolerated, and we pledge to be vocal allies in the fight for equity. It is our ardent belief that while Oregon is still a region of discovery and has much to share with the world, its greatest attribute is our expansive community dedicated to a diverse, vibrant future for our state. We share that vision and invite all to join us as we work toward fulfilling it.*

*We fulfill our mission by learning about, exploring, addressing, educating, and responding to the unique needs of our members, Signatories, and communities. We commit ourselves to empathetic listening, embracing unique backgrounds and perspectives, and by promoting appreciation of others. We accomplish this by advancing an aware, inclusive, equitable, and supportive environment, where employees can be their true selves, and by modeling the ideal behaviors, such as being present, listening, embracing, and channeling discomfort with change, into actions that build awareness, cohesion, and productivity.*

SECTION I-D STATEMENT OF COMMITMENT

*Specifically:*

- 1. Senior leadership is committed and engaged,*
- 2. Use of data, metrics, and assessment guides our work,*
- 3. Recruitment and development of talent is a top priority,*
- 4. Impact is local, but our vision is global,*
- 5. Efforts are connected: Signatories, committees, stakeholders and WVWA members,*
- 6. Belief that DEBI requires long-term, ongoing efforts guided by strategic planning.*
- 7. WVWA's DEBI Council is a joint-WVWA leadership/Signatory partnership with its purpose to provide critical input to decision-makers on the overall direction of DEBI programming and strategic directives. The DEBI Council is a communication conduit for feedback and further serves Signatories and industry partners, by providing suggestions and recommendations to senior leadership for DEBI growth. The goal of our shared DEBI work is to provide for the betterment of our culture, so that everyone is afforded what they need to maximize their potential and service to our dynamic and ever-evolving community.*

WVWA ORGANIZATIONAL DEBI GOAL

*Oregon's wine community embraces all that makes this place special. We see our values reflected in the dedicated work of farmers, vineyard stewards, winemakers, sales teams, and thousands of other skilled professionals who call this industry home. Our region and nation's reckoning with inequity have brought attention to Oregon and call on us to recommit to a deeply valued aspect of life here: diversity, equity, belonging, and inclusion.*

*Circumstances also demand that we thoroughly and thoughtfully reassert our principles of respect and inclusivity in our work. As wine industry organizations representing stakeholders across the state, we recognize the power of our platforms and our potential to help build an equitable, thriving Oregon wine industry that in turn contributes to an equitable, thriving Oregon. The state remains firmly invested in ensuring Oregon is a safe and welcoming place for all to live, work and visit.*

*In partnership with our tourism, culinary, and hospitality industry colleagues in Oregon we want to leave no doubt that we welcome everyone who wants to explore and enjoy our state. It is our ardent belief that while Oregon is still a region of discovery, we believe the experiences, perspectives, and talents of all Oregonians are our greatest strengths. The WVWA and its allied wine associations throughout discovery have much to share with the world. Believing Oregon's greatest attribute is our expansive community dedicated to a diverse, vibrant future. We share that vision and invite all to join us as we work toward fulfilling it.*

## SECTION I-D STATEMENT OF COMMITMENT

### DATA COLLECTION & ASSESSMENT

WVWA's overall DEBI effort was expedited by professional services consultant Diamond Strategies, LLC, beginning in 2022.<sup>1</sup> They conducted rigorous data collection of employee lifecycle statistics, employee input (including exit interviews), vendor feedback, policy and procedure documents, internal and external announcement and publications, programs information, and employee survey data. Diamond Strategies then utilized comprehensive assessment methodology to derive a data-driven understanding of WVWA needs. The People Company [a professional services consulting firm who specializes in Diversity, Equity, and Inclusion (DEI)] reminds us of the following:

"D&I assessment (Diversity & Inclusion) is a process for obtaining valid data and information about the performance of an organization on key D&I factors. Assessment is a critical step to long-term success, as it provides a data-driven understanding of organizational current state around D&I. It facilitates identifying opportunities to deepen D&I commitment and guide decisions around planning and resourcing. It also establishes a baseline from which to celebrate what is working well."<sup>2</sup>

## SECTION I-E STATEMENT OF COMMITMENT

### STRATEGIC STATEMENT

#### PURPOSE

Inspire the WVWA community to create cultures of diversity, equity, belonging, and inclusion for employees, customers, suppliers, and partners by providing tools and improving access to WVWA programs.

#### VISION

The WVWA wine community creates diversity, equity, belonging, and inclusion for all employee, consumer, and trade audiences to reflect the growing diversity of the United States general population.

### STRATEGIC THEMES

#### **1. Change our mindsets to diversify and equitize our outcomes.**

**a.** Provide resource materials, reading and discussion groups, trainings, and other experiential learning opportunities to educate our community on the history, conditions, issues, and experiences of the underrepresented.

**b.** Advance understanding in these areas to foster more cohesive, inclusive, and innovative workplace environments. This will, in turn, increase productivity, sales, and the financial sustainability of individual businesses and the wine community at large.

#### **2. Enhance our mix of employees and suppliers.**

**a.** With changed minds, our community will want to diversify our staff, suppliers, and customers to reflect the growing diversity of the United States general population.

**b.** Elements will include recruitment, hiring, mentoring, advancement, and retention practices to attract new employees, customers, and marketplaces.

#### **3. Attract new customers and reach new marketplaces.**

**a.** More inclusive mindsets and workforces will appeal to more diverse customers and foster new perspectives.

## SECTION I-E STATEMENT OF COMMITMENT

### STRATEGIC OBJECTIVES

#### PURPOSE

*Inspire the WVWA community to create cultures of diversity, equity, belonging, and inclusion for employees, customers, suppliers, and partners by providing tools and improving access to WVWA programs.*

#### VISION

*The WVWA wine community creates diversity, equity, belonging, and inclusion for all employee, consumer, and trade audiences to reflect the growing diversity of the United States general population.*

#### STRATEGIC THEMES

- 1. Leadership:** *Inspire, inform, mentor, and motivate wine community leaders to foster a positive culture of diversity, equity, belonging, and inclusion.*
- 2. Employee Lifecycle:** *Recruit, retain and advance a more diverse population at all levels.*
- 3. Communication:** *Develop and implement a comprehensive and consistent internal and external communication plan that showcases a culture of diversity, equity, belonging and inclusion.*
- 4. Education and Outreach:** *Create and promote at individual, interpersonal and systemic levels to:*
  - *Recruit more Signatories by modeling the benefits of DEBI.*
  - *Recognize and highlight DEBI best practices in business accountability.*
  - *Create and maintain a training pathway with curated materials that advances knowledge and sensitivity.*
  - *Host and collaborate on signature events that inspire and advance DEBI.*

## SECTION I-E STATEMENT OF COMMITMENT

### THREE TO FIVE YEAR PRIORITIES

*Between 2023 and 2028, the Willamette Valley wine community will have made diversity, equity, belonging, and inclusion for employees, trade, and consumer audiences a cornerstone of our culture and processes, as measured by each segment's demographics.*

*More specifically, our priorities include:*

- 1. Demonstrate** *the business case for DEBI – 2023-2024*
- 2. Create and maintain** *Standard Operating Procedures (SOPs) as reference documents and best practice examples that are shared with our members – 2024-2028*
- 3. Advocate** *for pay equity through annual salary surveys, workshops, and discussion groups – 2024-2028*
- 4. Highlight the pathways to make** *the Willamette Valley wine community more accessible to underrepresented communities – 2024-2028*
- 5. Showcase** *the Willamette Valley wine country as a welcoming and inclusive place – 2023-2028*

#### LOOKING FORWARD

*The WVWA leadership is committed to making DEBI an explicit organizational and community priority.*

*DEBI work is not a stand-alone effort, but an integral part of on-going organizational and community excellence. Our priorities as outlined in our Strategic Plan are to help Willamette Valley wine community businesses actively integrate DEBI into operations, employee experiences, and business culture.*

*Timelines, metrics, and performance reporting will be key components to ensure this work moves forward, progress is achieved, and revisions are made as needed. Our efforts will be proactive and responsive to our industry's evolving business needs, demographics shifts, technological advances, and the unique needs of our employees and the communities we serve.*

SECTION II EXECUTIVE SUMMARY

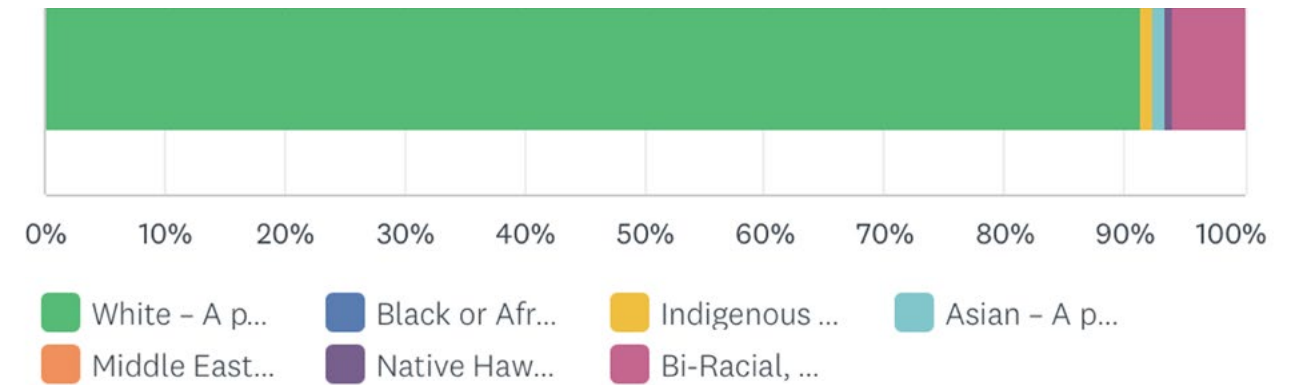
SUMMARY OF FINDINGS

The following information represents the aggregate information and data gleaned from: 1) one-on-one interviews with WVWA staff, DEBI Council members, Board of directors, and Signatories; 2) our DEBI survey; 3) industry best practices, and 3) Oregon and national demographic and pay equity data. Results from the March 2022 DEBI Survey (Appendix A) indicated strong employee support for WVWA’s DEBI efforts. From the respondents (201— 160 responses were required to produce a statistically viable report), 93% support WVWA’s goal to pursue organizational excellence through diversity, inclusivity, leadership, and professionalism. 91% agreed DEBI is important to them. 79% would participate in voluntary diversity and inclusion training. 69% agreed they know the actual benefits of a diverse and inclusive workforce.

EMPLOYEE DEMOGRAPHICS	MAJORITY GROUP
RACE	WHITE - 91%
GENDER IDENTITY	FEMALE - 65%
AGE RANGE	30 to 49 - 56%
SEXUAL ORIENTATION	HETEROSEXUAL - 81%
RELIGIOUS AFFILIATION	AGNOSTIC or ATHEIST - 34%
DIFFERENTLY ABLED	ABLE-BODIED - 89%
LANGUAGE PROFICIENCY	MONOLINGUAL - 71%
MARITAL STATUS	MARRIED - 71%
VETERAN STATUS OR AFFILIATION	3%
NEUROLOGICALLY DIVERSE	11%

Additional metrics indicated areas of needed growth. From the respondents, 56% agreed they could voice a differing opinion in the workplace without fear of negative consequences. Just 44% agreed there is open and honest interpersonal communication within the WVWA. 53% agreed all employees are treated fairly at WVWA and 53% agreed or neither agreed or disagreed that WVWA was already sufficiently diverse and inclusive. Strategic Plan Section V titled Data and Analysis provides responses to all 30 quantitative questions.

A snapshot of WVWA employee demographics in a few of the dimensions of human diversity:



Assessment data also revealed themes of reported obstacles to an inclusive environment in the WVWA and among our signatories.

- Lack of staff in critical areas
- Poor vertical/horizontal communication
- Lack of trust
- Low morale among some supervisors
- Fear of speaking up and retaliation
- Resistance to change
- Transactional culture v. relational culture
- Work silos
- Cliquishness and favoritism
- Bias (conscious/explicit and unconscious/implicit)
- Micro-aggressions and micro-insults

Data-driven insights informed the consultant’s recommended strategies that can achieve real and lasting change. Specifically, the data collection and assessment identified four Strategic Plan focus areas. The DEBI Committee affirmed the four focus areas.



WVWA-comprised workgroups were formed by approximately two-dozen WVWA Signatories and staff members, self-selecting to the workgroup they were most interested in and/or had the highest expertise. These volunteers represented a diversity of demographics, duties, and rank. In consultation with Diamond Strategies, they formulated action steps and desired outcomes. The DEBI Council reviewed their recommendations and provided additional input. Finally, all WVWA employees were provided opportunities for input in the assessment and access to the strategic planning process.



## SUMMARY OF RECOMMENDATIONS

*A summary of the specific goal recommendations for the four focus areas in this Strategic Plan are identified below. This Plan is a living document, intended to be proactive and responsive to WVWA's evolving business needs, demographics shifts, technological advances, and the understanding of the unique needs of the WVWA organization, member, and Signatory employees and the community served.*

## TIMELINE

*The revised, crystalized, and expanded recommendations made by the workgroups assigned to each of the four focus areas impact WVWA at four distinct and interwoven levels:*

- 1. individual;*
- 2. institutional (rules, protocols, policies, procedures, and regulations);*
- 3. programmatic; and*
- 4. culture (common set of beliefs/behaviors, often unspoken).*

*Work within all four levels will happen simultaneously with each level supporting the others as this Strategic Plan builds upon itself.<sup>3</sup> More importantly, the assessment urged WVWA to set DEBI goals in response to these recommendations, to create accountability and enable the organization to increase follow-through. The FY23-FY28 WVWA DEBI Plan Timeline Chart (Appendix A) provides detail on the general timeline of each goal's objectives, actions, metrics, owner/driver, start year, and end year.*

*As an iterative process, revisions are to be expected. The first year will likely include further information-gathering to learn of specific obstacles, established best practices, and foundational needs to support progress. For example, reported obstacles to a desired WVWA supplier diversity program, include the need for a vendor registration system, evaluation of additional procurement processes and resources, and improvements of the general procurement process. To make progress, WVWA will align staff performance expectations with DEBI goals. This will help identify additional resources needed to meet those expectations.*

## LEADERSHIP DEVELOPMENT

*The deliverable for this focus area is to define what Leadership within WVWA is, as well as to communicate what our measurements of success will be.*

*Unless otherwise specified, "Leadership" or "Leaders" in this Plan refers to the following: WVWA Board of Directors, WVWA Executive Director and employees, and extends to leaders within the Willamette Valley wine industry, including managers, department heads, supervisors, business owners, and Signatories.*

- We will encourage, but not force anyone to be a WVWA Pledge Signatory.*
- Ultimately, our goal is to ensure that DEBI is part of WVWA members businesses' value-set and informs organizational practices.*
- We want to ensure that WVWA member leaders understand the need to commit to the DEBI effort and ensure that they are communicating, motivating, supporting and developing employees within their organization.*
- Primary measurement of success will be through annual quantitative online and qualitative interview surveys that the Leadership Development team will develop in Q1 of 2024.*
  - Survey will include questions of all WVWA Leaders' business practices as aligned with the DEBI pledge, as well as some questions from our baseline survey to see how demographics/metrics are evolving.*
  - Questions will address WVWA business practices around training, hiring/retention, and showcasing diversity of workforce and clientele*
  - Outcomes of the survey will help in the development of future strategic plans, as well as help in the development of business cases to showcase successes.*
- Secondly, success will be measured by the number of Signatories and % of membership who have signed.*

## EMPLOYEE LIFECYCLE

**Guidelines for Employers Regarding Employee Lifecycle**

*The deliverable for this focus area is to provide Employers with a toolkit to help with recruitment, hiring, onboarding, and retention of candidates and employees from a multitude of backgrounds and a variety of experiences, including examples of best practices and/or lists of resources. We intend this to enhance DEBI consciousness and help make it a part of each Employer's business practices.*

## SECTION II EXECUTIVE SUMMARY

*These Employer guidelines are offered to WVWA Members and Business Diversity Pledge Signatories and are recommendations tailored to various stages of the employee experience.*

*We believe that employees will see the benefits of an inclusive culture to their day-to-day work experience when these guidelines are implemented and followed. This focus area group will develop metrics to track success for the following goals:*

- *There is increased employee morale*
- *There is trust in management and colleagues*
- *There is more interaction across departments and among WVWA members*
- *There is a break from a past practice (that's the way we've always done it) mindset*

### RECRUITMENT

#### **Employee population reflects national population community**

- *Research and find data that describes our national population's characteristics*

#### **Research and provide information about workforce development organizations to attract diverse candidates. - 2024**

- *Identify and provide examples of these organizations -*
  - . *e.g. Roots Fund - employment recruitment "board"*
  - . *Message Board at Our Legacy Harvested*
  - . *Additional resources, URLs, etc*
- *Employers are encouraged to refer to the list in order to forge targeted relationships*

### HIRING

#### **Encourage employers to create a document that describes a philosophical approach to hiring so that employees, applicants, and stakeholders have confidence in the hiring process: how you recruit, where you recruit, what your job descriptions look like, etc.**

- *Build relationships with potential stakeholders who can help expand applicant pool - Identify Stakeholders, then establish timeline (see above)*
- *Consider developing and hosting a career/job fair. Research in 2024 the steps needed to establish this as a possibility*

## SECTION II EXECUTIVE SUMMARY

### ONBOARDING

#### **Employers need to feel grounded and prepared for the conversation with candidates from a multitude of backgrounds and a variety of experiences. Onboarding is the employer's responsibility.**

*Onboarding needs to consider infrastructure needs and policies/practices that promote cohesion, camaraderie, and effective navigation of difference.*

*Develop a list of topics that are covered during a positive onboarding session and consider using third party resources for inspiration*

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### COMMUNICATION

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#### **January 30, 2024**

1. *In Collaboration with the Education and Outreach Committee, develop a process for gathering and vetting education resources for the existing web toolkit. Include in Communications Plan*
2. *Develop a semi-annual practice for reviewing the Toolkit for validity, relevance, broken links, etc.*

#### **February 1, 2024**

1. *Create a one page document within the communications plan that explains what the WVWA DEBI Council is and is not.*

#### **March 31, 2024**

1. *Create and Share a Communications Calendar with the DEBI Council that includes all deliverables.*
2. *Define a practice for informative sharing via spotlighting member employees, training, celebrations, team building, etc.*
3. *Create a piece for Willamette Valley stakeholders that identifies DEBI Council members and that describes what we do, why we do it, that we are committed to being embedded in our community, and that we are available to support their efforts.*
4. *Create a one page document that explains what the WVWA DEBI Council is and is not.*
5. *Collaborate with other DEBI committees and support their work with appropriate communications.*
6. *Work with the DEBI Council to establish a DEBI lens; a framework by which opportunities are assessed and communications are expressed.*

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**EDUCATION & OUTREACH**


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WVWA and our members and Signatories advance and sustain cultures of DEBI to transform the WVWA and the greater wine industry into exemplars of DEBI. By providing a comprehensive and repeatable DEBI education and training plan, we ensure that the following goals are met:

- A battery of regular training initiatives that connect current events and needs to historical events and processes; from individual experiences to institutional policies and practices, represented in programmatic offerings and eventually reflected in the culture of the WVWA as it evolves. Courses that have been offered in the past are available for future offerings and a current schedule may be viewed on the website.
- WVWA and our Signatories embrace common DEBI terms and concepts to advance DEBI from an informed, culturally humble and cohesive place. The currently available “What is DEBI” and Allies & Accomplices: Tools for Equitizing Together trainings from Diamond Strategies are great jumping-off points to these common terms and concepts. Timeline: These courses are offered on an annual basis and may be translated into a self-paced format for Leadership access and use with existing employee groups and as part of new hire on-boarding. Slide sets developed in 2023 are now available, Train the Trainer (TTT) and Self-Paced videos goal by mid-2024.
- Train the Trainer (TTT) tools will be developed that allow leadership to participate in individual training experiences through courses offered by Diamond Strategies, and effectively pass them along at the institutional level, engaging employees across their organizations. Timeline: A full offering of these courses has been rolled out to Leadership as of December 2023. Plans to develop TTT and Self-Paced videos should commence in early 2024.

*A De-escalation Toolkit,  
Inclusive Hiring, Really  
Community Engagement and Outreach  
Using Tools and Developing DEBI Leadership Skills  
Unleashing the Power of JEDI: A Leadership Deep Dive*

- Through the re-designed [DEBI Website](#) (soft launched Spring of 2023), and ongoing updates and outreach via WVWA weekly Zoom meetings, newsletter communications, and the Annual Meeting, our DEBI journey has been made accessible to all customers, stakeholders, employees, and our extended community, so that they all may find ways to engage and become potential ambassadors/exemplars of this ongoing process. Industry education programs are equitable, relatable, culturally conscious, and accessible to all, encouraging participation regardless of geographic areas, identity groups, and needs. Timeline: Materials and information on Website is ever-evolving. Free Zoom-based training offerings for WVWA Members and their employees led by Diamond Strategies began in 2022, and these repeatable trainings will be offered annually, as well as developed into self-paced video trainings by Mid-2024.
- Provide outreach to WVWA members, employees and stakeholders regarding options for outsourcing services that aid Leadership in standardizing and formalizing best practices around HR-related topics that infuse more equitable, predictable, and organized approaches. One known source of such items is Hagan Hamilton Insurance Solutions, and their Mineral and HR Service Inc. compliance materials. Another resource is WISE training. Timeline: Ongoing, with goal to highlight new or existing resources in appropriate cadence (either monthly or quarterly) in DEBI Newsletter and Friday WVWA Zoom call venue.

*Examples of such topics are:*

*Successful on-boarding  
Employee Handbook requirements/best practices  
Benefits, Job Ladders, structured annual reviews  
In-service and training hours policies for employees  
succession planning and hiring practices.*

- Provide leadership-specific training that aids our management and ownership when grappling with issues of conflict resolution, the importance, and economic benefits of welcoming perspectives from a multitude of backgrounds and a variety of experiences when problem-solving, and promoting the use of non-violent communication skills and active listening. Timeline: Ongoing. Began in 2022, evolving to Self-paced and TTT in mid-2024.)

*Bystander Intervention Training  
Managing Your Triggers  
Abilities and Accessibility*

SECTION II EXECUTIVE SUMMARY

*The Art of De-Escalation & Interest-based Resolution*

- Provide message board on [DEBI website](#) and awareness during weekly outreach meetings of WVWA and DEBI Newsletter to encourage folks to support existing and perhaps create needed Affinity Groups (i.e. Women in Wine, Hispanic Winemakers, LGBTQIA+...)  
Timeline: Start investigating existing Affinity Groups to see if they want help, perhaps ask for spokespeople to appear on weekly WVWA meetings and/or work to assist them in publicizing, if they wish, their efforts and meetings.
- Phase 2: More exploration is needed to learn how best to create resources that will help the WVWA organization, its members, and our Signatories leverage procurement and supplier diversity.

SECTION III WVWA APPROACH

*This section identifies the comprehensive and collaborative approach models utilized for the development of this Strategic Plan in alignment with the unique needs, challenges, and opportunities faced by the WVWA organization, its Board, and its constituent community.*

METHODOLOGY

*The following overarching questions guided the effort:*

- *What are the perceived links between organizational DEBI, employee engagement, safety, innovation, efficiency, and excellence?*
- *What are the social/cultural demographics of WVWA leadership, staff, community, regional peers, stakeholders, and community?*
- *What are WVWA policies and practices that influence DEBI?*
- *What are staff perceptions of DEBI and of related perceptions, practices, and behaviors?*

*Per a 2019 DEBI Pulse survey of 850 executives around the world, Russell Reynolds Associates learned that organizational efforts related to DEBI work were categorized into one of three maturity categories:*

EARLY STAGE	INTERMEDIATE STAGE	ADVANCED STAGE
<i>DEBI is treated primarily as a compliance issue and DEBI strategies are largely reactive.</i>	<i>DEBI is treated as a talent issue and focuses on diverse employees.</i>	<i>DEBI is treated as a business and organizational issue and engages all employees.</i>

*Russell Reynolds Associates asserts “some companies invest in diversity and inclusion (D&I) but fail to gain traction with it. Others invest in D&I and make it an integral part of their culture. What makes the difference? To learn more, we recently explored what distinguishes organizations that have successfully capitalized on their D&I efforts from others. We found that organizations with advanced D&I strategies have more structure and accountability than those with less developed efforts. We also found that leaders at advanced organizations are nearly twice as likely to understand the crucial difference between simply hiring diverse talent and creating an inclusive environment to develop and retain that talent.” Moreover, they maintain, assessing the state of DEBI within organizations is crucial, because “executives at organizations with advanced D&I strategies are about 30 percent more likely than others to feel highly loyal, innovative and set up for top performance.”<sup>4</sup>*

### SECTION III WVWA APPROACH

Furthermore, their research demonstrates that “taking a reactive, check-the-box approach to D&I leads to worse outcomes than doing nothing at all.” “Elements from each stage—namely, a focus on compliance and talent—are essential to success,” they reveal, “yet the most advanced organizations manage to move beyond any single end goal and make diversity and inclusion an ongoing enterprise-wide mission. They tackle D&I from all angles, investing in inclusive leaders and cultures as well as diverse talent and equitable policies and practices.”

WVWA adopted an approach that models DEBI behaviors through values of respect, collaboration, and consensus building. As such, early work requires identifying and building relationships with key stakeholders and leveraging previous and current efforts as well as multiple perspectives. We trust that the answers for the organization lie within the organization. With appropriate knowledge, skills and effective facilitation, the organization has created and owns their Strategic Plan to ensure that it is sustainable.<sup>5</sup> Diamond Strategies and WVWA’s development and implementation of the Plan reflect Russell Reynold’s recommendations addressed above.

Steps to arrive at this point included:

1. Established an employee-comprised DEBI Taskforce (now Council) in 2019
2. Created a DEBI Tool-Kit in 2021
3. Implemented an organizational assessment (March of 2022) to identify opportunities for growth and change including:
  - a. Interviews with leadership and staff
  - b. Input from Council members
  - c. DEBI Survey
  - d. Review of website, communications, policies, practices, programs, and demographics
  - e. Feedback from external stakeholders (Former board members, tasting room visitors, and consumers)
4. Convened focus area workgroups to address assessment results and identify next steps.
  - a. Each of the four focus area workgroups met multiple times to identify needed outcomes and initial action steps to achieve them. Groups recognized that some initial action steps were exploratory in nature and would produce additional action steps. As has been stated, the Plan is an iterative process that will continue to evolve as the work is completed.

### SECTION III WVWA APPROACH

5. Using the Plan, work groups are reviewing actions that are within their responsibility area with the DEBI Council. They will:
  - a. Identify actions already in progress
  - b. Review priorities identifying ease or difficulty of implementation and impact of implementation based on:
    - Resources needed (time, staff, external assistance, costs, etc.)
    - Information/research needed
    - Any policy changes required (administrative procedures, standard operating procedures, labor contracts, etc.)
    - Culture shift – change management and training
  - c. Provide more specific next steps to achieve 2023-2027 goals
  - d. Secure needed resources, information, etc.
  - e. Affirm monitoring/tracking methodology to assess progress
    - Finalize metrics that will be used
    - Integrate into performance plans
    - Finalize reporting structure
6. Action steps and progress will be documented and presented for discussion at
  - a. Brief monthly updates to the WVWA DEBI Council, Executive Director, and Board
  - b. Quarterly updates to the WVWA community and WVWA Board
  - c. Dialogs with key stakeholders to ensure accountability; ensure feedback is reinserted into the improvement process including updates to performance measures, budget requirements, milestones, and resource needs.

For this approach to be meaningful, training in DEBI is viewed as developmental in nature. It is understood as a change process influencing self-awareness, beliefs, attitudes, and actions, in addition to intellectual/cognitive learning. Training curricula utilizes synergistic experiential participation to integrate and internalize concepts, moving from personal awareness to inter-group communication and understanding, and ultimately to recognizing the impact of systems on equity. In other words, our process meets everyone where they are, providing the appropriate scaffolding to help them advance individually and collectively. Upon completion of training, participants are asked to identify specific actions to apply the concepts in their work environments at each level as a demonstration of their personal commitment to ongoing learning, growth, and change.

## SECTION III WVWA APPROACH

### LEADING BY EXAMPLE

*It is important for leadership to provide personal examples and align their actions with their verbal commitments. As a Signatory, CEO, winemaker, or team leader, it should not be any different. WVWA promotes an open workplace, and open partnerships, within which all people can communicate, not just effectively, but exceptionally interpersonally and interculturally. People from all walks of life will have different perspectives on how things should operate within the WVWA network. Listening to each point-of-view and responding accordingly, is prioritized at WVWA, and this teaches others best practices.*

### DEBI COUNCIL

*The creation of WVWA's DEBI Taskforce in 2019, now referred to as the DEBI Council, was an integral step to intentionally and effectively tap into the proven strategic benefits derived when organizations foster an environment that encourages and values diverse viewpoints and nurtures individual inclusion to enhance employee satisfaction and performance to better serve the diverse needs of diverse customers.*

### ESSENTIAL FUNCTIONS OF THE DEBI COUNCIL

*The DEBI Council is responsible for providing leadership and guidance for WVWA's DEBI journey. This includes developing, leading, and implementing strategic goals and objectives to enable everyone associated with the WVWA to perform their best work in the most inclusive approach feasible. The work further includes building and scaling a diverse and inclusive culture in partnership with WVWA's Signatory management teams and all cross-functions association-wide.*

### STAKEHOLDERS AND DEBI COUNCIL ROLES

*Because DEBI is an association-wide business strategy to improve organizational culture, with the positive effects of DEBI touching nearly every aspect of WVWA Signatory operations and customer service, the DEBI Council interfaces and builds relationships with myriad stakeholder groups.*

*Each individual stakeholder group has an integral and unique role within the WVWA network's success. Accordingly, the general role of the DEBI Council is to actively seek to learn the interests and needs of each stakeholder and spearhead solutions in alignment with WVWA's strategic goals. In some cases, stakeholder groups may express interests in conflict with other stakeholders. In these cases, the role of the DEBI Council is to provide leadership and guidance*

## SECTION III WVWA APPROACH

*to determine how best to satisfy the most important interests/needs of all stakeholders. As a newly focused business strategy, the role of the DEBI Council includes diplomacy to build engagement and consensus with all stakeholder groups.*

*The closest working relationships of the DEBI Council, and the WVWA staff, include operating officers, human resources, employee resource groups (ERGs), unions, recruitment partners, etc. Many functions of these groups necessarily overlap as DEBI best practices are intrinsically interwoven into the aggregate employee lifecycle including, but not limited to, recruitment and selection processes, employee benefits offerings, training and development opportunities, employee wellness, employee recognition, and employee engagement and retention strategies. In this relationship, for example, the DEBI Council and WVWA staff in general, are to conduct research on DEBI best practices in areas that overlap with human resources and provide recommendations.*

*Another key stakeholder group includes partnering with DEBI colleagues within the wine industry. The support and resources from these partners are critical to the role of WVWA's DEBI Council, enabling the WVWA to gain access to current and evolving best practices for scalability and adaptation. A third stakeholder group is that of the current employee-comprised "site Committees," and journal/e-news committee. The DEBI Council's primary role in this context is to contribute to developing relationships of trust amongst the group members for maximum effectiveness in exchange of ideas, concern, and counsel.*

### SUMMARY OF DEBI COUNCIL CHAIR ROLE

*The DEBI Council's Chair is essential to optimally achieving WVWA's DEBI mission. The Chair leads and guides stakeholders in laying a strong foundation to create a work environment where every employee feels safe to contribute freely and fully from their diverse background and where the launching of DEBI initiatives has its best chance of success. The DEBI Council Chair is also responsible to set the agenda based on input from group members and from apparent needs in alignment with the applicable goals. The Chair also leads these meetings to encourage inclusive participation and is responsible for timely implementation of group decisions and action outcomes.*

### ORGANIZATIONAL ACCOUNTABILITY AND THE NEED FOR MEASUREMENT

*Siri Chilazi and Iris Bohnet, in the Harvard Business Review, remind us that data is "useful to expose a problem and garner attention—after all, what does not get measured does not count. But sometimes the numbers alone don't garner the will to change DEI-relevant behaviors."<sup>6</sup>*

### SECTION III WVWA APPROACH

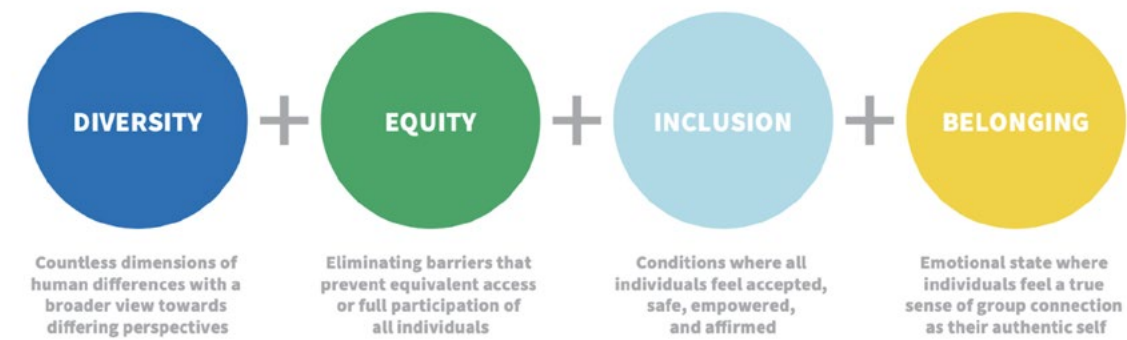
To make progress, it is imperative that WVWA decision-makers align staff performance expectations with DEBI goals, measure progress throughout each employee’s evaluation period, and identify accountability effects when not met. Supervisory coaching and collaboration are likely to be the number one effect when goals are not met, whether DEBI goals or otherwise. When goals are met, employee recognition and rewards are warranted and necessary to incentivize more of the targeted behaviors. Siri Chilazi and Iris Bohnet continue: “Goals are an even more potent mechanism to achieve behavior change. They serve to mobilize both the will (motivation) as well as the way (effort and strategies) of behavior change. Moreover, when goals are made public, they provide an accountability structure that research shows, makes us more likely to achieve our aims.”

### SECTION IV DEFINING AND CONTEXTUALIZING RELEVANT TERMINOLOGY

This section is intended to provide clarity on term definitions for application within this Strategic Plan. The WVWA’s initial focus remains on DEBI, however it is essential for readers to also understand the definitions of Equity and Belonging, and how they interface with DEBI.

#### WHAT DOES DEBI LOOK LIKE?

When launching a DEBI effort, it is important that WVWA first understands what DEBI is and what it looks like in action. DEBI is much more than just race, gender, and sexual orientation. Furthermore, it is important to emphasize the importance of DEBI initiatives. The WVWA leadership is aware that institutional clarity about DEBI will increase awareness, belonging, better practices and services, and inclusive, dynamic solutions within WVWA. Russell Reynolds Associates surveyed 2,167 executives around the world and it was clear that many struggled with understanding ‘inclusion’.<sup>7</sup>



#### DIVERSITY

“Diversity has traditionally been thought of in terms of the ‘visible’ differences between people, such as gender and race, with a focus on eliminating discrimination based on these differences. Diversity is about those differences, but this narrow definition ultimately short-changes what it really means. Diversity is about our backgrounds, personality, life experiences and beliefs. In fact, all the things that make us who we are. It is a combination of the visible and invisible differences that shape our view of the world, our perspective, and our approach.”



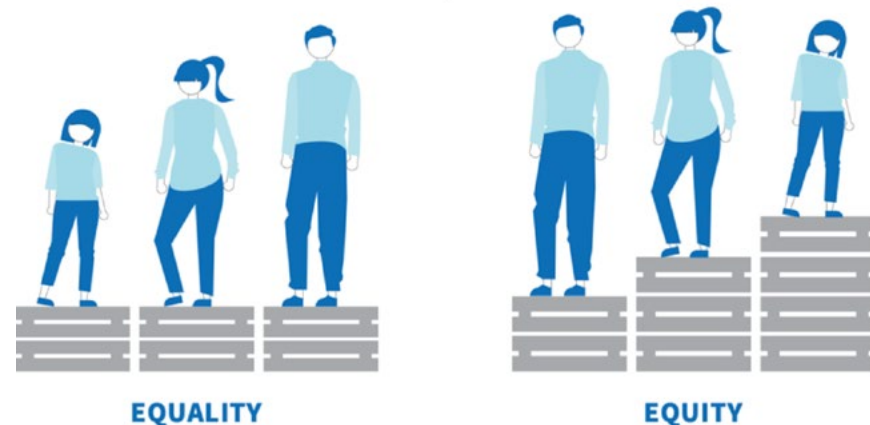
Deloitte, “Only Skin Deep: Re-examining the Business Case for Diversity,” (September 2011)

“A broader view of diversity is encapsulated by the idea that diversity is really about diversity of ‘thought’. So, what does this mean for the business case for diversity? A lot. It offers a more inclusive and engaging discussion than one focused on visible diversity, which is often binary and therefore divisive. And it creates a new line of inquiry, shifting the question from ‘How can increasing gender and racial diversity help us improve business outcomes?’ to ‘How rich is our knowledge bank?’, ‘Do we have a variety of perspectives necessary to deal with complex problems and create innovative solutions?’ and ‘Are we fully valuing and leveraging the potential of all our employees?’”<sup>8</sup>

While research on diversity and performance often focuses on visible diversity, the case connecting diversity of thought to engagement, innovation and risk prediction is growing and appears more solid than the causal link between gender and race and business success. So where does that leave demographic diversity? Demographics now become a ‘check in’ metric, a moment of truth. In essence, demographics act as a lead indicator as to whether organizations are drawing from the full knowledge bank and making merit-based, rational decisions.”<sup>8</sup> Diversity is defined as the countless dimensions of human differences. The WVWA recognizes that donning a diversity and inclusion lens will help the organization make more informed, innovative, culturally responsive, and sustainable decisions, and while racial and gender equity is a focus, the WVWA strongly proclaims their commitment of the identities and factors (and others) below, in their work.

**EQUITY**

“As a function of fairness, equity ensures that everyone has what they need to reach their full potential. Equitable treatment involves eliminating barriers that prevent this. As a function of inclusion, equity ensures that essential educational programs, services, activities, and technologies are accessible to all. Equity is not equality. It is the expression of fairness and the absence of discrimination.”<sup>9</sup> For example, equality is providing everyone with the same document with the same font size and language. Equity is giving individuals with the document tailored to their needs with perhaps a larger font size for those with visual impairments and/or in one’s primary language.



**BELONGING**

Belonging is the goal of efforts related to diversity, equity, and inclusion activities. Belonging is the emotional state where individuals feel a true sense of connection in the group for who they are and need not consciously or unconsciously guard any part of their identity in other social groups.

**INCLUSION**

“Encompassing all; taking every individual’s experience and identity into account and creating conditions where all feel accepted, safe, empowered, and supported. An inclusive organization expands its sense of community to include all, cultivating belonging and giving all an equal voice.”<sup>10</sup>

**DEBI LEADS TO BELONGING**

In action, these terms would be expressed as follows:

- Diversity I see that the WVWA organization includes people from many backgrounds
- Equity I feel like the WVWA and/or my employer gives me what I need to succeed
- Belonging I feel like I am an integral part of the WVWA family
- Inclusion I feel like my ideas are heard and valued

Excerpts from *The Value of Belonging at Work* (hbr.org) report: Social belonging is a fundamental human need, hardwired into our DNA. And yet, 40% of people say that they feel isolated at work, and the result has been lower organizational commitment and engagement. Humans are so fundamentally social that we can even bond with strangers over the very experience of not having anyone with whom to bond. Consider this recent story in *The Guardian*, which prompted people to share their own experiences of feeling left out at work. More than 800 wrote in. One anonymous worker in the United Kingdom lamented, “I get paid well to do something I enjoy, and...[I’m] surrounded by clever, funny, like-minded people. And for 45 or 50 hours every week, I feel isolated.” If workers feel like they belong, companies reap substantial bottom-line benefits. High belonging was linked to a whopping 56% increase in job performance, a 50% drop in turnover risk, and a 75% reduction in sick days. Employees with higher workplace belonging also showed a 167% increase in their employer promoter score (their willingness to recommend their company to others).



SECTION V DATA AND ANALYSIS

“One of the biggest surprises in this research was learning that fitting in and belonging are not the same thing. In fact, fitting in is one of the greatest barriers to belonging. Fitting in is about assessing a situation and becoming who you need to be to be accepted. Belonging, on the other hand, doesn’t require us to change who we are; it requires us to be who we are.”

– Brené Brown, Ph.D., Research Professor, Lecturer, Author, and Podcast Host

This section conveys some of the raw data that informed the Strategic Plan development and provides analysis, revealing opportunities for improvement. Information for this section was sourced from the WVWA website: [willamettewines.com](http://willamettewines.com), relevant human resources information and statistics, individual meetings with employees, and employee exit interviews.

PROCUREMENT/SUPPLIER DIVERSITY DATA

A basic review from the WVWA procurement function identified that there has been little systemic focus, tracking, or marketing of diverse suppliers. This finding presents a great opportunity to discover what the WVWA can do to outreach to underrepresented suppliers for goods and professional services, anticipating cost savings from the increased competition. Some of the certified small businesses to include in outreach efforts are:

- Disabled Veterans Business Enterprise (DVBE)
- HUBZone Business Enterprises (HUB)
- Small Disadvantaged Businesses (SDB)
- Disadvantaged Business Enterprises (DBE)
- LGBTQ-Owned Business Enterprises
- Minority Business Enterprises (MBE)
- Veteran-Owned Businesses (VOB)
- Women-Business Enterprises (WBE).

As a starting point, observations, and recommendations from a comprehensive purchasing program review will provide insight into areas that may need initial attention before developing or implementing an effective Supplier Diversity Program.

SECTION V DATA AND ANALYSIS

DEMOGRAPHIC CHARACTERISTICS FROM SURVEY AND U.S. CENSUS DATA <sup>11</sup>

2022	Total	Oregon	United States
Women	65%	50%	51%
White	91%	83%	59%
BIPOC	9%	25%	41%
Neurologically Diverse (20 of 201 responses)	11%	36%	35% - 40%
Hearing (7), Visually (6), Mobility Impaired (1)	7%	4%, 3%, and .5%	6%, 5%, and 14%
Veterans	3%	11%	7%
Sexual Orientation (Heterosexual)	81%	97%	87%
Sexual Orientation (LGBTQIA+)	20%	6%	13%
Gender Identity (Female)	64%	51%	51%
Gender Identity (Other)	3%	3%	3%
Age (30—49)	65%	14%	43%
Faith (Atheist or Agnostic)	34%	13%	5%

There were 201 responses out of an estimated 1250 potential respondents. 160 responses were required to produce a statistically viable report, Diego Garcia, “How many survey responses do I need to be statistically valid? Find your sample size,” Survey Monkey, 2022; United States Census; National Library of Medicine; CNN; Pew Research Center, “In U.S., Decline of Christianity Continues at Rapid Pace—An update on America’s changing Religious Landscape,” October 17, 2019; Pew Research Center, “About Three-in-Ten U.S. Adults Are Now Religiously Unaffiliated,” December 14, 2021. It is worth noting the It is worth noting that Americans 25 to 29. Source: WVWA’s June 2022, DEBI Survey, was conducted in English and Spanish.

are 50% of the population.

Self-identified Christians make up 63% of U.S. population in 2021, down from 75% a decade ago.

COMPARATIVE DEMOGRAPHICS

- WVWA’s Board of Directors is 89% White and 35% male
- WVWA’s Board of Directors is 11% Black, Indigenous and People of Color (BIPOC). 1 is Bi-racial/Multiracial and 1 is LatinX. Whereas the latest Census Bureau estimates are that the U.S. population was 59.3 percent White; 18.5 percent LatinX (Non-White Hispanic); 12.5 percent Black; 5.8 percent Asian; 2.2 percent two or more races; and .9 percent Indigenous.

INTERVIEW AND DATA THEMES

The following information and themes are derived from one-on-one interviews, DEBI Council interviews, and other discussions with employees and staff. In many cases, the individuals’ exact words are provided herein.

## SECTION V DATA AND ANALYSIS

### GENERALLY

1. *Employee understanding of DEBI is broad and varied. Significant training is necessary to educate and align staff and signatories with what DEBI is and is not.*
2. *The WVWA is generally a very innovative, hardworking, and caring place. People are generally thoughtful problem solvers. Employees are generally “open to” or “strongly in favor” of institutionalizing DEBI.*
3. *There is eagerness to move “more quickly” and “dig deeper” in your efforts regarding major DEBI commitments among a significant number of owners (42), and sales and operators (104), a combined 73% of respondents.*
4. *Still, 2% of respondents “strongly disagree” with the WVWA’s stated DEBI goal.*
5. *“Leaders are ready to ‘listen and discuss,’” but as one employee said to Diamond Strategies in confidence, “I worry about how resilient and supportive they will be when opposition arises. Most owners are not interested in or serious about institutional change.”*
6. *“There are relatively large pockets of opposition,” one interviewee said, “and I worry about them undermining our DEBI efforts, because they believe the WVWA, Oregon, and America, needs no improvement in these areas.”*
7. *The WVWA appears to be relatively “cliquish” and at the top another employee noted.*
8. *“BIPOC members who express frustration with our homogeneity are often viewed as ‘hostile’ and they are rarely, if ever, a part of the ‘cool kids club.’”*
9. *The WVWA is “patient,” and “safety” and “results oriented.” A major concern is getting the job done and well. People are very assiduous and “passionate about winemaking.”*
10. *The WVWA is not viewed as an overly controlled and structured place. Formal procedures are not handed down as C-suite mandates, and this is relished by the employees who reached out to Diamond Strategies. However, BIPOC employees generally feel that this lack of executive action and structure, curtails DEBI movement, and therefore creates a less than optimal, if not largely “racially homogenous” and “culturally lethargic” workplace, marked by “passive aggressive,” “heteronormative,” and “anti-Black” behavior.*
11. *“Leadership,” another employee remarked, “has sought input from employees and worked to be more collaborative, and this has made me feel more included in important decisions.”*
12. *“I would like to participate more in our DEBI activities,” a respondent told us, “but there isn’t enough time during the day.”*
13. *“Inclusion is very important, but it’s highly politicized,” another employee shared. “I’m worried about saying the wrong thing, so I say very little, if anything.”*
14. *DEBI is a unique and politicized movement that has brought uncertainty and trepidation.*

## SECTION V DATA AND ANALYSIS

### ORGANIZATIONAL LEADERSHIP

1. *The WVWA leadership is knowledgeable, passionate, and interested in developing the requisite level of “cultural humility” to advance a DEBI culture. Such humility will be required to properly recruit, retain, mentor, and nurture talent inclusively and equitably.*
2. *Some of the WVWA’s most powerful signatories are generally considered to be transactional in their leadership, generally lacking in cultural humility, and generally unsupportive of DEBI, which makes culture shifts difficult, but not impossible. The association’s leadership is generally viewed as being far more informed and responsive to the WVWA’s DEBI needs.*
3. *There is broad belief that the WVWA Board is largely transactional too—to the point of “missing the forest for the trees” with DEBI. As one employee put it, “the Board understands that it must do something around DEBI, but I’m not sure that all of them understand why. I think some of them feel pressured to act, but I don’t believe that they are true believers, which means that they’re not truly committed.”*
4. *The WVWA Board Chair and Executive Director exemplify empathy and a results-oriented focus, that doesn’t treat the two as being mutually exclusive.*
5. *The WVWA current leadership is generally considered to be efficient.*
6. *If the WVWA leadership “becomes as creative in their DEBI work as they are in winemaking,” an employee shared, “the association will transform the industry.”*

### MANAGEMENT OF EMPLOYEES

1. *Management styles in the WVWA are generally characterized by reasonable demands and achievement, but employees across the board believe that there being “not enough time in a day” is a critical issue.*
2. *Management styles in the WVWA have been historically characterized by security of employment, except for BIPOC persons, who have been, as one person stated, “hired or engaged for their diversity and retained for their conformity.”*
3. *There seems to be implicit bias against, and unspoken but behavioral resistance to, persons who are outspoken on DEI matters.*
4. *“I really like the WVWA,” an employee told us. “There are some great people here, but it’s difficult to feel that I belong in an organization that I don’t see myself in.”*

## ORGANIZATIONAL GLUE

*The glue that holds the WVWA together is tethered to focus on task completion and loyalty.*

1. *The glue that holds the WVWA together is tethered to a focus on compassion, empathy, safety, task completion, and a love of nature and winemaking.*
2. *Commitment to the WVWA is a strength because autonomy, “love of the work,” and efficiency.*
3. *The glue that holds the WVWA together also includes commitment to quality, creativity, safety, and an emphasis on achievement and goal accomplishment.*
4. *The WVWA is united by mission and values, not rules and policies. This strength is also a weakness when it comes to systematizing DEBI with ownership and accountability.*
5. *The solvent that threatens to dissolve the DEBI glue, is an influential, silent, or “Machiavellian” spring of discontent, that has flowed from a belief that underrepresented employees, stakeholders, and clients must “whitewash” themselves ideologically and in disposition and suppress feelings of cultural isolation and trauma stemming from micro-aggressions, to exist in the WVWA. Employees often navigate this issue, with anxiety, in silence, for fear of being labeled “whiners” and “radical troublemakers.”*

## CRITERIA OF SUCCESS

1. *The WVWA appears to define success based on timely, efficient deliverables. What deliverables will be established for DEBI?*
2. *The WVWA defines success based on empathetic excellence—creating joy by “promoting, preserving and advancing the prestige of Oregon’s Willamette Valley AVA and its wines through the support of our members, community and environment.”*
3. *Two thirds of the people of the world are BIPOC. More than half of the world’s population are women, and while the survey results suggest that women are represented at every level, and outnumber men among the WVWA’s rank and file, opportunities for improvement remain. the WVWA’s current purpose and vision are not aligned with global demographic realities, demographics in most American urban centers, and the region’s demographic developments. Even if the goal was to service predominantly White, upwardly mobile clients, such clients are wanting more culturally informed winemaking, selling, and drinking experiences. Failing to address this will eventually be viewed as desired and intentional, instead of a byproduct of location and client resources.*
4. *The WVWA defines success as efficiency, excellence, and dependability.*
5. *More focus has been placed on the development of human resources, teamwork, employee commitment, and concern for all people.*

6. *The WVWA’s “space” is viewed as silo-enhancing, as employees, signatories, and stakeholders are dispersed in-person and virtually, and across many miles. Employees generally want to implement programming, and perhaps protocols and practices, to promote better interpersonal and intercultural communication and team cohesion.*
7. *The WVWA is viewed as a sufficiently paying organization, but respondents indicated that pay equity, particularly along race lines, is an area of needed growth.*
8. *Some organizations are reluctant to “Lead with Race,” “center anti-Blackness,” and provide specific outreach to immigrants and the LGBTQ+ community in their DEBI efforts. This may mitigate pushback from those who approach DEBI from a place of discomfort, ego, power, privilege, lack of experience, implicit bias, and outright bigotry, but it also places the organization behind the curve within the DEBI movement, which is public, and permanent.*

*It is worth noting, according to Bethan Grylls and Mecca (‘Mex’) Ibrahim of New Food Magazine, that “if the wine sector wants to survive, it must have a drastic rethink about the way in which it represents and relates to the world today. The wine sector has been called out for its lack of diversity,” and this lack of diversity “is both maddening as well as foolish for an industry that needs to grow its consumer base. The fact remains that the wine industry needs more women, more people of color in wine media, wine journalism, winemaking, and more support for the people in our industry who are not recognized. Generally, we can see encouraging progress being made but it’s evident that more still needs to be done to make the wine sector more inclusive.”*

*“If we are to face the challenges of the future,” not just environmental, “we’ll need to collaborate” and plan strategically to “ensure we as an industry are giving them a voice, for example at events or in podcasts. By putting a spotlight on the voices already in the sector, we can encourage the talent out there in the world that a career in wine is a possibility. Because why shouldn’t it be?” There is a clear moral and business case for being mindful of this reality and acting in ways that disrupt this trend of homogeneity. Diversifying and equitizing, however, requires organizations to recognize and take on the burdens of the underrepresented. Institutions cannot diversify and equitize and remain aloof and disinterested in the socio-economic struggles that underrepresented peoples face.*

## SECTION V DATA AND ANALYSIS

### WHY DOES SEXUAL ORIENTATION MATTER? WHY BE 'OUT' AT WORK?

*Survey Results data revealed the WVWA is approximately 19% LGBTQIA+. General feedback is that being “out” at work makes one’s life easier. It enables non-heterosexual employees to also bring their whole self to the workplace without expending energy to hide parts of their identity and personal life. Being “out” at work provides role models for newer employees. Being “out” mitigates the risk of being invisible which hinders teamwork; invisibility breeds ignorance which leads to fear and fear is an obstacle to trust and belonging.*

### CONSULTANT RECOMMENDED STRATEGIC DIRECTIONS

- 1. We advise the WVWA to continue to cultivate it’s DEBI garden by fertilizing it with consistent, historicized, DEBI specific C-suite and general employee training.*
- 2. There are significant, lingering trust issues within your ranks, especially among your BIPOC and immigrant employees. While others compete for the “Gold Medal in the Oppression Olympics.” This dynamic can lead to exhaustion, burnout, animosity, and attrition among your most unrepresented and vulnerable employees, which will cost the WVWA money, consistency, and reputational damage. The WVWA, therefore, needs to continue its commitment to acquiring new knowledge and resources, and to creating new, uncomfortable challenges, and prospecting for new opportunities.*
- 3. The WVWA needs to be more consistent and committed to growth, including hitting stretch targets, being sage, and serving your clients consistently, all through a DEBI lens, which is inextricably linked to well-being, safety, and success.*
- 4. The WVWA should continue to emphasize and support stability and growth, while recognizing the need to adapt and be responsive to the needs of all employees, and their communities.*
- 5. The WVWA should commit more energy to profiling and recognizing individual employees and their contributions to the organization.*
- 6. The WVWA should continue to emphasize and support stability and growth, while recognizing the need to adapt and be responsive to the needs of all employees, and their communities.*

## SECTION V DATA AND ANALYSIS

### DEBI SURVEY QUESTIONS AND RESULTS: An Overview

#### DEVELOPMENT

*The WVWA, in collaboration with Diamond Strategies, designed this survey to assess employee thoughts, feelings, experiences and knowledge related to DEBI.*

#### ADMINISTRATION

- The Survey was given via Survey Monkey to ensure anonymity and convenience.*
- All employees were invited to respond between July 21 and August 30, 2022.*
- Participation was voluntary and participants could opt out of answering any questions they preferred not to answer.*
- 201 people completed the survey for a 16% response rate, which, according to Survey Monkey, is a representative sample of the WVWA industry.*
- Despite some concerns about the length of the survey, each respondent spent an average of 11 minutes and 3 seconds completing the survey.*

#### STRUCTURE

*The Survey consisted of 87 total questions.*

*Q1-Q67 were multiple-choice (using a five-point Likert-type scale) about employee feelings, thoughts, knowledge, attitudes, and experiences related to DEBI at the WVWA.*

*Q68-Q87 were multiple-choice designed to determine the demographics of the WVWA’s employee population. The items asked participants to indicate information related to job category, supervisory status, tenure with their organization, military status (past or present), age, race, LatinX origin, gender, disability status, neurodiversity, sexual orientation, religion, marital status, and multilingual ability. Employees could opt not to answer any or all the questions and results were anonymous.*

SECTION V DATA AND ANALYSIS

SUMMARY THOUGHTS ON THE SURVEY

The fact that the survey questions emerged from the employee-comprised DEBI Council is important. It provided direction to explore areas they believe needed to be addressed based on the WVWA DEBI experience. The fact that the Board and Executive Director supported it cannot be overstated. It takes courage to ask questions about one’s organizational culture and performance and evidence of a required commitment to change. Once information is seen, it cannot be unseen. The results of the survey provide both promise and possibility: Promise in that there was a strong response from the organization to answer a voluntary survey and that respondents expressed their interest and commitment to the work; and possibility in that respondents shared their thoughts, feelings and experiences allowing change to happen.

JUNE 2022 DEBI SURVEY RESULTS FOR KEY QUESTIONS

Question	Description	% Agree
3	Diversity, equity, and inclusion (DEBI) are important to WVWA	90%
6	I would participate in voluntarily DEBI training	79%
7	I would participate voluntarily on a committee to improve DEBI	64%
15	I can voice a contrary opinion without negative consequences	56%
18	I prefer to interact with people at work who are like me	11%
21	Supervisors solicit diverse perspectives	56%
23	Leadership shows DEBI is important through their actions	73%
25	I feel like I belong at WVWA	73%
32	I know where to report unfair treatment at work	86%
36	Leaders will act appropriately in response to discrimination	56%
37	WVWA works to build diverse teams	38%
38	All have equitable opportunity to succeed at WVWA	44%
39	Career development paths exist for all at WVWA	32%
40	There is open / honest communication at WVWA	43%
41	All voices are equally heard and valued at WVWA	42%
45	WVWA meets the needs of those with disabilities	41%

SECTION VI RACIAL AND GENDER EQUALITY

DIMENSIONS OF HUMAN DIVERSITY ARE ENDLESS

When people think about diversity, the first two that come to mind and are often the hardest to navigate: race and gender. This section focuses on these two elements, which are typically the most visible dimensions of human diversity. While the goal of the work of diversity and inclusion is about diversity of thought, measuring progress along visible dimensions are often considered leading indicators of change. This is particularly relevant to the WVWA based on the current employee race and gender demographics wherein the organization is 91% White and primarily male at the owner, CEO, and wine maker levels. The intent of this section is to highlight how race and gender result in different experiences for employees and provide a recommended approach to address those differences in the industry.

As Adia Harvey Wingfield demonstrates, “race and gender continue to create divergent and uneven outcomes for women of all races and for men of color. This is particularly evident in the underrepresentation and experiences of women employed in professional occupations [especially in STEM related fields].” STEM is an acronym for science, technology, engineering, and math. “The most common race among winemakers is White,” argues Zippia, “which makes up 69% of all winemakers. Comparatively, there are 15.7% of the Latino population and 8.5% of the African American population.” Women of color, therefore, are the most underrepresented in terms of race and gender in the wine industry.

GENDER

This is especially of concern in the wine industry. “Though women make up 46.8% of employees across all professions in the United States, they account for less than 17.8% of winemakers. A report released in 2018 by The Red Cabinet, an organization of 100 female wine executives in California, found that women CEOs ran 13% of the state’s wineries with an annual production of more than 10,000 cases. Interestingly, there were no female CEOs at wineries producing between 100,000 and 500,000 cases annually. But at wineries producing 500,000 to 1 million cases per year, 25 percent of CEOs were women. In other areas of executive management, the report found that women were significantly overrepresented in human resources and marketing and underrepresented in operations, sales, viticulture, IT, and winemaking.”<sup>13</sup>

Furthermore, writes Karen MacNeil, even though “for the past 15 years, women have on average made up 42 percent of graduates from the prestigious Viticulture and Enology program at the University of California, Davis. Women, in fact, have earned more college degrees in general than men for the past three decades [primarily in the humanities], and while the popular assumption is that more education equates to more money, that’s not the case here: For the past

20 years, women have made about 80 cents for every dollar men earn for the same work. Last year, that figure rose marginally to 82 cents according to the U.S. Bureau of Labor Statistics. As management level increases, however, the gender pay gap widens. Female chief financial officers, for example, experience the highest pay gap, earning just 77 percent of what their male counterparts do, according to a 2017 report by the College and University Professional Association for Human Resources (CUPA-HR).<sup>14</sup> Research also indicates that in predominantly male fields, women face significant exclusionary, isolating, and harassing behavior because they may be seen as interlopers who “do not belong.” Pay in these areas allow women more equitable pay than traditional “women’s work”. Therefore, they often endure the harassment as speaking up results in inaction (at best), retaliation or further harassment. These behaviors are seen in the military, construction industries, manufacturing, field work, etc.<sup>15</sup>

## RACE

The issue of gender is further complicated by race. As noted, WVWA is 91% White whereas the population of Oregon is 83% White. Portland’s BIPOC population, however, is 27%.<sup>16</sup>

## INTERSECTIONS OF GENDER AND RACE

While we can look at gender and race separately, it is important to note that race and gender are not additive in the lives of Black, Indigenous, and People of Color (BIPOC). They are always inextricably linked. Women of color are often viewed by White counterparts through a racial lens first and foremost, even though they are female. They are impacted more significantly by race and gender as a result. Black women are paid just 63 cents for every dollar paid to White, non-Hispanic men; Indigenous women earn 60 cents; for Latinas it is 55 cents; and Asian American and Pacific Islander Women a dismal 52 cents. As it was in the early 20th century, women of color continue to experience occupational and economic disadvantages that reflect the ways both race and gender affect their work experiences.”<sup>17</sup>

How do racism and sexism impact women of color in professional settings? Research reveals that both factors adversely affect women through stifled leadership opportunities, the ongoing persistence of specific forms of sexual harassment, and subtle but pervasive doubts about competence, intelligence, and skill that are unrelated to actual performance. For instance, in today’s professional occupations, networks, mentors, and connections play important roles in advancement. As one attorney notes, executives who rarely, if ever, have Black people in their personal or professional circles may be uncertain or uncomfortable interacting with them as peers. Other times, this lack of mentoring is a consequence of intentional exclusion when leaders make it a point not to include Black women in teams, as mentees, or on important projects. But

either way, these patterns thwart Black women’s mobility in organizations and their ability to realize ambitions and secure leadership roles. And Black women are left to struggle harder to access and advance in these professions, with occupational underrepresentation and wage disparities to show for it.<sup>18</sup>

It is important to note that these issues are not limited to Black women. In a recent study, sociologist Margaret Chin finds that Asian American women experience racialized and gendered forms of sexual harassment that leads to isolation and results in exclusion from leadership opportunities. Latinas, too, find that coworkers may interact with them based on stereotypes that they are unintelligent or illegally in the country, depictions that then require extra work to disprove.<sup>19</sup>

Women of color are usually underrepresented in professional, high-status jobs in law, medicine, academia, and business. When they do make it to these rarified roles but are the only ones in an organizational setting, they are more likely to doubt the company’s commitment to inclusion and equity and thus are more likely to want to pursue opportunities elsewhere. Yet we know through multiple studies that when companies put measures into place that focus on achieving more gender diversity, women of color often lose out unless there is an explicit focus on race as well as gender. This is not to say that White women face an easy road, particularly in professions that are disproportionately dominated by men. But race and racism create specific, unique challenges for women of color that are too easily ignored with broad platitudes that seek to advance women’s representation without questioning which women are most likely to benefit.<sup>20</sup>

HOW DOES WVWA ACHIEVE EQUITY?  
“TARGETED UNIVERSALISM”

*The WVWA will need to be strategic and deliberate in providing equitable opportunities for women and Black, Indigenous, People of Color (BIPOC) in recruitment, retention, mentorship, professional development, and leadership. This Plan urges the WVWA to utilize a “Targeted Universalism” approach to its DEBI work. Targeted Universalism “means setting universal goals pursued by targeted processes to achieve those goals.” Within a Targeted Universalism framework, universal goals are established for all groups concerned. The strategies developed to achieve those goals are targeted, based upon how different groups—BIPOC persons and women—are situated within structures, culture, and across geographies to obtain the universal goal.<sup>21</sup> To better understand Targeted Universalism, refer to the following article and brief video: [Targeted Universalism - CPS Equity Toolkit](#) and [Targeted Universalism - YouTube](#).*

*Targeted Universalism “is goal oriented, and the processes are directed in service of the explicit, universal goal.” For this approach to be meaningful diversity, equity, and inclusion is viewed as developmental in nature. It is understood as a change process influencing self-awareness, beliefs, attitudes, and actions, in addition to intellectual/cognitive learning. Training curricula utilizes experiential and synergistic experiences to assist participants in integrating and internalizing concepts, moving from personal awareness to inter-group communication and understanding, and ultimately to recognizing the impact of systems on equity. In other words, this process is grounded in scaffolding — meeting everyone where they are and helping them advance individually and collectively. Participants are asked to identify specific actions to apply the concepts in their work environments at each level. Targeted Universalism rejects quotas in lieu of system equity.*

LOOKING FORWARD

*As noted, the recommendations for effective DEBI reflect sound organizational practices related to effective leadership, communication, policies, and processes. DEBI work, then, is not a stand-alone effort, but an integral part of organizational excellence. The areas of focus and long-term outcomes provide the targets for actions.*

*Those areas of focus are Leadership, Employee Lifecycle, Communication and Education & Outreach. As an iterative process, it is expected that timelines and actions will continue to evolve as the work unfolds. The WVWA leaders have experience creating and monitoring strategic plans. These same strategies will be used to monitor the progress and changes needed for this Plan. These will include annual review of Plan status, outcome data through pulse*

*surveys (intended to gain and measure employee input and insights on a specific topic with five or fewer questions to assess progress in between major surveys), other metrics identified, and re-implementing the full DEBI Survey at regular intervals. Action items will be updated, clarified, and monitored to facilitate annual review of the Plan status.*

*Change is often fear and anxiety inducing. However, one-on-one conversations suggest that even some skeptics within the WVWA organization and industry have approached this journey with an open mind. Best practices underscore the need for leadership to make DEBI an explicit institutional priority (with workload support), offer frequent and sustainable DEBI professional development opportunities for themselves and their direct reports, and craft policies and practices that support inward-facing and outward facing DEBI at every level. To realize the WVWA’s goals, the organization is primed and ready to establish itself as an exemplar of DEBI not simply because it is necessary to remain creative, efficient, psychologically safe, and industrious, but because it is the right thing to do.*

*Ongoing WVWA employee support at every level for DEBI work, and for the implementation of this Strategic Plan, is essential, but it cannot be overstated. Specifically, all leaders in the organization and industry-wide are encouraged to continually seek to achieve our Leadership goals and all are encouraged to actively participate in the achievement of Employee Lifecycles, Communication, and Education and Outreach goals. Specific owners/drivers for each of these focus areas have been designated for the remaining two Strategic Plan focus areas and for specific areas in the other three focus areas.*

*Finally, next steps during the initial Plan implementation period include using this document as a people investment guidebook to make meaningful recommendations and progress—while measuring outcomes against the stated metrics—making needed adjustments, and relentlessly continuing this process. The WVWA work environment must be such that every employee has what they need to succeed. This is how to best serve ourselves, our partners, and our customers.*

*“Companies need to be transparent and make a genuine investment in DEI. Those that do will have a better understanding of the socio-cultural dynamics, nuances, and sensitivities of key markets, thus giving them a competitive edge to best engage their target audiences and communities at large. This, in turn, results in companies that advance their corporate citizenship while becoming more profitable in the long run. But most importantly, developing equitable workplaces has a far-reaching ripple effect that benefits company stakeholders and their communities, allowing them to leave behind a powerful and positive legacy. When it comes to DEI, which path will your company choose?”*

*- Gina Ricard, Consultant with Ichor Strategies*

## FY23-FY27 DEBI STRATEGIC PLAN CITATIONS

1. *Diamond Strategies, LLC., "Diversity, Equity, Belonging, and Inclusion Assessment, Consulting Project #1419, (Mesa, AZ: @Diamond Strategies, LLC. All Rights Reserved).*
2. *This section is influenced by, and reflective of, the assessment and planning report by the Grand Canyon Trust, "Justice, Equity, Diversity, and Inclusion Plan," 2020-2021.*
3. *Grand Canyon Trust, "Justice, Equity, Diversity and Inclusion Plan."*
4. *Russell Reynolds Associates, "Diversity and Inclusion: What Separates the Best from the Rest" October 22, 2019.*
5. *"The best practices and frameworks that inform our methodology promote DEBI advancement through values of respect, collaboration, consensus building, thematic programming, and DEBI structure building. Specifically, WVWA embraced "Programming" and "Global Strategic" approaches to diversity, equity, and inclusion." Also see "[Diversity and Inclusion: What Separates the Best from the Rest](#)"; and "[Programming](#)" and "[Integrated Global Strategic](#)" approaches.*
6. *Siri Chilazi and Iris Bohnet, "How to Best Use Data to Meet Your DE&I Goals," Harvard Business Review, December 3, 2020; Alexis Bateman, Ashley Barrington, and Katie Date, "Why You Need a Supplier-Diversity Program," Harvard Business Review, August 17, 2020.*
7. *Deloitte, "Only Skin Deep: Re-examining the Business Case for Diversity," (September 2011).*
8. *Ibid.*
9. *Ibid.*
10. *Harvard West-Lake, "DEI-Terms," the National Association of Independent Schools; The Kirwan Institute for the Study of Race and Ethnicity at The Ohio State University, Lakeside School, and Dr. Beverly Daniel Tatum's Why Are All the Black Kids Sitting Together in the Cafeteria.*
11. *Karen MacNeil, "Being A Woman in the Time of Reckoning: The 2nd Annual Report of the Status of Women in the Wine Industry," Winespeed, March 8, 2023.*
12. *Please see the "Appendix A" at the end of this Assessment for detailed statistical outlays of WVWA's survey data.*
13. *MacNeil, "Being A Woman in the Time of Reckoning."*
14. *Imrana Jalal, "Women, Water, and Leadership," Asian Development Bank Briefs, No. 24, December 2014., P. 13.*
15. *New America, "Breaking Into the Blue-Collar Boys' Club: Male-Dominated, Low-and-Middle-Wage Sectors," October. 10, 2018.*
16. *Ibid.*
17. *National Partnership for Women and Families, "Quantifying America's Gender Wage Gap by Race/Ethnicity," March 2021.*

18. *Adia Harvey Wingfield, "Women Are Advancing in the Workplace, but Women of Color Still Lag Behind," The Brookings Center," October 2020.*
19. *McKinsey, "Women in the Workplace 2020," September 20, 2020.*
20. *Ibid.*
21. *Ibid.*
22. *Othering and Belonging Institute, "Targeted Universalism: Policy & Practice—A Primer," University of California, Berkeley, May 8, 2019.*