Our Way Forward Together with Clarity and Purpose

2022–2027 DEI Strategic Plan At-A-Glance

Message from Our President and Chief Executive Officer

The events of the past few years have reinforced our need to address inequity in all facets of our lives. Mathematica's vision for our future is centered on conducting work that promotes equity in a way that is informed and influenced by evidence. Through our work, we seek to help our clients identify the policies, programs, and processes that promote greater equity in access to opportunities, assistance, and advancement. At the same time, we want to bring the same focus on equity to our Mathematica community. We want to make sure we promote access to mission-oriented opportunities for all Mathematica staff, regardless of race, ethnicity, life experiences, and other factors that have too often constrained opportunities for individuals in our nation due to bias, conscious or unconscious. I look forward to working with all of you to execute the plan and make Mathematica an even stronger community in the future.

Paul Decker

Message from Our Chief Equity and Inclusion Officer

Taking the next step

Our diversity, equity, and inclusion (DEI) journey at Mathematica has been varied, illuminating, and complex. As an organization, we remain committed to continuous learning, improvement, and growth. We continue to advance DEI with humility, knowing that we don't always get it right or always have all the answers, but remain steadfast in our pursuit of equity and justice to advance our mission and move toward our vision. We are truly a work in progress together. The 2022–2027 DEI Strategic Action Plan represents a significant milestone in our DEI journey, further clarifying the path ahead and providing us with a more systematic approach to propel us forward. It reflects greater intentionality around holding ourselves accountable for the organizational change and actions needed to drive the transformation and impact we seek in our business practices, employee, client, and partner experiences, as well as in the diverse communities and sectors served by our work. Our four DEI strategic pillars, Workforce, Workplace, Our Work, and Marketplace, frame the work we do, how and with whom we do our work, and undergird our why—our unwavering dedication to working from the inside out. The DEI pillars are rooted in the belief that as we evolve as individuals and collectively as an organization, so will our work and its impact.

Dawnavan Davis, PhD, MS

Strategic Plan Summary

The challenge
Gaps exist between our current and desired future state related to DEI.

The opportunity
Implement the five-year Strategic Action Plan to make progress toward our future state.

The call to action
Colleagues at all levels are encouraged to actively support and engage in the plan, contributing their knowledge and passion to our internal and external work.

In 2021, Mathematica embarked on an eight-month strategic planning process in support of our forward-looking vision to shape an "equitable and just world where evidence drives decisions for global impact." We applied a four-phase approach to our strategic planning, with subsequent phases building on earlier ones. The resultant five-year Strategic Action Plan is the culmination of work completed in Phases 1 and 2.

Developing the Strategic Plan. Phases 1 and 2 were informed by input from staff at all levels; EDI Global staff; Mathematica's Board of Directors; and clients, partners, and suppliers, relying on evidence and best practices from the field. This input enabled us to define the current state of DEI at Mathematica, the future desired state, the gaps that exist between the two, and the specific actions to fill the gaps.
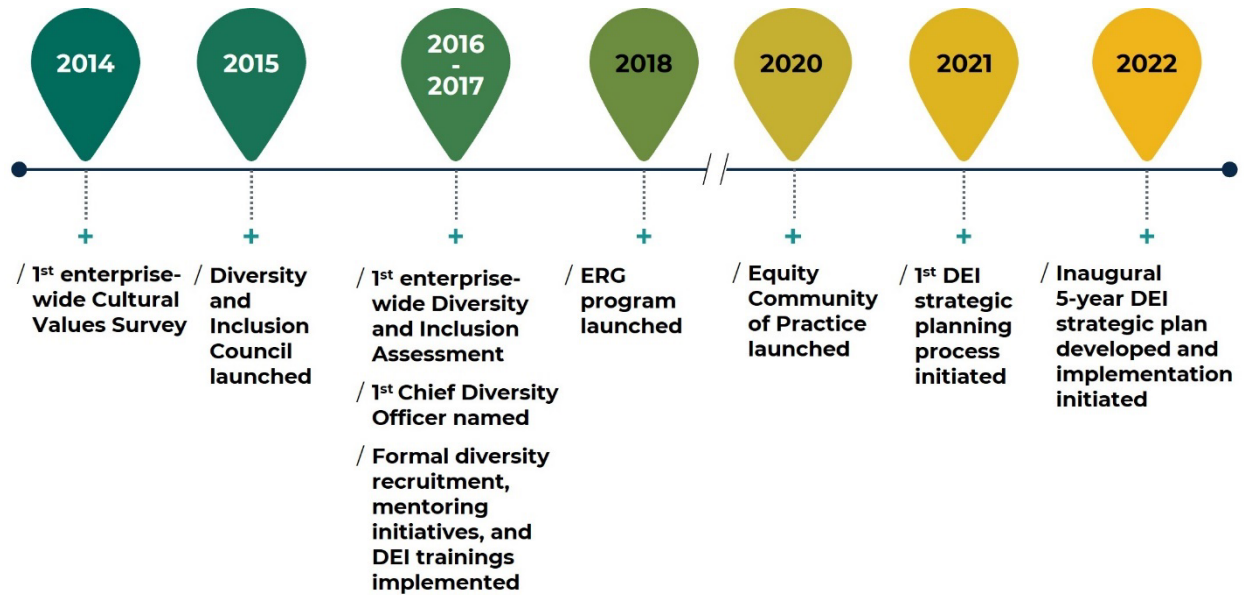
Figure 1. The four phases of strategic planning
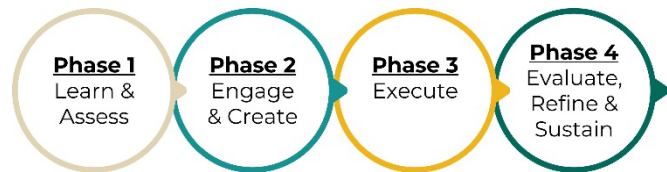
Our early DEI efforts

Mathematica takes pride in its commitment to advance DEI. Over the last several years, we have embarked on a journey to embed DEI into our daily practice as we move toward our 2035 vision (see Figure 2). To be a leader in our field and have the greatest impact on public well-being, we recognize that DEI must be a cornerstone of our work inside and outside our company.

Figure 2. DEI milestones

2014	2015	2016 - 2017	2018	2020	2021	2022
/ 1st enterprise-wide Cultural Values Survey	/ Diversity and Inclusion Council launched	/ 1st enterprise-wide Diversity and Inclusion Assessment / 1st Chief Diversity Officer named / Formal diversity recruitment, mentoring initiatives, and DEI trainings implemented	/ ERG program launched	/ Equity Community of Practice launched	/ 1st DEI strategic planning process initiated	/ Inaugural 5-year DEI strategic plan developed and implementation initiated

Note: This figure is described in detail on page 9.

Mathematica's DEI Impact Model

DEI advancement and multilevel impact are predicated on (1) DEI alignment to organizational mission and business priorities; (2) organizational commitment and formal investment; 3) system, process, and practice integration and shared accountability; (4) change readiness and agility, and (5) ongoing strategic planning and engagement. With these elements in place, our DEI impact model posits that transformational change and impact (Mathematica's "North Star") flows from organizational mission, vision, values, and data-informed actions across our four DEI strategic pillars (see Figure 3).

Figure 3. DEI impact model
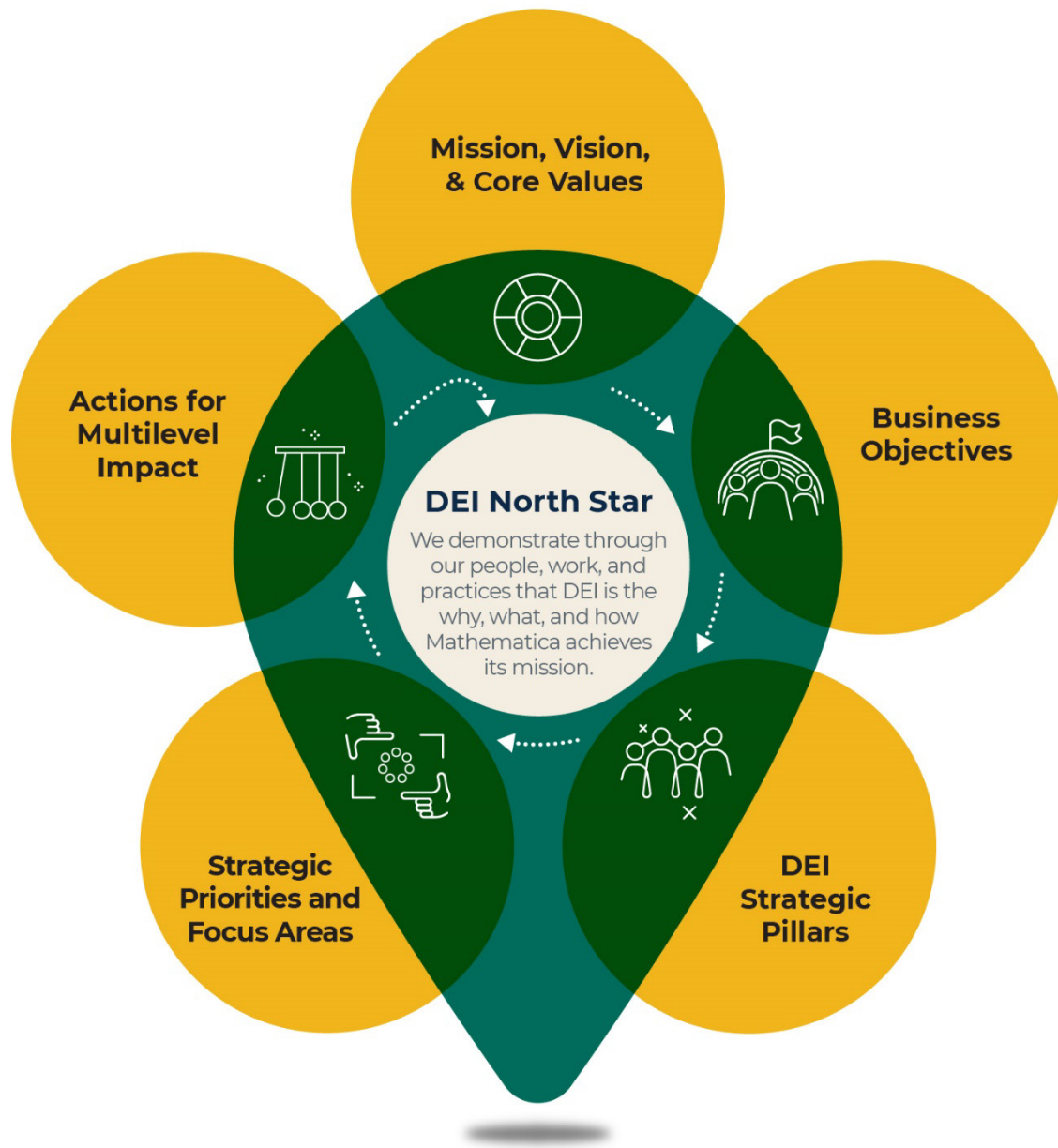
Note: This figure is described in detail on .

Guiding principles for DEI

Achieving DEI progress is a complex, layered, and rarely linear process; therefore, it is important to have foundational principles that frame and ground our DEI efforts. These principles are complementary to our core values and cultural fundamentals and guide the way we think about and engage in our work to advance DEI. We believe these principles are central to

transformational change and will help realize the impact we seek across our four DEI strategic pillars: Workforce, Workplace, Our Work, and Marketplace.

1. **Evidence and best practice inform our efforts.** We use internal and external evidence and insights to inform strategy, planning, and decision making.

2. **Our approach is disciplined and systematic.** We approach our work in an organized, measured, and methodical manner.

3. **We share accountability.** We create accountability across the organization for advancing DEI goals.

4. **Courageous innovation and transformation are encouraged.** We lead boldly, take chances, and are nimble. We challenge the typical ways of thinking and doing. We are willing to support new concepts and practices.

5. **All staff are engaged and demonstrate a collaborative spirit.** Colleagues across the company demonstrate a participatory and partnering orientation to the work. We have a collectivistic mindset and break down siloed practices.

6. **Our work results in demonstrated, sustained, and measurable impact.** We develop data-informed and iterative processes to show the effectiveness of our actions.

The Strategic Plan's pillars, priorities, and focus areas

The Strategic Plan is organized around four interrelated strategic pillars and each pillar's strategic priorities and focus areas (Figures 4 and 5, respectively).

Figure 4. DEI Strategic Plan pillars

- **Workforce:** Our people, with a focus on talent acquisition, onboarding, retention, employee growth and development, and diverse representation at all levels
- **Workplace:** The physical and virtual places in which we work, our organizational culture and climate, DEI governance and structures in place, and the integration of DEI into business processes and operations
- **Our Work:** Our research and advisory services portfolio of work; how we engage with our colleagues, clients, partners, and the groups of people who are the focus of the work; how we design and execute the work; and how we build, grow, and sustain relationships with our partners
- **Marketplace:** Our engagement externally with the global ecosystem and the impact of our work on the field of policy research, communities, and society

Figure 5. Overview of Strategic Plan priorities and focus areas by pillar

DEI strategic pillar	Strategic priorities and aims	Focus areas
Workforce	**1.** Candidate and employee experience	• Talent representation (acquisition, onboarding, and retention) • Talent growth and development • Performance, promotion, and recognition
Workplace	**2.** Organizational culture and climate **3.** DEI business structural and operational integration	• Inclusivity and belonging • Benefits, accessibility, and accommodations • DEI structural and operational integration
Our Work	**4.** DEI business development and service delivery integration **5.** Staff DEI capability and capacity expansion **6.** Equitable opportunities and experiences among staff and partners	• Equity research and service portfolio and practice expansion • DEI capacity building and capability expansion within research and advisory services • Project and proposal opportunities (staffing) and staff experience • Partnership framework and partner experience
Marketplace	**7.** External presence, influence, and impact	• External engagement • Work awareness, visibility, and recognition • Supplier and vendor diversification and investment • Corporate social responsibility

Implementation infrastructure

Moving from our current state to our desired state requires shared accountability and dedicated implementation support from Mathematica's employee owners, as well as strong stewardship from the plan's executive sponsors, our chief executive officer and chief equity and inclusion officer, and Mathematica's DEI team. Formal accountability for plan success is rooted in an implementation structure that involves executive leadership and cross-functional staff working in concert with the DEI team to accelerate plan priorities and specific actions.

Successful plan implementation is grounded in several core assumptions: ongoing organizational commitment and prioritization of DEI, adequate resource allocation, organizational barrier identification and minimization, shared accountability, and data and information accessibility.

DEI Pillar implementation teams

We organize pillar implementation teams around the four DEI strategic pillars. Each pillar consists of workstreams connected to the pillars' areas of focus. Each workstream works in partnership with business owners and relevant business staff to design, develop, and support implementation and evaluation. Workstream members are cross-functional staff from the DEI team, the Employee Experience Council, the DEI Work Group, and relevant functional leaders across the organization.

To ensure organizational accountability at all levels, each pillar team consists of executive sponsors to support plan progress.

Timing and sequencing of implementation

The Strategic Plan takes a phased approach to accelerating existing and implementing new actions associated with each focus area over the next five years. Phase 1 (2022-2023); Phase 2 (2024-2025); and Phase 3 (2026-2027).

Evaluating progress on expected outcomes

The final stage of the strategic planning process focuses on evaluation and refinement. Business owners, DEI pillar implementation workstream teams, and the DEI team will use data to assess progress toward expected outcomes.

Conclusion

Mathematica is proud of our ongoing efforts to advance DEI. As our organization continues to grow and evolve, we recognize there is more progress for us to make in our journey to achieve truly equitable outcomes for our employee owners and the communities we serve. We reaffirm that commitment to foster transformational change and have established a clear vision and direction for Mathematica's continued success through the DEI Strategic Plan.

Acknowledgements

Mathematica's DEI Strategic Action Plan would not have been possible without the contributions of many individuals. We want to express sincere appreciation for staff, the Board of Directors, EDI Global staff, and clients, partners, and suppliers for taking the time to provide the insights and feedback critical to developing our five-year plan. A special thanks to our DEI groups—the DEI Steering Group, DEI Work Group, Employee Experience Council, and employee resource groups— for your leadership and partnership in the strategic planning process. Finally, we would like to acknowledge staff from our DEI, Communications, and Change Management teams for their collaboration and tireless efforts in support of DEI and the completion of the strategic plan.

Mathematica's DEI Groups

DEI Work Group: A working group of senior leaders across Mathematica serving to drive DEI enterprise-wide strategy, integrate DEI into functional area processes and practices, and develop solutions to ensure DEI impact.

Employee Experience Council: A group of employees who represent diverse roles, levels, tenures, and locations across the organization serving to support the improvement of the employee experience, in alignment with DEI priorities and goals, by bringing a DEI lens to Mathematica's internal procedures, our public face, and our daily interactions.

Employee Resource Groups: Employee groups who share a common aspect of identity and want to associate with others like themselves and their allies. This may include, but is not limited to, the following aspects of identity: race or ethnicity, gender, age, sexual orientation, parental status, disability status, veteran status, and so on. These groups come together to support and learn from one another while actively supporting Mathematica's mission. While the groups are organized around various aspects of individual identity, all groups are open to all employees and allies are encouraged to join. Currently, Mathematica has eight ERGs (Asian Pacific Islander ERG, Black ERG, Employees with Disabilities ERG, Latinx/Hispanic ERG, Military Veterans and Community ERG, Parents and Other Caregivers ERG, Pride ERG, and the Work from Home ERG).

Glossary of Terms

Belonging: The subjective feeling of deep connection with social groups, physical places, and individual and collective experiences. Belonging is a fundamental human need that predicts numerous mental, physical, social, and behavioral outcomes.[1]

Diversity: The variety of similarities and differences among individuals, often referred to as diversity dimensions, including, but not limited to gender, sex, gender identity and expression, ethnicity, race, native or indigenous origin, age, generation, disability, sexual orientation, culture, religion, belief system, marital status, parental status, pregnancy, socioeconomic status or caste, appearance, language and accent, mental health, education, geography, nationality, work style, work experience, job role and function, thinking style, and personality type.[2]

Equity: Equity is about fairness and justice. It is about taking deliberate actions to remove systemic, group, and individual barriers that hinder opportunities and disrupt well-being. Equity is achieved through the identification and elimination of policies, practices, attitudes, and cultural messages that create and reinforce unfair outcomes.[2]

Inclusion: The dynamic state of feeling, belonging, and operating in which diversity is used and valued to create a fair, healthy, and high-performing organization or community. An inclusive culture and environment ensures equitable access to resources and opportunities for all. It also enables individuals and groups to feel safe, respected, heard, engaged, motivated, and valued for who they are.[2]

Underrepresented group (URG): A group that is less represented in the organization than in the general population. This can refer to gender, race, ethnicity, disability status, LGBTQ identity, or veteran status.

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[1] Allen, Kelly-Ann, Margaret L. Kern, Christopher S. Rozek, D. McInereney, and George M. Slavich. "Belonging: A Review of Conceptual Issues, An Integrative Framework, and Directions for Future Research." *Australian Journal of Psychology*, no. 73, vol. 1, 87–102, DOI: 10.1080/00049530.2021.1883409.
[2] Molefl, Nene, Julie O'Mara, and Alan Richter. "Global Diversity, Equity & Inclusion Benchmarks: Standards for Organizations Around the World." North Las Vegas, NV: The Centre for Global Inclusion, 2021.

Alternative Text for Figures

Figure 2 DEI milestones

This figure summarizes data collection and key milestones in Mathematica's DEI efforts.

2014: Cultural Values Survey was conducted.

2015: The Diversity and Inclusion Council, now the DEI Employee Experience Council, was launched.

2016 through 2017: The first Diversity and Inclusion Assessment was conducted. Mathematica named its first chief diversity officer. Mathematica launched formal diversity recruiting and mentoring initiatives and DEI trainings were implemented.

2018: The Employee Resource Group (ERG) program was launched.

2020: The Equity Community of Practice launched.

2021: The DEI strategic planning process began.

2022: The DEI Strategic Action Plan was developed and implementation was initiated.

Figure 3. DEI impact model

This image depicts the link between Mathematica's (1) mission, vision, and core values, (2) business objectives, (3) DEI strategic pillars, (4) the DEI strategic plan's priorities and focus areas, (5) actions for multilevel impact, and (6) the DEI North Star.