

INTERPRETING AND OPERATIONALIZING DEI: U.S. VS. OTHER GLOBAL CONTEXTS

How We Got Here: Our Working Notes

Overview

Most of the organizations that make up the InterAction coalition are U.S.-based, international non-governmental organizations (INGOs), with staff and programs operating in a hugely diverse set of contexts around the world. Historically, the U.S.-located headquarters of an INGO has often been the office that sets organizational policies and manages outside contracts and funds, which affords it tremendous power and influence. To balance this within the context of diversity, equity, and inclusion (DEI)-focused initiatives, specific measures must be taken to avoid charges of backdoor neo-colonialism and the imposition of American-defined DEI frameworks onto local communities—both of which are in direct conflict with the international development sector’s localization agenda and the core principles of DEI.

Organizations must ensure that the perspectives, constraints, and contexts of their overseas staff and operations are actively taken into account for DEI efforts. Otherwise, actions may not be relevant or appropriate and will be less likely to work at each level or location across an organization. One way organizations can include overseas staff in these conversations is by taking stock of the language they currently use to define diversity, equity, and inclusion—and any other relevant terms for this work—and broadening it to be universally applicable to any country or cultural context for global organizations. This task is not impossible. Discrimination, inequity, and exclusion exist in most societies, even if the identity markers that differentiate people vary across those same societies. Once these concepts or principles are broadly understood, then they can be applied to examples from the local context.

Although the words ‘diversity, equity, and inclusion’ have definitions that can be applied universally, the broader “DEI agenda” is one that has been driven largely by historical factors and contemporary developments in the United States. While we must take advantage of U.S. organizations’ push for DEI and appreciate that the Black Lives Matter movement resonated with many societies around the world, international NGOs work in many different places with their own unique histories, systems, and patterns woven into the fabric of their societies. Organizations working overseas should strive to foster dialogue and the co-creation of DEI-focused trainings that take local contexts into consideration instead of merely exporting existing trainings made specifically for American audiences. By doing so, organizations can frame engagement between headquarters and overseas staff more productively and also support locally-led or locally-driven conversations about what DEI means.

In conjunction with the above, organizations must also work to break down the hierarchies that have persisted in the NGO sector for decades. The language currently used to describe staff working overseas (i.e., “expatriate” versus “local staff”) reinforces a caste system and clear divide between employees who were recruited in their home countries and those who were hired in the U.S. to be “expatriates” or headquarters-based. Using this language reflects and supports inequitable arrangements and power dynamics in which staff members receive unequal treatment—whether in terms of language, responsibilities, salary, or benefits—depending on where they were hired. To break down existing hierarchies, organizational DEI committees or councils need to explicitly include proportional

representation from staff abroad and actively consider their perspectives in developing DEI-focused policies and initiatives. Different time zones and working hours can make this a challenge, but adopting best practices such as recording meetings, taking detailed minutes, and rotating routine meeting times (to avoid asking those teams working overseas to take a disproportionate number of meetings outside of their normal working hours) can play a role in helping staff abroad feel more included in the work of any DEI committee or council.

It is worth noting that cultural relativism can also have its limits and pitfalls where local law or cultural constraints may directly challenge organizational values or established human rights principles. Therefore, understanding the appropriate boundaries for organizational DEI efforts, even within internal operations, is critical.

Impact

Good management of these challenging dynamics between U.S. and non-U.S. based operations can translate into and be measured by progress in the key areas listed below. Organizations should consider their current practices and how much they prioritize:

1. **Localization:** The localization agenda involves delegating more control and decision-making power to local groups, not only regarding policies and programs, but also procurement processes. Localization will result from greater knowledge sharing and a push from the development industry, including from donors reviewing their policies and requirements to be more open to potential grantees at the local level.
2. **Inclusive participation:** It is important that all team members, both U.S. and non-U.S. based, feel included, that their opinions are valued and taken into account, and that they have the opportunity to influence organizational developments. For example, having one organizational compensation philosophy that only applies to U.S.-based staff and a different one for those abroad is not likely to engender feelings of inclusion. Allowing staff to provide their input on a single organizational philosophy would be a more equitable and inclusive approach.
3. **Employee sentiments:** Organizational climate surveys are critical to assessing employee sentiments, especially when using the same questions regularly, because they allow for measurement against a baseline. The data should be collected anonymously and voluntarily but must also be disaggregated to identify certain areas, patterns, or trends of progress and concern.
4. **Successful tailoring:** Tailoring DEI methodologies to local contexts can help ensure greater resonance and impact. Such tailoring can only be accomplished through sustained dialogue and the collection of inputs from colleagues working in those locations. Balancing equitable treatment of staff across the organization while also considering the distinctive needs and constraints in which the organization operates can be quite a challenging tightrope to walk. However, doing so utilizing many of the recommendations articulated in these working notes can contribute to greater trust, cohesiveness, and a sense of inclusion among staff.
5. **Pushing the DEI envelope:** Although respect towards local contexts is paramount, we must understand the limits of cultural relativism and promote change in a respectful and viable manner. As INGOs, we must push for DEI, but also understand the path to it will need to be built from the vision of many and not only our own.
6. **Minimum organizational standards:** To ensure staff feels they are being treated as equitably as possible, organizations may wish to consider a minimum standard or floor for employee benefits

regardless of where in the world employees work. Such a standard may include minimum levels of paid vacation, parental leave, medical insurance, and retirement benefits. These will most likely need to be adapted to local contexts (e.g., many countries have excellent public healthcare systems) and local laws, but a minimum standard can contribute to feelings of fairness. The next step beyond a benefits floor might be indexing any employee-borne cost of those benefits (e.g., private medical insurance premiums) to their salary, so that staff are contributing a fixed percentage.

Recommendations

1. **Consider using broadly applicable language related to discrimination, inequity, and exclusion:** The language used to define DEI and any other relevant terms for this work must be almost universally applicable to any country or cultural context for global organizations. Once these concepts or principles are broadly understood, they can, and should, be applied to examples from the local context.
2. **Foster dialogue and co-creation instead of simply exporting training:** Frame engagement between headquarters and overseas offices productively. Instead of exporting DEI-focused “training” to staff working overseas, take a more mutual approach rooted in dialogue and co-creation to support locally-led or locally-driven conversations about what DEI means and how it applies in their specific context.
3. **Break down hierarchies:** Overhaul the language we use to describe operations abroad that reinforces or bolsters an inequitable arrangement in which staff is treated differently depending on where they are physically located. Organizations should recognize and address the power dynamics present in the relationships between senior and junior employees and those between local staff and staff that is “expatriate” or U.S.-hired or headquarters-based.