**Diversity, Equity & Inclusion Part 2: Start-up Checklist**

**Getting Started**

As mentioned repeatedly in Part 1 of this series, the Diversity, Equity & Inclusion (DE & I) platform requires a change in organizational culture to be successful.  In Part I, we detailed how to get your DE & I efforts off the ground. In Part 2, will we discuss how to improve the odds for sustainable cultural change by weaving DE & I into the fabric of the employee lifecycle. By including DE & I in all these processes, you send a clear message to the workforce that this is an important aspect of the organization.

*“Start where you are, use what you have, and do what you can.” -- Arthur Ashe*

1. **Core Values:**Your core values help to establish guidelines on the types of behaviors that are important and valued by the organization. Companies, large and small, use core values as guiding principles for employees to embrace and live. Some organizations have adopted a core value that calls for “respect for others”. While this is a good start, it likely does not go far enough. Ideally, a core value that says “We value diversity of people, perspectives and ideas” goes further in addressing the DE & I principles.

Incorporating DE & I into your organization’s core values is an important step. There is no template or framed policy that can be used here. Instead, the vision of the DE & I program should be developed among leaders, employees and HR professionals in the organization.  It needs to be a true reflection of what you want to accomplish.

Just putting a sentence into the values statement or on your website is not what we are looking for here. Instead, focus on a meaningful statement that will depict the organization’s commitment to diversity, equity and inclusion and what you will do to be an advocate for your employees and the community.

While incorporating diversity into your values, you will open the door to have some tough conversations, and that is fine.  It is okay to be uncomfortable in your conversations with employees; that will be what drives change and helps leaders to understand how impactful a DE & I program can be to the organization.

Once you form a commitment to DE & I and develop a vision for incorporating it into your company goals, it will be time to develop those specific goals for the company and continue to reflect the DE & I language in your values, policies, company websites, social media platforms and anywhere else that can drive awareness and change.  As with any value, the leadership must take ownership of it and “walk the talk”.

1. **Attraction & Recruitment:***This topic will be covered in Part 3 of this series*.
2. **Selection:***This topic will be covered in Part 3 of this series*.
3. **Onboarding:**
	* Use an onboarding checklist to ensure consistent execution
	* Review how to properly onboard a new hire
	* Consider training onboarding ‘buddies’ that can explain overall corporate values and specifically speak to how the organization values diversity.
	* Encourage managers to plan activities to reinforce connections between new members and the rest of the staff, instead of allowing employees to drift to people who are “like” them.
4. **Development**:
	* Participation in focus groups.
	* Participation in a diversity taskforce.
	* Create Individual Development Plans for all of your employees.  Encourage managers to get out of their standard thinking about the corporate ladder.  Educate your Human Resources Team, Leaders and Executive Team on how traditional performance management can disadvantage certain groups.
5. **Mentoring:**  An effective mentoring program can play a significant role in furthering your DE & I efforts. It can be especially effective when you pair a diverse leader with a diverse up-and-comer. Here are some key steps to implementing a mentoring program:
	* Develop program goals
	* Identify the selection criteria for mentors and mentees
	* Define the elements of the program (i.e. job shadowing and 1:1 meetings)
	* Recruit and interview potential candidates
	* Match mentors with mentees
	* Measure results of the program and adjust as needed
	* Utilize a mentor checklist to ensure a good match and add structure to the process
6. **Promotion:**Your efforts to improve promotion rates for diversity employees begin by examining your current baseline. You need to take the baseline and set a goal to increase the rates of promotion by X% (X is specific to your organization). Setting a goal is only one-half of the equation. The other part involves the use of Individual Development Programs to build skill and readiness. Failing to invest in development prior to promotion is simply wrong and unfair. Is short, you would not be setting the stage for success.  Your goal is not to have quotas, but to change your processes to encourage diversity.  Talent which exists in your organization may be overlooked otherwise.  While overall, the courts seem to agree that remedying past discrimination and encouraging diversity is reasonable; an individual “non-minority” who accuses the company of discrimination based on losing an opportunity to a less-qualified minority candidate is possible.  Your goal should be to set standards that make sense.  Often management mindsets about “the best type of person”, excessive educational requirements and outdated job descriptions duties such as a rare/unnecessary lifting requirements in a Warehouse Manager job description need to be eliminated.
7. **Performance management and Compensation:**One way to make certain that diversity stays top of mind for managers is to build in a performance measure called “Building Diverse Talent”, which involves some combination of diverse hiring, training, retention and promotion. Remember the adage, ‘what gets measured, gets done’.  You also need to examine internal pay equity to determine if there are issues. If you have concerns about how to diagnose and remedy these issues, contact Catapult for assistance. Lastly, companies that are great at DE & I are known to establish bonus metrics to their diversity goal attainment.
8. **Leadership Development:**Here again you should use a data-driven approach to ensure you have strong diversity representation in your pool of next generation leaders. You may find that it is advantageous to provide each of your diversity leaders with a strong mentor. That incremental step may expedite the development process. In addition, diversity leadership training should be mandatory for all leaders.  This may include a book club where a new article, book or video is discussed weekly to help leaders understand the implicit bias against various groups.
9. **Succession planning:**A thorough analysis of your succession plans should help identify where your diversity gaps are at each level of leadership. Remember, you may need to bolster the effort by bringing in external diversity leaders. Your mindset should be to follow parallel paths: Grow internal diversity talent -and- supplement with external hires.

**Creating a Productive Task Force**

The purpose of a DE & I task force is to solicit ideas and solutions from a diverse group (age, race, gender, tenure etc.) of employees. Idea generation must be followed by the creation of action plans and measurable results. Keep in mind that the task force is not simply a start-up group (although it would eventually be phased out and give rise to an advocacy group).  Therole of both groups is to create DE & I sustainability within your culture.

1. Group size may vary, but 7-10 people seems to be a good number. Allow individuals to self-nominate (however, they must be performing well in their job)
2. Select employees that will have an opinion to offer, are passionate about the success of DE & I and have a track record as ‘go-getters’. They must be engaged employees because participation in the group requires discretionary effort above and beyond their everyday jobs.
3. Assign a senior leader champion to help provide guidance and support
4. Establish a project mentality (with a project charter to limit scope creep)
5. Utilize an accountability form or checklist to keep the focus on results. Failing to do so will likely result in great dialog, but no tangible action or outcomes.
6. Cycle employees in and out (designate duration of participation) to bring in new perspectives and add vibrancy.
7. Have a team spokesperson partner with the senior leader ‘champion’ to provide regular updates to the workforce.

**Engaging your Employees in the Process**

In addition to a task force, it is suggested that you survey employee sentiment about where the organization currently stands, what changes should be considered, and how to improve the DE & I culture.

1. You may find that the focus groups are an effective way to identify prospective members for the task force. Look for individuals who are unafraid to share their thoughts, have good ideas and bring a passion for constructive change.
2. Surveying employees about their perceptions is an important piece of the process. Their sentiment should help to inform your actions. In addition, they will feel like the process has been inclusive, which is exactly what you need.
3. One caution, as with all such surveys, you will need to clearly communicate to survey participants that this process is intended to gather ideas. Further state that leadership and the task force will evaluate each suggestion to determine its merit and/or feasibility. Finally, explain that not all comments and/or suggestions will be acted upon.
4. It is best practice to engage a third party to administer the survey, analyze the results, report findings to the leadership, and facilitate the discussion with the broader workforce. Catapult can assist you with such a project.
5. Anything you can do to establish some immediate, short-term ‘wins’ goes a long way towards developing momentum.
6. In addition, consider utilizing some sort of virtual suggestion box to allow employees to make suggestions as the need arises.
7. Ask the task force to come up with creative events that will keep the DE & I progress fresh in the minds of employees.
8. Include progress reports as a regular segment in “all-hands” meetings. Specifically, talk about current results vs. stated goals. If you are falling short, be able to articulate your plan of action to close the gap.

**What about the Ongoing use of Advocacy Groups?**

1. Many organizations have committees and groups that meet and discuss so many organizational and operational ideas, i.e. safety committees; therefore, why not have a DE & I advocacy group that assists in driving many of your initiatives
2. This group should include people from all different groups – race, sexual orientation, national origin and gender for example. This group can help promote cultural awareness, provide insight to recruiting and retention practices, add value in the marketing and branding of your organization, and assist with difficult conversations that may arise in the workplace.
3. Successful advocacy groups may be instrumental in driving change and helping leaders navigate the many challenges that an organization may face.
4. HR leaders must show support for these groups and ensure they have the structure and resources to have an impact on the organization’s culture.

**What are some tips to improve engagement?**

1. The phrase “low-hanging fruit” is a good place to start.  Perhaps DE & I has been thrust upon you out of the current chain of events and you are not ready to devote a lot of resources.  It is still important to show that you are starting the process.
2. Perhaps the first place to start is to re-evaluate your diversity recruiting efforts and to train your recruiters on the need to improve both the diversity talent pool (both internal and external candidates) and diversity hiring rates.
3. Include training on active listening. Listening must precede all else. Develop leaders that listen to learn, rather than listening to respond.
4. Talk to the workforce about the concept of cognitive empathy. That means that although I might not agree with you, at least I understand what you think.
5. Publicly recognize employees and leaders who are helping DE & I initiatives to be successful. That can be via a newsletter, roundtable, staff meetings or ‘all hands’ meetings.