**Diversity Resources and Education**

**Part 1: Start-up Checklist**

Getting Started This toolkit and associated materials are designed to assist business leaders and HR professionals to better understand how a diverse workforce and inclusive culture can help them achieve improved business results. It is aimed at those who have a vested interest in attracting, recruiting and retaining a diverse workforce within their organization. Anyone interested in improving the organization’s culture and elevating employee engagement will find the toolkit helpful. Let’s start by taking a high-level look of some key elements of a successful diversity, equity and inclusion framework:

**Getting Started:**

 **☐ 1. Informed & committed leaders:**

Organizations and leaders that are new to Diversity, Equity and Inclusion (DE & I) should use this toolkit (and the resources located within) to educate themselves on the topic. Like other business challenges, effective action must be grounded in a thorough understanding of the current situation. That means leaders must grasp the fundamental principles of DE & I and assess where they currently stand (i.e. baseline). It also requires that leaders understand how to convert insight into constructive action.

**☐ 2. Designed and sustained with input from the workforce:**

Your strategy should not be solely developed by the leadership team in a vacuum. Instead, utilize the workforce as a resource to inform and guide your efforts. To gather feedback, leverage focus groups (a.k.a. advocacy groups), and employee surveys. Don’t forget to solicit direct feedback from employees during everyday discussions with team members.

**☐ 3. Senior leaders as champions:**

It is not enough for senior leaders simply to give their “buy-in”. Top-level leaders need to lead from the front. That means standing in front of groups of employees via town-hall meetings (virtually if necessary). It also means specifically acknowledging organizational deficiencies and spelling out the specifics of your game plan to close the gaps. Finally, it means leading by example in terms of hiring, developing and promoting diverse candidates.

**☐ 4. Diversity is not an initiative:**

Understand that the work of diversity, equity and inclusion is not a short-term fix. It requires a long-term commitment to organizational culture change. The DE & I efforts of an organization should be built upon a solid foundation of change management principles. Each staff member is at a different point in their journey, and change management principles will provide a formal roadmap, communication and training plan and will increase the odds of short-term success and long-term sustainability.

**☐ 5. Transparency:**

Pull back the curtain to share DE & I successes and calls to action. Employees will trust that the organization is ‘walking the talk’ only if they have visibility to tangible progress and results. Results can be shared via a website portal, roundtables, newsletters, and town hall meetings.

**☐ 6. Embedded in the Core Values, Culture & Corporate Social Responsibility:**

Too often, employers view diversity solely through a “compliance” lens. In such cases, the efforts can take on a “check-the-box” feel. In addition, a singular focus on compliance fails to fully address organizational cultural shortcomings.

**☐ 7. Requires some sort of investment:**

Failing to provide an investment in both time and money will greatly diminish the likelihood of success. Build the DE & I platform into the budget, as both a standalone item, and a segment of the overall training budget.

 **☐ 8. Acknowledgement that there is no “one size fits all” approach:**

Your company’s approach to DE & I should be unique to your set of circumstances. For example, your starting point (baseline), your unique culture, your core values, your experiences (both successes and failures) with DE & I should all factor into your going forward approach.

**What exactly are we talking about?**

**Clarifying Diversity Equity & Inclusion:**

When you hear the word diversity, we typically think of a person’s skin color, but DE & I encompasses many other areas. Yes, we are talking about skin color, but we are also speaking about (among other things) a person’s socioeconomic background, sexual identity, and culture.

**Diversity:**

It is imperative for an organization to have diversity in all departments and at all levels, to include the Executive Team, Board of Directors and other leadership positions. This is accomplished through both your talent acquisition model and internal promotional opportunities. The traditional path of promotion or hiring needs to be re-evaluated to open up opportunities for people from backgrounds and cultures that are not the current company “norm”.

**Equity:**

Equity is the process through which we ensure everyone has a voice and can bring their own unique individual experiences in the workplace. Historically, organizations have focused on Diversity and Inclusion programs. More recently, companies have added Equity into the equation because without all employees feeling they have equal opportunities to share their voice and make an impact on the business, diversity and inclusion efforts will not be effective.

**Inclusion:**

Inclusion is the process of ensuring everyone feels included and welcome at the table. Leaders need to make sure their employees know they are welcome to meetings and discussions (when possible) and include them in those critical decisions. This may require managers to be more flexible and open to different ideas and work patterns.

Inclusion goes beyond diversity, by putting the concept and practice of diversity into action. It helps to create workplace environments characterized by engagement, respect, and a sense of connection. Inclusion promotes a richness of ideas, backgrounds, and perspectives that come together to create better opportunities for all employees.

**Why is it important to your business?**

Most organizations explore ideas that will give them a competitive advantage in their industry; therefore, a well thought out DE & I plan should be no exception. Considering the known inequities in the business world as well as the known benefits of diversity, a forward-thinking organization needs to elevate the importance of DE & I. Let’s examine a few key benefits that should assist you with stating your business case:

1. Improves teamwork & problem-solving: Diverse groups are demonstrably better at solving problems than homogeneous groups.

2. Meets the needs of diverse clients: Diverse employees help to value and attract a diverse mix of customers and clients.

3. Improves morale and employee engagement: Inclusion helps to ensure that employee voices are heard, and their needs are better understood. Employees who feel valued are more likely to be vested in their work. A biproduct of increased engagement is improved employee retention.

4. Fosters creativity and innovation: Employees that come from different backgrounds, cultures and experiences are more likely to generate new and creative ideas.

5. Strengthens your employment brand: Organizations that have a thriving DE & I platform will be viewed as being progressive and employee friendly. As a result, they will be more attractive to prospective candidates.

6. Supports Corporate Social Responsibility: Organizations that are committed to being good corporate citizens will find DE & I to be a great opportunity to demonstrate CSR with their internal customers (your employees).

**Where do we start?**

☐ 1. **Establish your baseline:** Before attempting to make a business case or sell senior leaders on a DE & I approach, it is advisable to assess your organization’s current situation. Start by asking questions such as:

* Do senior leaders publicly support diversity, equity and inclusion initiatives?
* Does your organization support community events where a diverse mix of attendees are present?
* Does your organization participate in related Corporate Social Responsibility partnerships?
* Does your organizational have any formal DE & I programs in place? - If so, how robust is the training and what are the measurable results?
* Is there a policy or statement that indicates the organization’s commitment to diversity? - If so, could internal and external candidates easily find it?
* Does the workforce seem to mix well, or are there cliques of “like people” that break off to socialize independently?
* Are your management and leadership teams appropriately diverse?

 The identification of a baseline starting point will help you to **frame your discussion with leaders** when you state your case. Later, after gaining leadership support, the baseline will inform your goal setting process and corresponding action plans.

Baseline metrics could include measures such as:

* Number and percentage of diversity new hires last year & this year
* Number and percentage of diversity employees at each level of management
* Number and percentage of diversity employee promotions and promotable employees in your succession plans
* Intra-departmental diversity – Is diversity lacking in certain areas of the company?
* Number and percentage of diversity employees being developed via Individual Development Plans
* Retention statistics
* Internal pay equity analysis

**☐ 2. Survey Staff:** In addition to these metrics, when formulating your strategy, it is advisable to solicit employee feedback (via survey) regarding their perceptions on where the company currently stands. You may find that there is a significant disconnect between employee perceptions and the actual data. That gap should be explored and addressed and may help **frame your discussion with leaders.**

**Gaining leadership “buy in” and building organizational support**

**☐ 1. Review support:**

If leaders have expressed some support for diversity efforts, gain their commitment and formalize a process to keep them involved and fully support your D E & I efforts on an ongoing basis. It can be helpful to provide survey data, exit interview excerpts or even a demonstration of how your website only shows pictures of non-diverse staff to build understanding of the issue.

They should understand that they are responsible for, and express commitment to, explaining the ‘why’s and how’s’ of this business change to other leaders and staff. Their leadership is critical in building broader organizational support. The use of talking points will keep the message consistent and will help minimize the chances for rambling and putting out unfulfillable promises.

**☐ 2. Frame talking points.**

Ideally, their talking points should center on a couple of key themes:

* It will help us produce better results, and it’s good for our business by ensuring all ideas are listened to and all employees feel supported in order to come to work fully ready to be successful.
* It is in alignment with our values.
* It’s the right thing to do.
* Acknowledge any shortcomings.
* An authentic ‘call to action’ for all employees to embrace the effort.

**☐ 3. Written Commitment/Mission Statement**

Consistent with the verbal explanations of the DE & I objectives, it is important to also develop supporting written documentation to clarify and formalize the effort. Discuss what you are willing to commit to as a company from the outset.

**☐ 4. Prepare Employee Communication:**

Written documentation should refrain from being too flowery, too lengthy or too preachy. Instead, rely on an elegantly simple approach to add clarity to an often-nuanced topic. Otherwise, you run the risk of complicating matters and creating unhelpful, ongoing debate.

**How do we establish goals?**

Use your baseline to establish both short-term and long-term DE & I goals. Providing the leaders with support and education/options is important, but they should all agree to the final goals.

 **☐ 1. Some examples of short-term goals may include:** • Diversity recruitment goals (#’s and/or %) • Diversity retention goals • Diversity promotion goals • Diversity representation in management goals • Training goals

**☐ 2. Longer-term goals may include things like:** • Mentorship and leadership development programs for diversity employees • Building relationships in the community (schools & other institutions) that will foster and improve your DE & I efforts • Establishing internal resource groups within the organization

**☐ 3. Establish S.M.A.R.T. goals:** Make sure that one person is assigned/ accountable for reaching each respective goal.

**☐ 4. Follow up:** Create a cross-functional, demographically diverse team (or task force) to drive the program and report progress.

**☐ 5: Champion:** Select a senior leader to direct the efforts of the team and serve as its champion. The leader will need to both drive results, and report updates/progress back to the leadership team.

 **☐ 6. Written Project Charter**: Best practice would be to also create a project charter, a project lead, and incorporate a project plan.

**Awareness, Education & Training**

**☐ 1. Organizational Statements of Support:** Many organizations feel an obligation to at least acknowledge the current equity issues. If you decide to do so, the message should be carefully crafted and measured. For example, the statement might include:

* A personal reflection (brief and not overly controversial – for most organizations, there are a wide variety of staff. Your goal is to help confused or fearful staff embrace diversity, not to turn them off altogether.)
* A brief statement of where your company is struggling. Again, no excessive apologies – This type of statement can be seen as an “easy way out” for people who have been frustrated with the lack of diversity efforts for years. You don’t get kudos for not doing the right thing. Wait until you have something to show for any new efforts.
* Emphasize that you have created a task force and will institute an ongoing review of diversity so that it never loses the focus it deserves.
* Describe why diversity is important (see points earlier in this document).

**☐ 2. Consider a Town Hall Kick-off Meeting** (refer to previously mentioned talking points) to set the tone and build enthusiasm.

In addition to the statement of support in step 1, describe some of the things your task force may focus on and put a call out to all employees for their input. Whatever your race – White, Black, Hispanic or otherwise, whatever your gender, age, religion or disability status, job or socio-economic status – If we don’t have everyone involved, we are not going to be successful. We want a truly representative sampling of employees to be involved.

Be prepared for questions and discussions. Remember that your goal is to ask employees to be kind, respectful and supportive of one another and their opinions, no matter what those might be.

**☐ 3. Embed DE & I into the employee lifecycle** • Recruitment • Interviews • Onboarding • Training & Development • Promotional opportunities • Core values • Meetings to discuss business results

☐ 4**. Measure Results**

 Be prepared to share your results (initially with the task force) and have open dialog regarding where the organization has fallen short. These conversations should produce some solutions which address the gaps.

**☐ 5. Create a training plan**

Contact Catapult to assist you with a well-structured training plan; they will tailor a blended approach to meet your specific needs. Training options to consider include:

* E-learning: Used primarily to build initial awareness, and typically should not be used as the only source of training
* Virtual classroom (Live On-line): Certainly, a big step up from e-learning, these sessions allow for break-out groups and much greater dialog and interaction
* Facilitated workshops: These sessions require a high degree of individual engagement coupled with strong group participation.
* Training for recruiters
* Training for managers and supervisors

**Resource Materials**

Search “diversity” on letscatapult.org (Resource Library) for additional resources, to include educational resources for you and your Executive Staff, as well as the DE&I Part 2 Checklist.

**Note**: Review state laws for state-specific provisions.

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