CADIA DEI ACCELERATOR PROGRAM:

Capstone Group #5

DEI Toolkit for Managers

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DEI Challenge & the WHY

Challenge: Middle managers often aren't equipped to lead DEI discussions or incorporate DEI initiatives into the everyday workplace.

Why: For DEI to be a success and the efforts to make an impact, **ALL** levels of the company have to make a commitment. <u>Middle managers are crucial to this effort.</u> They interact with employees daily and are responsible for running meetings, delegating tasks, hiring, reviewing and promoting employees, and more. Managers can transform a company value from intention to meaningful action and have a positive impact on the employee experience.

Solution: Create a toolkit to provide middle managers with DEI resources along with a blueprint for implementation.

DEI Toolkit for Managers

DEI Toolkit for Managers

▷ Business case for DEI
▷ DEI Definitions
▷ DEI Topics and Learning material
- Unconscious Bias
- Microaggressions
- Code Switching
▷ Conversation Starters
▷ Inclusive Leadership
▷ DEI Change Management Roadmap/Tips

Business Case for DEI

The WHY behind DEI

Business Case for DEI

Diverse and inclusive workplaces create better performing teams, which leads to better financial performance.

▷ DEI is a powerful tool for attracting and retaining talent
▷ Diversity of perspectives yields innovation

S&P500 year-over-year revenue correlated with board members' diversity before and during Covid-19
Source: BoardReady, 2021

$+58b
(+1.2%)

$-283b
(-3.9%)

Diverse boards   Less diverse boards

"boards with multi-dimensional diversity experienced less downside and even revenue growth throughout the pandemic."

**Understand that DEI is not a silver bullet to better financial performance.
You must be willing to do the work and change power structures to harness diversity.**

Managers and DEI

It is critical to have managers' support for Diversity, Equity, and Inclusion initiatives.
Managers interact with their employees daily and are responsible for running meetings, delegating tasks, reviewing and promoting employees, and more. Each of these are opportunities to champion company culture and DEI initiatives. When it comes down to it, managers are change agents in all aspects of business.

Studies show that when managers are committed to diversity, equity, and inclusion, there is less bias and fewer obstacles for minority employees.

Managers and DEI

Managers benefit from DEI initiatives, too.
Not only are managers supporting their employees when they commit to DEI principles, they also stand to benefit by having more cohesive, committed, and effective teams.

- Inclusive companies are more likely to hit financial goals, which often correlate to bonuses and raises for all employees.
  DEI helps your employees feel safe and valued, so they can share their opinions and are more likely to stay with the company for longer.
- Diverse teams are more innovative, make better decisions, and are more engaged.

Bottom line: DEI makes teams more effective and efficient.

Guidelines for using this toolkit

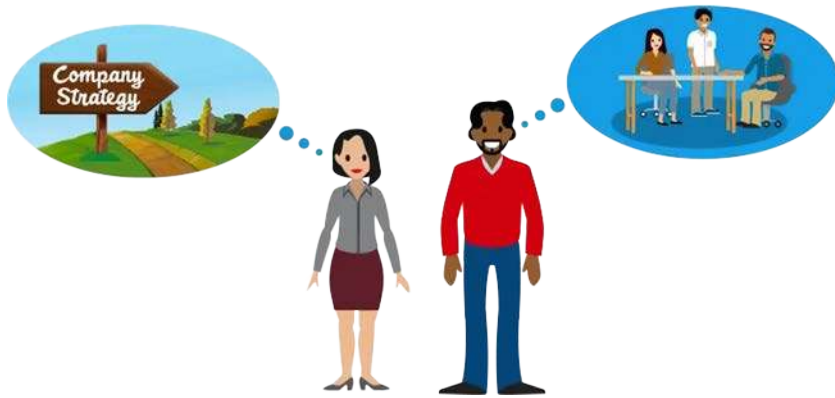*Image: salesforce*

This is a RESOURCE to help LEARN and INCORPORATE DEI into your organization.

Managers:

1. Use the toolkit to learn about DEI
2. Use each "lesson" in the toolkit as a blueprint for talking to your team about DEI
3. Practice inclusive leadership
4. Work on implementing DEI change management within your own teams

Leadership:

1. Use the toolkit to learn about DEI
2. Encourage your managers to use the toolkit as a resource when speaking to their teams about DEI
3. Practice inclusive leadership
4. Incorporate the DEI change management strategy into your organization

DEI Definitions

**Concepts to improve understanding**

Diversity

Diversity is the range of human differences, including but not limited to race, ethnicity, gender, gender identity, sexual orientation, age, social class, physical ability or attributes, religious or ethical values system, national origin, and political beliefs.

•Watch: https://youtu.be/7G0OUHnCudw

Diversity is not one-dimensional

Intersectionality - The concept of intersectionality describes the ways in which systems of inequality based on gender, race, ethnicity, sexual orientation, gender identity, disability, class and other forms of discrimination "intersect" to create unique dynamics and effects.
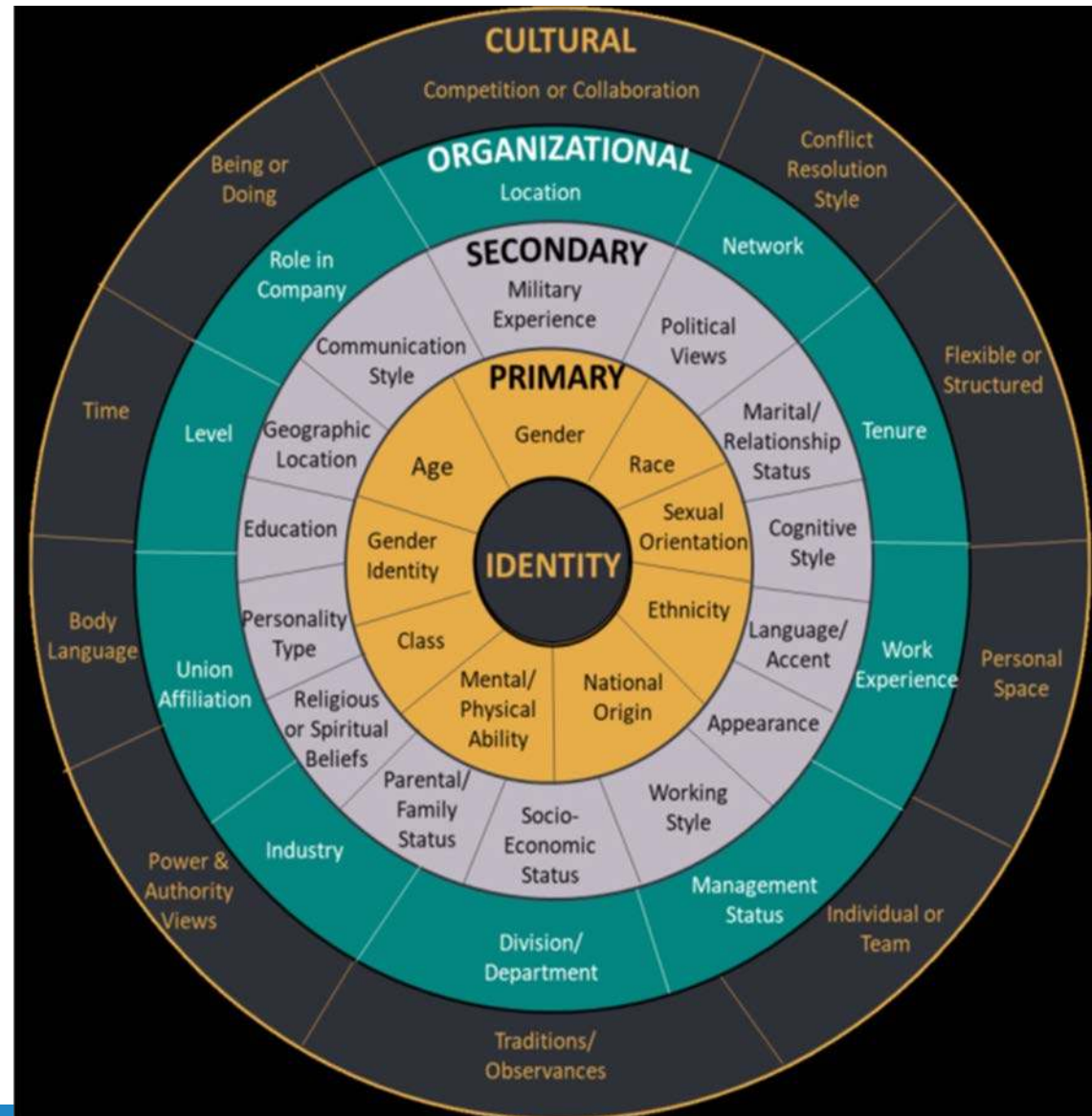
Equity

The term "equity" refers to fairness and justice and is distinguished from equality: whereas equality means providing the same to all, equity means recognizing that we do not all start from the same place and must acknowledge and adjust imbalances. The process is ongoing, requiring us to overcome intentional and unintentional barriers arising from bias or systemic structures.

•**Equity** can be understood as the <u>means</u>, and **equality** as the <u>end</u>. **Equity leads to equality**.

Equity is not going to happen organically. It takes *intention, perseverance and <u>constant</u> evaluation.*

Inclusion

Inclusion is **the culture in which the mix of people can come to work**, feel comfortable and confident to be themselves, work in a way that suits them and delivers your business needs. Inclusion will ensure that everyone feels valued and importantly, <u>adds value</u>.

Inclusive leadership - leaders who are aware of their own biases and preferences, actively seek out and consider different views and perspectives to inform better decision-making.

➢ The traits which define an inclusive mindset include **respect for others, open-mindedness, curiosity, cultural competence, kindness, lack of ego, and empathy**.

A good way to think about inclusion is that it is <u>active, intentional and ongoing engagement</u> with diversity in ways that increase awareness, content knowledge, cognitive sophistication and empathic understanding of the complex ways individuals interact within systems and institutions. It is the act of creating involvement, environments and empowerment in which any individual or group can be and feel welcomed, respected, supported and valued to fully participate.

DIVERSITY   INCLUSION
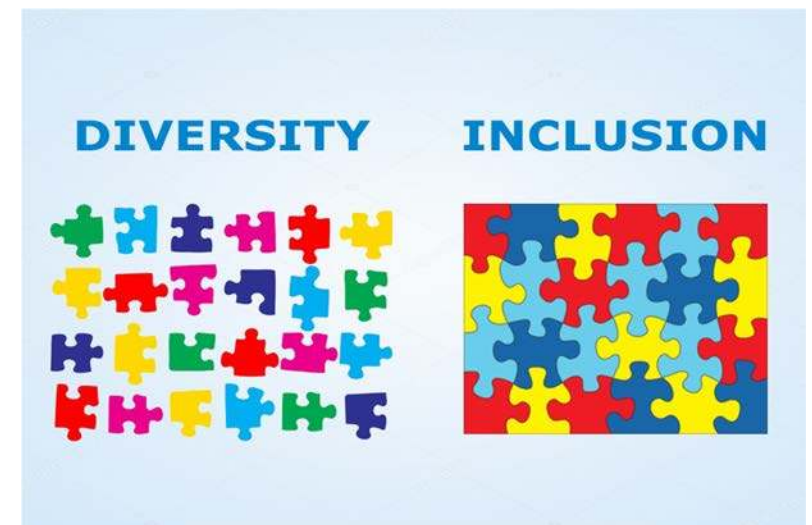
"Diversity is a **FACT**. Equity is a **CHOICE**. Including is an **ACTION**. Belonging is an **OUTCOME**."

DEI Strategist Arthur Chan

DEI Topics & Learning Material

Concepts to improve understanding

Unconscious Bias

Social stereotypes about certain groups of people that individuals form outside their own conscious awareness. Everyone holds unconscious beliefs about various social and identity groups, and these biases stem from one's tendency to organize social worlds by categorizing.

Use these links to review the material and reflect on your own unconscious bias and explore how the brain functions to develop quick judgements.

Next Steps: Share the learning material with your team and have them pre-watch the videos and also take two of the unconscious bias assessments prior to coming back together as a team. They should be encouraged to have personal reflection on the feedback at the end of the assessments, however results should remain private unless they choose to share. This is to be a supportive and open discussion with your employees to listen and learn together. It is about growing and understanding, not about test results.

Watch: **Unconscious Bias At Work**

https://www.youtube.com/watch?v=NW5s_-Nl3JE

Watch: **Worlds Apart**

https://www.youtube.com/watch?v=etIqln7vT4w

Watch: **The Look**

YouTubehttps://www.youtube.com/watch?v=H_Kip NvujKo

 Unconscious Bias assessments

https://implicit.harvard.edu/implicit/takeatest.html

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Microaggressions

Recognizing and Avoiding Microaggressions

A term used for **commonplace daily verbal, behavioral or environmental slights**, whether intentional or unintentional, that communicate hostile, derogatory, or negative attitudes toward stigmatized or culturally marginalized groups.

These videos and article introduce and explain acts of microaggressions and the impact they make on those affected by the often unintentional comments/actions.

Through understanding of this topic, the hope is that each person will be more thoughtful and educated in their communication and approach with one another.

Watch: Implicit Bias and Microaggressions: The Macro Impact of Small Acts.

Watch: Eliminating Microaggressions: The Next Level of Inclusion

Read: When and How to Respond to Microaggressions - Harvard Business Review

Code Switching

The practice of adjusting one's style of speech, appearance, behavior, and expression in ways that will optimize the comfort of others in exchange for fair treatment, quality service, and employment opportunities.

If you are among those that don't need to code-switch, then here are four steps you can take:

➢ Build empathy and mindfulness
➢ Check your bias
➢ Offer affirmations
➢ Be an active ally – beyond being an ally, challenge yourself to be an "accomplice" – meaning we are intentionally and actively involved in helping, rather than just cheering from the sidelines.

Watch: TEDx - The Cost of Code Switching - Chandra Arthur

https://www.youtube.com/watch?v=Bo3hRq2RnNI

Read: The Costs of Code-Switching

https://hbr.org/2019/11/the-costs-of-codeswitching

https://burrelles.com/code-switching-in-the-workplace-being-authentic-and-building-resilience/

DEI Conversation Starters

DEI Conversation Tips

As you begin the DEI journey with your team, it is important to remember you are not leading a strategic team meeting, you are supporting an open discussion. Create a **safe space** where everyone can be **heard** and **respected**. Come ready to <u>LISTEN</u> and ask questions to learn and understand; ask your team to do the same.

<u>A few tips to help you lead meaningful discussions with your team:</u>

➢ Start each conversation by encouraging openness, respect, and honesty
➢ Allow employees to share their thoughts and feelings without judgement
➢ Do not compel employees from marginalized groups to share traumatic experiences.
➢ Do not shy away from difficult subjects but rather embrace the discomfort surrounding an opportunity for growth.
➢ Be prepared to follow up. If there is any confusion or follow-up needed (for the team or individuals), determine how that next touchpoint or conversation will happen.

Active Listening Skills

- Ask open-ended questions
- Request clarification
- Be attentive
- Summarize
- Paraphrase
- Reflect feelings
- Be attuned to feelings
- Ask probing questions

Conversation Starters to Foster Inclusion and Team Cohesion

The below conversation starters can be used year-round to help promote diversity and inclusion. More than just raising awareness, meaningful conversations can leverage employees' unique experiences, perspectives, and viewpoints for the collective benefit of all. As we continue to work in remote environments, cultivate an office culture that encourages meaningful conversations to facilitate **relationship building, trust, and real connections.**

Below are a few conversation starters that may help you form connections with your colleagues/team and see them as individuals with unique experiences and stories to share:

- ➢ What does your name mean? Is there a story behind your name?
- ➢ What is the most memorable lesson you learned from a parent, guardian, or childhood mentor?
- ➢ What personal passion project are you working on right now?
- ➢ If you could start a charity, what would it be for?
- ➢ Share a time someone made you feel welcomed and accepted in a social group?
- ➢ What are some of your favorite childhood traditions or general celebrations?
- ➢ What culture would you like to learn more about?
- ➢ How would you describe the place you were born?
- ➢ What languages are spoken in your family?
- ➢ What historical event has most affected your life?
- ➢ What did you spend most of your time as a child?
- ➢ What three events in the last 5 years have greatly impacted you?

DEI Training Follow Up Conversation Starters

A key component of DEI training is the work that happens afterwards. Use this time to grow as a team together and share insights. After your team completes various DEI trainings, hold team meetings to regroup and discuss what was learned, how the trainings impacted associates, any light-bulb moments, key takeaways, etc.

The questions below can help get the conversation going:

➢ What surprised you most about what you have learned?
➢ How did you feel watching the videos?
➢ What ideas do you have about how we can impact our culture at work?
➢ What areas do you feel you still need to learn more about?
➢ How can we better support our colleagues in this area?
➢ What can we do to be more inclusive as a team?
➢ How might you broaden your thinking to be even more inclusive of diverse perspectives?
➢ What might you do to bring people "inside" and increase a sense of belonging?
➢ What strategies might you rely on to mitigate the impact of bias in the workplace?

"

"Meaningful insights come from meaningful dialogue."

Inclusive Leadership

Six Traits of Inclusive Leaders

Being an **inclusive leader** and having **empathy** are some of the most critical management skills needed in today's workplace. Read Deloitte's *Six Signature Traits of Inclusive Leadership* and think about how you can embody these traits, and their various elements, as you continue growing as a leader.

Read: Six Signature Traits of Inclusive Leadership
https://www2.deloitte.com/us/en/insights/topics/talent/six-signature-traits-of-inclusive-leadership.html

Cognizance — Because bias is a leader's Achilles' heel

Curiosity — Because different ideas and experiences enable growth

Courage — Because talking about imperfections involves personal risk taking

Cultural intelligence — Because not everyone sees the world through the same cultural frame

The six signature traits

Commitment — Because staying the course is hard

Collaboration — Because a diverse-thinking team is greater than the sum of its parts

Six traits	1	2	3	4	5	6
	Commitment	Courage	Cognizance of bias	Curiosity	Cultural intelligence	Collaboration
15 elements	Personal values	Humility	Self-regulation	Openess	Drive	Empowerment
	Belief in the business case	Bravery	Fair play	Perspective-taking	Knowledge	Teaming
				Coping with ambiguity	Adaptability	Voice

Source: Deloitte University Press

Creating an inclusive working environment

Common steps to take in your organization to foster an inclusive environment include:

➤ Diversity training (unconscious bias workshops, etc.)
➤ Recruiting pipeline targets
➤ Encouraging a culture of open feedback
➤ Conducting regular workplace culture surveys
➤ Supporting employee resource groups
➤ Providing mentoring and coaching opportunities
  ○ Studies have shown a link between mentoring programs and retention of talent

Tips to make the hiring process more inclusive:

➤ Hire for talent, not a resume
➤ Review language used in job descriptions for bias
➤ Remove names from resumes
➤ Ensure candidate pool and interview panel is diverse

Building relationships among a diverse workforce helps to build **understanding**, **value of differences**, and ultimately, **inclusion**.
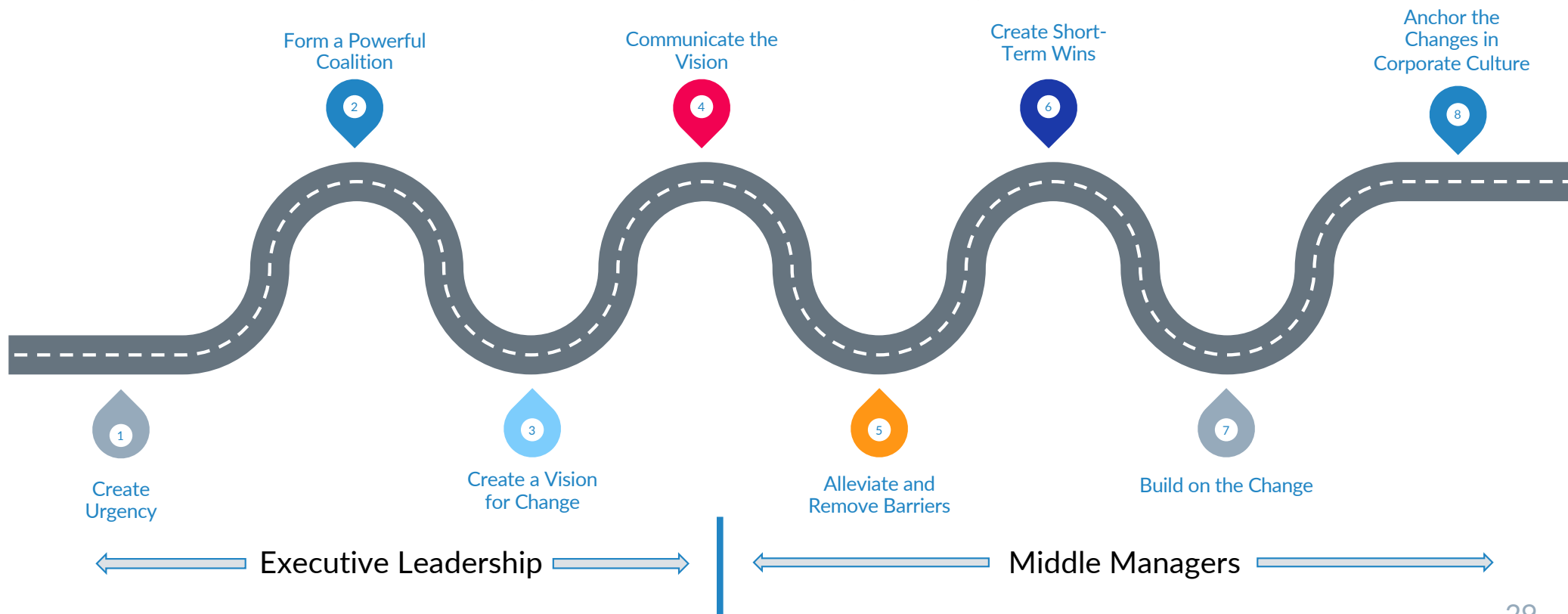
Inclusive Management Tips

➢ Make time for **connecting** with your team
➢ Prioritize **transparency** - even if it makes you look bad
➢ **Empower** your team - use *opportunity* as your primary development tool
➢ Foster competition *and* collaboration amongst your team
➢ Ask your team for input on how to improve your company's D&I in the workplace
➢ Provide a **safe space** for honest feedback
   ○ Listen to, act on and reward feedback to foster trust
➢ Incorporate regular shout-outs into your staff meetings to **recognize achievements** publicly

Lead by example - People pay attention to what leaders <u>do</u>, not just what they say

DEI Change Management Roadmap/Tips

DEI Change Management Roadmap

Although there are clear benefits to implementing Diversity, Equity and Inclusion initiatives, it is essential to recognize that these initiatives involve significant change, and should be implemented using a formal Change Management Approach.

Form a Powerful Coalition

2

Communicate the Vision

4

Create Short-Term Wins

6

Anchor the Changes in Corporate Culture

8

1

Create Urgency

3

Create a Vision for Change

5

Alleviate and Remove Barriers

7

Build on the Change

← Executive Leadership →   ← Middle Managers →

Change Management Roadmap/Tips

Because middle managers ultimately shape the environment and daily experiences of employees, they play a key role starting with **Step 4** shown in this model: ***Communicate the Vision for Change***.

Step One: Create Urgency

In this step, we determine the need for a DEI intervention. First, there needs to an understanding that the intervention is a necessity. A comprehensive audit that includes focus groups, questionnaires, record assessment, cultural competency continuum, and a SWOT analysis can accomplish this. Next, after completing the audit, a compelling business case will need to be presented. The business case should include the potential business impact, return on investment and the risk of not implementing the intervention.

Step Two: Form a Powerful Coalition

This step involves building a team of diversity champions, leaders, and sponsors. These are the individuals who will help gain buy-in from others in the organization. They will serve as influential DEI change agents that are needed for the change. They may also assist in creating and implementing the DEI intervention.

Step Three: Create a Vision for Change

In this step, a vision should be created for the DEI initiative. Where do you see the intervention going, and how will it make a difference in the organization? The vision should consider those who will disrupt the organization with the change and those who the change will impact. Without this, there can be an increased chance of resistance within the organization.

Change Management Roadmap/Tips

Step Four: Communicate the Vision

When sharing any change, ensure the message includes information that shows the change is purposeful, desirable and feasible. Because of the possible uncomfortable environment creating a DEI intervention can invite, communicating the vision appropriately is imperative. It is not only essential to communicate the change correctly, but also just as vital to have the suitable person share the vision. The message should be consistent, from the Executive Level, to people leaders, to all employees.

Step Five: Alleviate and Remove Barriers

Not understanding the need for a DEI intervention, not wanting the intervention and resisting the intervention are a few barriers middle managers may face when attempting to implement a new DEI intervention. Ask questions, utilize the resources available, and be transparent about what can and can't be accomplished.

Change Management Roadmap/Tips

Step Six: Create Short-Term Wins

Rolling out a new DEI intervention can be an enormous task, so celebrating the quick, small wins can lead to momentum. This is especially relevant for an incremental change that has various steps. Be sure to communicate your successes with stakeholders within the organization.

Step Seven: Build on the Change

The small wins are just the start. In this step, repetition is critical. Take the momentum from the small victories and build on it. Continue to communicate the vision within your team and the organization. Continue to celebrate small wins. Additionally, this is the opportunity to adapt to the change to "make it stick."

Step Eight: Anchor the Changes in Corporate Culture

In this step, the DEI intervention is part of the lived corporate culture. All employees are adjusting to the change. The vision is implemented, behaviors are changing and impact is taking place.

Reminders / Takeaways

- DEI is not "one size fits all"
- Tailor the approach to your staff/company
- Invest resources and budget - but more importantly time, attention and focus
- Value progress > perfection
- Multi-year journey
- Set goals and expectations

Leadership's DEI Responsibility -

- Set the tone (be change agents)
- Ensure DEI strategy is **aligned** with business goals
- Promote and encourage DEI initiatives
- Be transparent about what can and can't be accomplished
- Model inclusive behavior
- Call in/ out behavior
- Hold people managers accountable

Understand DEI is a marathon, not a sprint

WE ARE STRONGER
TOGETHER.

Sample Implementation Guide

1. HR leads implementation
2. Official training rollout to all people managers with a requirement for completion of all learning materials within one month
3. HR holds follow-up discussions with all people managers
   a. Goal being to answer any questions, provide additional insight/tips, etc.
4. People managers required to roll training material out to their respective teams
5. People managers to hold follow-up conversations with teams
6. HR to conduct employee surveys
7. People managers required to set DEI related performance goals for staff and themselves

Department responsible for implementing DEI toolkit will vary depending on the organization - could be a Leadership Development Org, DEI counsel/Ambassadors, etc.