

**“TAKING ACTION TO ADVANCE INCLUSION”
PARTICIPANT CHART NOTES
September 5, 2024**

COMMUNICATION (Internal and External)	
<i>Short-Term Actions</i>	<i>Long-Term Actions</i>
<ul style="list-style-type: none"> • Inclusive language • Understand target audience (customers, suppliers) • Showing DEI support • Research • Partner with DEI • Dedicated communication • Website accessibility • Accessible communication • Language • Make money / save money / avoid risk / amplify mission • Use communication styles: <ul style="list-style-type: none"> ○ Data – analytic ○ Story – expressive ○ Bullets – driver ○ People impact – amiable • Inclusive visual identity • Branding to vendors and community • What tools to use • Address non-verbal cues/inferences 	<ul style="list-style-type: none"> • Staff forums • Communications plan • Hearing from leadership • Establishing a voice • Relying on subject matter experts (SMEs) • Crisis plan • Role-playing • Accessible communication • Website accessibility • Align communication with strategy • Communicating and connecting with underrepresented stakeholders • Equity in communication • Keep communication relevant and fresh (engaging) • Shared identity in roles and communication • Translation services • Use technology to collapse barriers
Unique Barriers	
<ul style="list-style-type: none"> • Internal and external alignment to create clarity • Competing priorities • Change in leadership • Assumption of responsibility • Cultural awareness • Genuine – authentically present in narratives 	<ul style="list-style-type: none"> • Training for all • Crafting inclusive and meaningful messages • Trigger words and DEI • Hierarchy • Over- versus under-communicating • Digital divide/Wi-Fi access • Lack of communication from leaders

POLICIES & PROCEDURES	
<i>Short-Term Actions</i>	<i>Long-Term Actions</i>
<ul style="list-style-type: none"> • Define words/phrases • Shared language • Mission, vision, values, charter, purpose, strategy • Shared goals • Make money / save money / avoid risk / amplify mission • Intentional interactions in developing policies and procedures • Review current policies/procedures with DEI lens • Code of ethics and business • Review and scrub anything that is not inclusive/outdated language • Shift to more approachable language • Incentives to act/identify motivations • Incorporate into evaluations • Compensation study 	<ul style="list-style-type: none"> • Grievance process – external • Vendor procedures • Supplier diversity strategy • Hiring policies/practices • Required training • Benefits and compensation • Accountability • Board governance • Continuous review of policies and procedures (annual review) • Rewriting job descriptions • Adding DEI elements to company competencies/performance management tools • Integrating stakeholders into policy and procedure development
<i>Unique Barriers</i>	
<ul style="list-style-type: none"> • Leaders as founders • Follow-through/accountability/culture • Adoption of change and leadership • Inclusive language (pronouns and transition and language) • Outdated language and expectations • Inconsistent policies/enforce existing policies 	<ul style="list-style-type: none"> • Bureaucracy • Fear of retaliations • Siloed decisions made for all by a few • Not informing individuals of how policies will impact • Ambiguity

PROFESSIONAL DEVELOPMENT	
<i>Short-Term Actions</i>	<i>Long-Term Actions</i>
<ul style="list-style-type: none"> • Data collection • Assess current state • Training/mentorship – who? What? • Needs-based assessment • Forecasting • Reinforcement? Who follows up? What's effective? • Personal development plan • Having an evaluation system that supports professional development (short and long) 	<ul style="list-style-type: none"> • Stratification by group • Built into the annual budget • Sponsorship • Ongoing training – expand and evolve • Tied to clear strategy and leadership expectations • Tied to pipeline and succession • Social capital • Exit interviews • Reports • Consistency • Ongoing training • Certification model • Long-term coaching (leadership) • Leadership forum/training • Consultancy (maybe \$\$) • Long-term path/plan to build upon • Relevance to current needs • Mission statement (DEI)
<i>Unique Barriers</i>	
<ul style="list-style-type: none"> • No vision from leadership • Time • Money • Favoritism of who gets to • Social capital priorities • Mandatory training not sufficient • Not impactful • No implementation • Access to training • Lack of flexibility • Lack of clarity of purpose • Methodology (how) • Logistics 	<ul style="list-style-type: none"> • Different perspectives • Training as part of onboarding • Dedicated team (Learning & Development) • Lack of succession planning • Quality of staff • Turnover rates • Standards • The term “professional development” • Training feels like a chore • Lack of tenure → role • Lack of accountability • No room for growth

RECRUITMENT & HIRING	
<i>Short-Term Actions</i>	<i>Long-Term Actions</i>
<ul style="list-style-type: none"> • Sending DEI representation to recruitment events • Expanding the pool • Company branding • Putting DEI commitment in job description • Having DEI-focused question during interview process • Improving community partnerships (i.e. paid internships) • Having diverse interview panels • Diverse job posting sites • Require to train before hiring/working • Flexibility and inclusivity in job requirements • Unconscious bias training • Standardized process • Hiring the right team for belonging, not for fit 	<ul style="list-style-type: none"> • Starting internships with minority-serving institutions beyond HBCUs • Performing barrier analysis on recruitment and hiring process • Feedback questionnaire after hiring • Dedicated staff role • Track applicant pool demographics (blind) • Mentorship program • Data analysis to determine gaps (de-segregated data) • Must accommodate diverse candidates • Unconscious bias training • Standardized process • Transparent about job posting • Blind resume review • Talent advisory review of interview questions
<i>Unique Barriers</i>	
<ul style="list-style-type: none"> • Accessibility issues • Company culture not primed for this • Limited diverse groups we look at • Negative reputation • Capacity and time • Lack of diversity strategy (“it’s not a problem”) • Not tracking demographics • Limited technology for tracking • Location 	<ul style="list-style-type: none"> • Focus on educational success and not experience (lived experience) • How we work (flex/work) • Lack of diversity of thought • Taking equity out of the conversation • Erasure of the DEI conversation • Burnout • Bias • Language

STRUCTURES (Staffing, Council/Committee, ERGs, etc.)	
<i>Short-Term Actions</i>	<i>Long-Term Actions</i>
<ul style="list-style-type: none"> • Inclusion committee • Review goals and responsibilities • Increase in diverse workforce composition • Representation for multiple departments in committees • Cross-functional teams, not just HR • Doing the work • Committee bylaws/policies that are inclusive • Add budget for operations • Small wins to celebrate • Roles • Utilize consultation (fresh pair of eyes) • KPI for every leader • Q goals • HR • Structures within ERGs – charts • Be aware of hybrid environment 	<ul style="list-style-type: none"> • Strategic plan and sustainability • Support of leadership and higher levels of organization • Voice inclusion from all departments • Committee assessments • Chief DEI Officer with funding and staff • Keep the work going • Time and resource commitment • Strategic mission • Integrate DEI into each unit and overall mission • Develop system of compensation for participation
<i>Unique Barriers</i>	
<ul style="list-style-type: none"> • ERGs becoming exclusive • Fear of ERGs • How to choose members of ERGs • Hire the right candidate vs. able bodied (favoritism/bias) • Multi-generational understanding of different perspectives • Resources • Institutionalization 	<ul style="list-style-type: none"> • Buy-in support ongoing/sustained commitment • Reverse discrimination • Exclusionary idea of ERG • Budget • Overlap in representation (ERGs and DEI committee) • DEI in HR – more spread out but someone in HR in it (as member)

OTHER	
<i>Short-Term Actions</i>	<i>Long-Term Actions</i>
<ul style="list-style-type: none"> • Global view → less US-centric • Inclusion and Belonging vs. DEI • Equity assessment at the beginning to assess where you are as an organization and where you can improve • Evaluation of program – measure success 	<ul style="list-style-type: none"> • Diverse supply chain