DIVERSITY, EQUITY AND INCLUSION PLAYBOOK

Building Industry and Land Development Association (BILD)

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Message From The Co-Chairs

Diversity, Equity and Inclusion (DE&I) can help your organization evolve, innovate, problem solve, and thrive. The moral case alone is reason enough to take charge, enact change, and push forward. We recognize that not everyone's path for DE&I is the same and that each company, their respective teams, and individuals within an organization may all be at different stages in their journey.

In response to a call to action from our industry, BILD created the People and Culture Committee whose initial undertaking included creating a DE&I Playbook. This hands-on resource combines theory with tangible action so that you can start (or continue) your DE&I journey today, regardless of the stage your company may currently be in its DE&I efforts. Whether this is a new path for your organization, or one you have been on for a while, we have designed this playbook to be useful for all stages of DE&I.

Our DE&I Playbook team worked with their heads and hearts to provide this multi-layer, multi-step resource that will help your organization see and hear with fewer blinders, challenge assumptions, enhance belonging, and ensure all have a chance to expand to their fullest potential. This step-by-step plan can be adjusted as needed to cultivate a culture that values continual learning and an environment that fosters true belonging.

We are hoping this playbook will not only be a resource for you on your DE&I journey, but will also instill a commitment to taking the personal and collective journey that challenges our assumptions and builds leadership character by continually educating ourselves and each other on DE&I. The more knowledge we share and the more action we take, the larger our combined influence becomes.

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Acknowledgements

The Basics

In December of 2020, BILD revealed its Diversity Equity and Inclusion Statement. The statement outlines how the Association and its membership will be working to make positive changes in our workplaces to make them more reflective of the richness of the population of the GTA. BILD's statement was also accompanied by a [Leaders' Pledge](#)—to date signed by more than 70 BILD members—that allows the leaders of member companies to make a similar commitment on behalf of their organizations.

What is BILD's Diversity, Equity & Inclusion Statement?

BILD's statement, approved by its Board of Directors in the Fall of 2020 and released at its Annual General Meeting in December 2020, is as follows:

Members of the Building Industry and Land Development Association (BILD) create communities for diverse and vibrant populations. We believe in order to meet the real estate needs of all GTA residents, to create an industry that is socially responsible, sustainable, and successful, it is essential to have a workforce that reflects this diversity.

We recognize that differences in race, age, gender, sexual orientation, cultural background, physical, and mental ability bring richness to our collective work and living environments. Inclusiveness and equity fuel innovation and allow us to create communities that meet the needs of all GTA residents.

BILD resolves to proactively reduce the causes of workplace racism by facilitating awareness and education in the industry and work to promote diversity, equity and inclusion. We stand by a zero-tolerance policy against discrimination, racism or oppression in any form in our industry, workplaces or jobsites.

BILD Guideline Defining Zero Tolerance

Disclaimer: this guideline is intended to provide you with a general overview and is not intended as legal advice. We encourage you to seek legal counsel when needed. Under the *Occupational Health and Safety Act*, employers are required to have a Workplace Violence and Harassment Policy. We anticipate that members will choose to incorporate some of the guidance below into their existing mandatory policies and training.

What does 'zero tolerance' mean?

Zero tolerance is a practice of setting high standards of conduct for not tolerating discriminatory behaviour. An employer's commitment to zero tolerance for discrimination means that if there is a complaint, or a known act of discrimination, a fair and impartial investigation will be conducted and appropriate action will be taken based on the outcome. Appropriate action means any kind of corrective action, including progressive discipline up to and including termination.

Adhering to a zero-tolerance policy does not mean automatic dismissal if a concern is brought forward. From a legal standpoint, automatic dismissal is not a viable option without understanding both sides of the situation directly from the parties involved and any witnesses. This is why a fair and impartial investigation is a key component within the zero-tolerance standard.

It is important to understand that zero tolerance extends beyond complaints or concerns between two employees of the same company: it also encompasses those that you do business or interact with, such as vendors, clients and other contractors. Even if there is a situation where a complaint is made against an external party, it must still have an impartial investigation (to the best of your ability) and, where substantiated, corrective and/or preventative measures must be taken.

Zero Tolerance Best Practices

Policies:

Policies should define what zero-tolerance means and explain that each reported incident of the inappropriate behaviour will be investigated and addressed by the organization.

For example, zero tolerance for discrimination means that once a complaint is brought forward, or the company has knowledge that discriminatory behaviour is taking place, a fair and impartial investigation must take place in a timely manner. In these situations, the investigation should be initiated as soon as possible. After the fair and impartial investigation is completed, and if the complaint is substantiated (or merit determined), consequences will reflect the severity of the conduct and disciplinary action may range from a verbal warning up to and including termination.

Policies must also outline the fair and impartial investigation process and a non-retaliation requirement.

In Good Faith:

Policies should define how complaints are brought forward. Within this, policies can outline the expectation of concerns being brought forward 'in good faith.' This means complaints brought forward by any stakeholder must be truthful and should provide all the information the employee knows regarding the matter so that a fair and comprehensive investigation can occur and the matter can be addressed in an appropriate and timely manner. Your policy can also outline that you, the company, will take seriously any reports, which upon investigation, prove not to be substantiated (unless made in good faith pursuant to your policy) or which prove to have been made maliciously or knowingly to be false. You can also include that you will regard the making of any deliberately false or malicious allegations by any employee a serious disciplinary offence, which will result in corrective action, up to and including immediate termination of employment without notice or pay in lieu of notice.

Legislative Requirements: Investigations

Overview

Having a fair and impartial investigation process for complaints of discrimination or harassment has been a long-standing requirement under the law. In Ontario, this requirement falls within the *Occupational Health and Safety Act*, as well as the Ontario Human Rights Code. Other provinces have similar requirements—please consult your province's requirements. Regardless of intent, once a complaint is brought forward, or the company has knowledge that discriminatory behaviour is taking place, the company is required to conduct an investigation that is appropriate in the circumstances. Additionally, depending on the situation, an external investigator may be required. Whether the investigation is being conducted in-house or by an external investigator, the investigator must have proper training and experience of the investigative process, producing summary reporting, action plans, and recommending corrective actions.

Investigations should be completed within 90 days following receipt of a complaint.

Requirements

Under the *Occupational Health and Safety Act*, there are minimum requirements for an investigation, which are:

1. Each situation must be treated on an individual basis and investigated impartially;
2. All details of the complaint and investigation must be kept confidential (to the best of the company's ability) to protect the integrity of the investigation;
3. Non-retaliation measures must be put in place to protect the complainant;
4. Consistent application of the policy and enforcement is key to maintaining fair practices;
5. The respondent should be informed of the alleged misconduct and provided an opportunity to give their side of the story.

Once an investigation is complete and corrective actions are being discussed, severity of the conduct and severity of the corrective action must be balanced.

It is important to note that workplace violence and workplace harassment also fall within the *Occupational Health and Safety Act*. As such, the *Occupational Health and Safety Act* also sets out roles and responsibilities of various workplace parties when enforcing or investigating workplace violence and/or workplace harassment.

Non-Retaliation

Employees are protected from any form of retaliation regarding a complaint of harassment or discrimination. It is important that your policy outlines that you will not tolerate any form of retaliation, including any change in the terms or conditions of employment against an employee who acts in good faith (i.e. sincerely) and with reasonable grounds for believing that a violation of the policy has occurred or who expressed concern, witnessed, complained about, resisted discrimination, or participated in any investigation regarding same.

Scope

Your policy should make it clear that the terms and expectations apply to anyone you do business with or with whom your employees interact. This means that it applies to your trade partners, sub-trades, unionized employees, external consultants or anyone else your employees encounter.

About BILD's Diversity, Equity and Inclusion (DE&I) Playbook

The playbook has been assembled by BILD's People and Culture Committee to provide guidance, resources, and a path for member companies' diversity, equity and inclusion programs and policies.

The playbook is structured in such a way that regardless of the point your company finds itself on this important journey, and regardless of its size or location(s), it will provide you with the tools, resources and examples to support your continued enhancement of DE&I within your organization.

This playbook is based on best practices from the industry and other sources. It should not be seen as exhaustive, and members should look to multiple sources to seek guidance for the development and implementation of DE&I within their workplaces. This Playbook **is not** a replacement for legal guidance and advice and, when in doubt, members are strongly advised to seek outside legal guidance.

For those companies that are just embarking on this important journey, it is critical to understand that organizational culture change is an evolutionary process. It takes time to make meaningful and lasting changes within workplaces specifically and across society in general. It cannot be overstated that effectively implementing diversity, equity and inclusion within a workplace **is not** a stand-alone project or simply a human resources function—a project to be managed and then 'put on a shelf.' Successfully integrating DE&I across all facets of a business requires leadership support, organizational buy-in, time and a concerted effort. It can best be characterized as a marathon, not a sprint. And by simply taking the basic steps of raising awareness, you are helping your organization embark on this important and meaningful journey.

Diversity, equity and inclusion scale

A member-companies survey conducted by BILD in January and February of 2021 found that respondents had varying knowledge of diversity, equity and inclusion and were at greatly varying levels of implementation. For example, roughly 25 per cent of respondents self-characterized as being unaware of DE&I or had just started the process of internal education, while another 25 per cent characterized themselves as very well advanced (sustaining or leading), with all other respondents identifying at some point within the range between.

This tremendous range is actually reflective of the broader implementation of diversity, equity and inclusion across Canadian industry and business sectors.

There are many publicly available scales for determining where your company/organization may be on the diversity, equity and inclusion continuum. Below is simply one example.

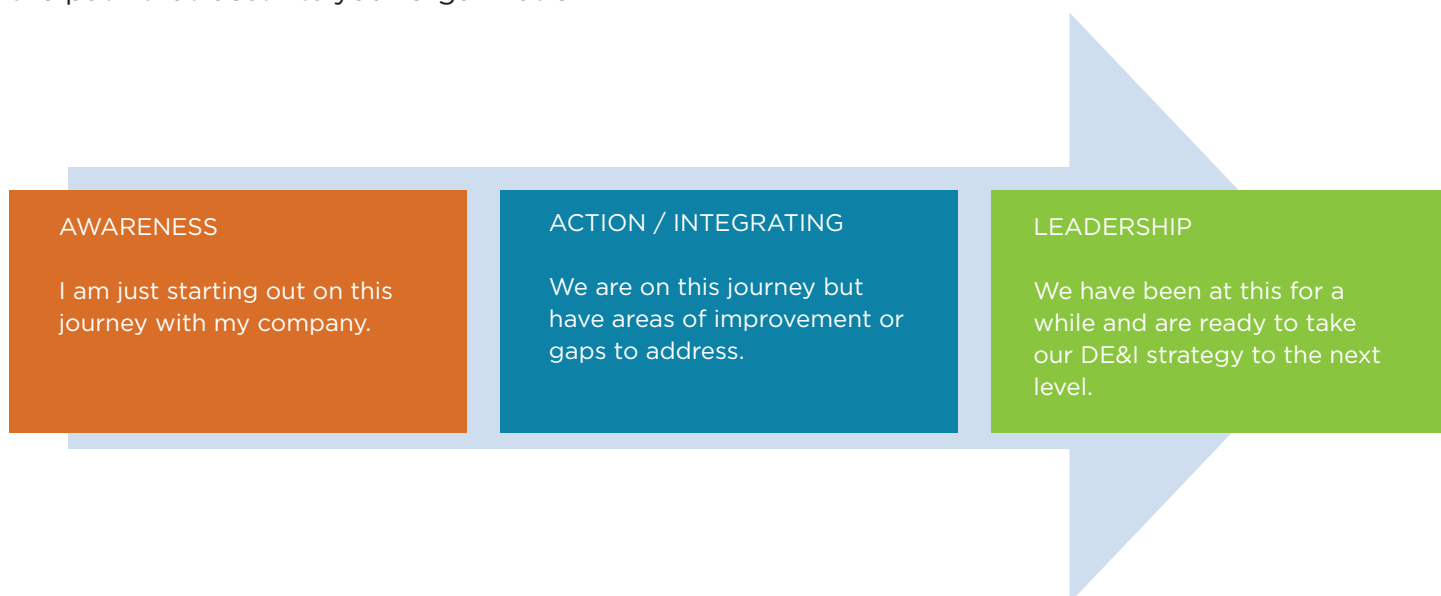| Level 1: Unaware	Level 2: Aware	Level 3: Integrating	Level 4: Sustaining	Level 5: Leading

Due to the constantly evolving nature of this important topic, every company (and in many cases, different people within a company) will invariably be at a different place on this scale. This is perfectly normal. Factors that can impact placement include the level of knowledge and understanding regarding DE&I. In fact, a lack of knowledge and/or awareness is perhaps one of the most significant barriers to be overcome for any individual or organization.

Other factors that impact where a company may currently sit on the scale include the organization's capacity from a people and skills perspective, as you will discover many of the topics carry with them a high degree of sensitivity, and the level of resources a company can devote to DE&I, which may translate into the pace and scale of adoption and integration.

How to Use this Playbook

In order to simplify the DE&I journey for member companies, this playbook has broken down each key step, from strategy development through implementation and evaluation into three buckets— Awareness, Action or Leadership—so that you can choose your own journey. These buckets in essence are a streamlined DE&I scale. You may still be establishing awareness in some areas, yet leading in others. That is not uncommon and is totally understandable. This enables you to choose the path that best fits your organization.

AWARENESS	ACTION / INTEGRATING	LEADERSHIP
I am just starting out on this journey with my company.	We are on this journey but have areas of improvement or gaps to address.	We have been at this for a while and are ready to take our DE&I strategy to the next level.

This playbook is also broken down into individual sections, with each section covering a discrete part of your DE&I journey, from determining who should be the lead within your company/ organization, right through to how to measure implementation and adjust. These sections are listed in the figure on the next page.

You can choose to follow the sections in the order they are presented in this playbook, jump in at the appropriate step if you already have DE&I initiatives underway, or simply use an individual step as a resource for a particular project.

In addition, each step contains links to outside resource information. As this information is continually evolving, BILD has created a special section on its website where the latest resources can be found.

The DE&I Journey

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│   Choose Lead for DE&I  │          │  Obtain Business Commitment     │
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┌─────────────────────────┐          ┌──────────────────────────────────┐
│   Inform Your Strategy  │          │      Define Strategy/Plan       │
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┌─────────────────────────┐  ────►   ┌──────────────────────────────────┐
│   Create Your Strategy  │          │        Vision & Mission         │
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│     DE&I Committee      │          │         Communications          │
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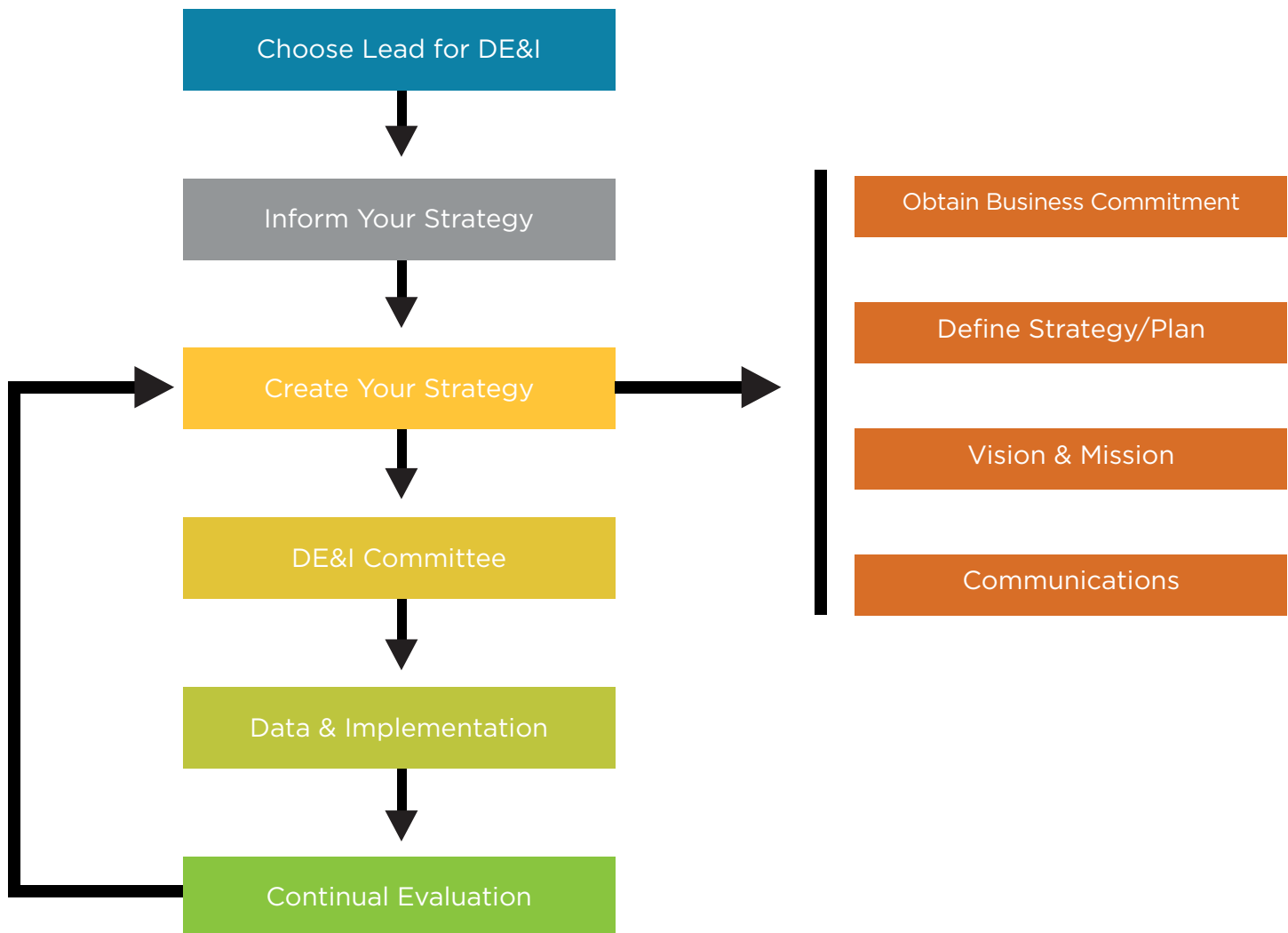
Determine Your DE&I Lead

The first decision that needs to be made is to determine who should lead DE&I within your organization. While this may be the same as the executive sponsor (see Executive Sponsor section), more often than not the day-to-day functions on a vibrant DE&I initiative are better suited for a senior management position that has the time and resources to dedicate to the DE&I journey within your organization.

From a functional perspective, the natural tendency can often be to see DE&I as a human resources (HR) initiative and thus to place responsibility for DE&I within the HR department. While this may be how your company decides to proceed, it's important to note that DE&I is a business strategy and as such it should not necessarily reside within HR. Regardless of who is chosen to lead DE&I and what function has primary responsibility to deliver against the strategy, it is important to select a lead who has a passion and commitment for furthering diversity, equity and inclusion within your company.

Inform Your Strategy and Track Your Activity

Regardless of what stage your organization is in its DE&I journey (awareness, action or leadership), measurement will be key to tracking progress. As is often stated, "what gets measured gets done." It is strongly recommended that you begin with a few fundamental pieces of information and expand that data set as you progress in your DE&I maturity.

This can be as simple as a basic, current workforce profile, a baseline of where your organization sits with policies, or an internal assessment of the degree of awareness or understanding of DE&I. As a word of caution, to avoid unintended consequences, the use of employee surveys and other outward-facing employee measurement tools is not recommended until the organization and the workforce have been suitably exposed to core concepts and rationales through workshops and communications.

As you progress in your journey, data tracking can be expanded, including more demographic information and more comprehensive attitudinal data and other information sourced from employees. As your data set expands, your organization will have a broader set of metrics upon which more robust decisions can be made.

One important note: always remember that any additional information gathered from employees (particularly demographic information) should be considered highly sensitive and confidential. It should only be gathered on a voluntary basis, only shared with the permission of the employee, and on an aggregate basis.

What It Could Look Like

AWARENESS	ACTION	LEADERSHIP
• Assessing readily available basic data samples (i.e. age and gender data) and analysis vs. comparable companies/broader society • Starting to have conversations with employees • Internal assessment of DE&I awareness • Existence or number of policies	• Leadership attitudes and support • Tracking knowledge, awareness and support, and data on an ongoing basis during educational seminars and workshops • Providing an optional survey to all new employees at time of hire with demographic information	• Optional surveys for employees to voluntarily share their demographic information • Tracking hiring metrics and retention metrics of key underrepresented groups

Creating a Strategy to Match Your Business Objectives

This section of the playbook is dedicated to outlining how to create a diversity, equity and inclusion strategy for your company that dovetails with its organizational and business objectives. The section provides step-by-step guidance on developing the groundwork for any successful DE&I initiative.

It outlines:

- how to cultivate commitment and senior leadership support within your organization.
- how to develop a DE&I strategy and action plan.
- how to ensure your mission and vision align with strategy and action plan.
- how to best communicate with your employees and across the organization.

Where possible, links to useful resources and templates are provided.

1. Develop your DE&I commitment and buy-in within your leadership team

Step 1: How DE&I can support your business objectives

Have an in-depth planning discussion to review your company's business goals and determine how a DE&I strategy can further support or align with them. The key here is to consider diversity, equity and inclusion as a business tool that enables maximization of workforce potential, as a vehicle for the attraction and retention of top talent and/or its potential from a brand and company reputation perspective.

These discussions should consider the positive, i.e. how DE&I can contribute, but also the negative or opportunity-cost perspective, i.e. what are the implications of not implementing a DE&I strategy?

From the perspective of a builder/developer or renovator, consider how DE&I can:

- help your company address the labour gap within the industry
- help the lack of skilled candidates for technical roles
- facilitate increased employee engagement
- better position your company for the war on talent and the need for greater attraction and retention (increasing the attractiveness of your company to candidates and retention of top talent)
- help position your company and/or increase your company/brand reputation within your key target markets
- help increase your company's prospects for innovation by broadening the knowledge and skill base of your organization

Developing Your Business Case

Understanding and communicating the business case for DE&I within your organization is a fundamental component of your strategy and is also important in obtaining the support necessary to move your initiative forward. The following section outlines the major buckets on understanding and developing your business case. Remember that as each organization is unique, there is no one correct business case and it's okay if the business case evolves over time.

Generally, a for-profit company has a competitive advantage when it can demonstrate some means of differentiating itself from competitors in a way that will create an economic impact for the company.

This advantage can manifest as increased market share, increased customers, increased sales, higher levels of customer satisfaction, or increased ability to attract and retain talent, among other things.

Competitive advantage may not be an important driver in some public sector or not-for-profit organizations. A public sector employer that has a monopoly on providing a service in a given jurisdiction does not have to compete for customers/clients/service users/patients/students. However, even these employers are in a competition for talent. Also, where there are multiple service providers competing for service users and funding, competitive advantage can become an important consideration.

Regardless, every organization has a budget, wants to deliver its products or services more effectively and efficiently, and has customers/clients/service users/patients/students and employees.

As with all aspects of this toolkit, we recommend using the sections and the language that will resonate within your organization.

If the term 'competitive advantage' is not appropriate within your organization, this section could be called organizational benefits.

For this section of your strategy document, you could pull some of the most salient points from your business case or imperative document.

Below are some suggestions of ways to frame how your diversity and inclusion strategy will contribute to organizational benefits or competitive advantage.

- **War for talent:** inclusive employers are more attractive employers.
- **Employee engagement:** inclusion has been linked to engagement. Disengaged employees cost money. Engaged employees provide better service, speak more favourably about your organization, go above and beyond more, and have less absenteeism and lower voluntary turnover.
- **Succession planning:** invest now for your pipeline of future leaders.
- **Think global:** better global picture/context for international or cross-cultural business.
- **Market opportunity:** better business development opportunities in a changing marketplace.
- **Mirror the marketplace:** reflect your customer and your customer's customer.
- **Breed innovation:** diversity in teams leads to increased creativity, improved products and services.
- **Your brand:** set yourself apart, creating employee and customer loyalty.
- **Resiliency:** increased ability to respond to change.
- **Social responsibility requirements:**
  - Canadian Centre for Diversity and Inclusion (www.ccdi.ca)
  - Sustainability/CSR reporting requirements
  - Diversity reporting for GRI (Global Reporting Initiative) Social Indicators
  - Social license to operate in some jurisdictions
- **Reputation, history:** Overcoming or mitigating past reputational issues, human rights, discrimination or harassment cases.
- **Community partnership/investment/engagement**
- **External stakeholder perception:** How are you viewed by those with little or no touchpoints with your organization (how is your public image)?

What It Could Look Like

AWARENESS	ACTION	LEADERSHIP
• Research the business case on why DE&I is beneficial to your organization	• Get your leaders involved in DE&I by garnering their input and ideas.	• Why it is important to leadership personally, not just looking at a business case, but talking about why it is important to them as individuals. • The personal narrative around DE&I; why is it important and integrate this around storytelling. • Increases loyalty to the cause. • Realize that asking for a business case can be dehumanizing because underneath there is white supremacy. Make a case why the 'other' should be treated as an equal human being, seen and valued.

Step 2: Senior leadership perspective and buy-in:

After you have a clear perspective of the benefits of DE&I initiatives for your company, the next step is to discuss your findings: have your company's leadership state their personal reasons for improving diversity and belonging in order to garner greater buy-in.

Having senior leadership champion the initiative is a critical success factor. Without at least one executive sponsor, the initiative will likely end before it starts.

Executive Sponsor

The first step is to find an executive sponsor—a member of the senior leadership team who can act as a champion for the project. When considering who to approach, here are a number of attributes of a successful executive sponsor to consider:

1. Walks the Walk

A good executive sponsor candidate will be someone who is well-respected by his or her peers within your organization. And it's an added bonus if that executive is also respected throughout your industry. Your sponsor should be someone who understands company culture and can influence organization-wide action, even if the sponsor is not your company's most senior leader.

2. Is Action-Oriented

Look for a leader who can call your organization to action for business continuity and who will champion DE&I within your senior leadership team.

3. Knows the Ins and Outs

Make sure your executive sponsor candidate knows the ins and outs of your business, including a general understanding of all your products and customers, and how your customers use your

products and services. It's an additional win for your program if your sponsor understands your organization's competitive landscape and where there may be challenges and opportunities particularly from a labour, productivity and culture perspective.

4. Gets the Big Picture

The strongest executive sponsor candidate should be a team leader who has basic familiarity with diversity, equity and inclusion, as well as insights into your partners, vendors, suppliers and the communities in which you operate. Your executive sponsor should also understand the organization's human resource objectives in general, as well as how DE&I can support them.

5. Is Fluent in Two Languages—Business and Business Culture

Your executive sponsor should be fluent in two languages—the language of your business (i.e. organizational goals and objectives) and the language of your organization's business culture. By being fluent in both, your sponsor can help communicate the value of DE&I to senior leadership and key stakeholders and can also play an important role in emphasizing how critical and integral DE&I is to how your organization does business.

6. Has Capacity/Resources

This attribute is absolutely critical. Even if you find an executive sponsor who successfully does all the things mentioned above, you should ensure the sponsor also has the capacity to take on the business of championing diversity, equity and inclusion. This sponsor should understand how to include DE&I value-adds and messaging in organizational strategy—not just when you need something, but throughout organizational decisions that determine the potential success of your business over time.

Leadership Buy-In

Once your executive sponsor is in place, it is time to engage the entire senior leadership team in a broader discussion on diversity, equity and inclusion, with the objective of gaining buy-in across the group, ideally with a commitment to accountability for DE&I objectives and ultimately, when it is created, the strategy itself.

One proven method of engaging senior leadership teams in this type of discussion is collectively conducting an Intercultural Development Inventory® (IDI) assessment, and then discussing the results. The IDI assesses intercultural competence—the capability to shift cultural perspective and appropriately adapt behavior to cultural differences and commonalities. Intercultural competence has been identified as a critical capability in a number of studies focusing on effectiveness of business adaptation and job performance, student adjustment, transfer of technology and information, and inter-ethnic relations within nations.

Having leadership participate in the IDI and then collectively discussing the results (on a team basis) gives your organization a baseline assessment of your strengths and opportunities for intercultural competence. Additionally, it helps to garner buy-in since each leader has one-on-one coaching to learn about their strengths and opportunities. The IDI sets the foundation for leadership buy-in on a personal level.

With that achieved, it is time to set realistic DE&I goals for the size of your company, collectively.

What It Could Look Like

AWARENESS	ACTION	LEADERSHIP
• DE&I Statement developed and announced to company • One executive leadership member leading DE&I	• Development of a DE&I Strategy and Action Plan • Multiple executives championing DE&I	• All executive leadership championing DE&I • Partnering with the industry on DE&I initiatives

Step 2: Define your strategy and action plan (which includes a roadmap for how you are going to get to your end goal)

With senior leadership support, goals identified, and an executive sponsor in place, now is the time to create a DE&I strategy for your company/organization.

It is absolutely critical to success that you don't develop this strategy alone. Even if you are the lone person in your organization who is ultimately responsible for building and implementing this plan, seek input from others within your company. This way you broaden support and make other people stakeholders in the collective success of the strategy.

There are multiple ways to get others involved:

1. **Establish a committee/point person or point people.** Gather your diversity champions and strike a committee (or council) specifically for developing your diversity, equity and inclusion strategy. Ask each person to take one section of the strategy development. Set a timeline for completion of different sections and completion of the entire strategy.

2. **Establish mechanisms to seek input.** Don't create your strategy in a bubble. Seek input, feedback or advice from different people in the organization, from a range of departments, functions or lines of business.

3. **Don't focus only on supporters.** Seek input from both supporters and potential detractors of diversity, equity and inclusion. It may seem counterintuitive or discouraging to seek input from detractors, but if you identify ahead of time what their objections may be, you can incorporate approaches to mitigate barriers or roadblocks that your diversity and inclusion efforts may encounter.

Undertake a mapping of your current status quo and future opportunities from a diversity, equity and inclusion perspective, as well as a broader organizational-culture perspective.

A common and effective way of doing this is to conduct a SWOT (strengths, weaknesses, opportunities and threats) analysis in conjunction with your senior leadership team. Specifically, as you build out your SWOT you should answer the following questions:

1. What are our strengths within DE&I that we should continue to focus on (internal focus)?

2. What are gaps, areas of concern, or barriers that are in your control to fix (internal focus)?

3. What are things in our external environment that would be great for us to focus on within DE&I (external focus)?

4. What are some of the external risks and barriers we need to be aware of and prepared for that may affect our strategy (external focus)?

What It Looks Like (for example only)

Strengths (internal)	Weaknesses (internal)
- Highly engaged staff - Supportive senior leadership - Dedicated internal resource to focus on DE&I - Diverse perspectives and experiences that are a competitive advantage - Strong organizational culture	- White male leadership team - Pay equity issues (females making less than males) - Inconsistent or no metrics - Lack of established DE&I policies - Some departmental resistance - Retention issues - Decline (or not increasing) employee engagement - Lack of physiological safety - Lack of creativity, new ideas and innovation

Opportunities (external)	Threats (external)
- Partnerships with associations - Available industry best practices - Additional untapped labour pools - Learning from the experiences from abroad	- Declining talent pool - Negative public relations risks

Once the SWOT analysis has been completed, undertake a discussion of your future vision for DE&I – your end state or where you are going. Working with your leadership team, try to understand the long-term vision for DE&I within your company by trying to answer the following questions.

- What would success look like initially?
- What does this look like in the medium term?

Now it is time to create your strategy and action plan. Depending on your organization's maturity with DE&I, or the organization's readiness to accept cultural change and the resources available, these strategies and action plans may vary greatly. It may be that you choose to adopt a phased approach to enable your organization to hit certain benchmarks (i.e. engagement and awareness) prior to moving to a more advanced stage of action and implementation. Or you may choose to adopt a more comprehensive approach.

To create your strategy and action plan, pull in the details from the SWOT analysis as well as the discussions about the company's vision for DE&I into a document that outlines the long-term, medium term, and short term focus for DE&I. This will form the action plan (or roadmap) for achieving your larger, long-term goal(s).

What It Looks Like

AWARENESS	ACTION	LEADERSHIP
• Create a SWOT analysis with a few key people • Have an initial focus on awareness and education to broaden support within your company	• Have a diverse range of individuals create a SWOT analysis • Move beyond awareness-building into a few basic policies to address low-hanging fruit	• Have a third party assist with an analysis • Look at various types of analyses, some of which can be more complex than a SWOT analysis • Build out a comprehensive multi-year strategy and action plan that addresses several aspects of your business at one time

The following are resources that may be of assistance as you develop your strategy and action plan.

- Recent research on team and organizational diversity: SWOT analysis and implications (Journal of Management)
- SWOT analysis: What, when and how
- Inclusiveness and Diversity Action Plan
- Equity, Diversity and Inclusion Roadmap
- Planning for Diversity, Equity and Inclusion
- Diversity and Inclusion Plan
- IDI Assessments

Step 3. Review your mission, vision and values to see if they align with your DE&I strategy and action plan

Successful organizations ensure that their goals and objectives are always in synergy with their vision, mission and values, and consider this as the basis for all strategic planning and decision-making.

By developing clear and meaningful mission and vision statements, organizations can powerfully communicate their intentions and inspire people within and outside the organization to ensure that they understand the objectives of the organization, and align their expectations and goals toward a common sense of purpose. This is why it is essential to ensure alignment between your organization's mission, vision and values and your DE&I strategy. And at appropriate times in the development of your DE&I strategy, you should revisit and adjust your vision, mission and values appropriately.

While this is positioned as Step 3 within this playbook, it doesn't necessarily need to reside in this spot from a chronological point, but rather it is something you should be cognizant of throughout the process and revisited after the process is completed.

If your company doesn't have a vision/mission statement, then it is possible to solely establish them for your DE&I efforts and then come back to integrate them into a broader company vision/mission should you choose to develop them.

What if you or your company doesn't have a vision, mission and values? Here are a few basic instructions on how to develop them:

1. How to establish your vision

A vision statement is a future-oriented declaration of the organization's purpose and aspirations. It lays out the organization's purpose for being and provides a clear vision that helps in aligning everyone towards the same objective, providing a basis for goal congruence.

When you create your vision statement it should be:

- Concise and high level
- Forward-looking
- Avoid jargon.
- Indicate who it covers and impacts (stakeholders, employees, clients/service users, community, government, shareholders, etc.).
- Include strategic goals and priorities.
- Capture the essence of your organization.
- Resonate with everyone in the organization.

2. How to create your mission

An organizational mission is a statement specifying the kind of business it seeks to undertake. It puts forward the vision of management based on internal and external environments, capabilities and the nature of customers of the organization.

A mission statement should:

- Communicate the organization's reason for being.
- Reveal a company's philosophy, as well as its purpose.
- Specify how it aims to serve its key stakeholders.
- Define the current and future business in terms of product, markets, customer, etc.
- Is often longer than vision statements and sometimes also includes a summation of the firm's values.

When you are crafting your mission statement, examine what you want to do and how you will get there. Here are some suggestions around the purpose of a diversity, equity and inclusion strategy that could be incorporated into your mission statement.

- Increase social image, heighten reputation in the community.
- Improve productivity and achieve business goals through increased engagement.
- Represent the community you serve in order to attract and retain top talent.
- Foster innovation and creativity through encouraging diversity of thought.

3. Review your mission, vision and values regularly.

Finally, the mission and vision should be reviewed regularly to determine if they are still relevant. Questions you should ask yourself when reviewing them include:

- How has it been received?
- How often is it looked at by others? (Not only those of you who wrote it!)
- Is it outdated?
- Do the mission/vision and the strategy still support each other?
- Do your diversity mission/vision statements still support the overall organizational mission and vision?
- Do your diversity mission/vision statements generate broader discussion about diversity and inclusion within the organization?
- Do your diversity mission/vision statements generate discussion about the validity of the company mission?

What It Looks Like

AWARENESS	ACTION	LEADERSHIP
• Can be concise and high level • Look at other organizations for guidelines and examples	• Can be tied to business goals and strategies • Gather input from diverse composition of organization	• Leading the industry • Touches every part of the business whereby all aspects of the business are seen through a DE&I lens • Holding one another accountable for our actions

Helpful Resources

- Mission and vision statements
- How to write a mission statement
- How to write a vision statement

4. How to determine your values

Every organization has a set of values. Sometimes they are written down and sometimes not. Written values help an organization define its culture and belief. Organizations that believe and pledge to a common set of values are united while dealing with issues, both internal and external.

- Values reflect what is important to the organization and its members.
- Values are intrinsic—they come from leaders inside of the company.
- Values are not necessarily dependent on the type of company or industry and may vary widely, even among organizations that do similar types of work.

The values statement or guiding principles for your diversity and inclusion strategy are your enduring, core beliefs. They're guiding precepts that never change and are part of your strategic foundation. Again, use the language that is most appropriate in your organization when choosing the title for this particular section of your diversity and inclusion strategy document.

You should include two to five values statements or guiding principles; this is not meant to be a long exhaustive list that will cover every possibility.

Examples:

- The culture of diversity and inclusion goes deep in the organization and is more than a numbers game.
- Inclusiveness is everyone's responsibility.
- Show linkages to legislative requirements and/or organizational codes of conduct.
- Aligned with organizational values, and culture, values of stakeholders.
- Include components of respect, inclusion, equity.
- Identify what the values mean (with examples).

Again, like many other parts of the strategy, these statements or principles should be re-evaluated as needed with input from all levels.

Helpful Resources

- Develop your value statements for your strategic framework
- 4 easy steps to writing your value statements
- Make your values mean something

For more resources visit the DE&I section of BILD's website.

Step 4. DE&I Communications

Now that you have done the above work, you need to share this information with your company. Let them know the progress you have made and what they can expect next.

Effective communication of your company's DE&I strategy and action plan is crucial to obtaining employee support and buy-in, which in turn will impact the success and speed of your implementation.

Ideas for Effective Employee Communications:

Effective organizations, regardless of size, prioritize employee communications. They know that their success hinges on an engaged workforce that shares its vision and is aligned with its goals. Employees become engaged when they understand the company's fundamental principles and share in its mission, vision and values.

Here are some tips for effective employee communications.

1. Be clear and concise.
Overwriting and using technical jargon will lead to confusion and misunderstanding. Keep it simple and clearly outline expectations.

2. Set the tone at the top.
CEOs and senior leaders need to set the tone. These individuals should be visible and accessible; there needs to be an understanding that there is a correlation between strategic employee communication and the achievement of organizational goals.

3. Understand your employees.
You may need to communicate differently with different audiences. Consider surveying your employee base regularly and ask if they're getting the information they need.

4. Use many channels.
Most people need to hear or see a message multiple times, in multiple ways, to understand it completely. Distribute your messages electronically, in writing, face-to-face, and at meetings. But be sure that your message is consistent across all these channels.

5. Notify employees first.
When you prioritize your communications, always think of your internal people first. No surprises. Your employees shouldn't be blindsided by hearing it from others first, they should hear it from the organization first.

6. Match actions with words.
Do what you say you're going to do. Otherwise, you undermine your credibility and employees are less likely to believe or take future communications seriously.

7. Emphasize face-to-face communication.
Although today's employees may be more tech-savvy than ever, nothing beats human interaction. Most employees want to hear news and information from their supervisors. Train managers on how to communicate and provide the necessary tools needed to succeed.

If managers are expected to help explain and support complex concepts, you may need to provide the talking points and resources (such as handouts).

8. Train/educate often.
It is imperative for a company to continuously train their employees, and this is true of diversity, equity and inclusion as much as other organizational priorities. For DE&I, depending on your organizational maturity, you may wish to start with basic awareness-raising and employee discussion groups, before moving on to other, more complicated training.

9. Communicate regularly.
Be systematic and strategic. Create an editorial calendar with regular dates for communicating with your employees, whether it is by newsletter, email, or a scheduled meeting.

10. Measure effectiveness.
Set objectives and assess whether you have met them. Ask employees if the organization has communicated its strategy well.

11. Facilitate conversation.
One-way communication is a thing of the past. Employees who feel heard have enhanced feelings of trust.

There are many ways to facilitate two-way communication, including face-to-face meetings, interactive video interviews, employee surveys, Q&A features on the company intranet and suggestion boxes.

Employees significantly influence the outcome of any project. If you communicate strategically and with purpose, you are more likely to see all your employees working with a common purpose, toward shared organizational goals. Effective employee communication keeps employees engaged and eager to contribute to the company's success.

Inclusive Communications

When considering internal or employee communications, language and style choice are as important as the 'when' and 'how.' This is true not only for communications regarding diversity, equity and inclusion, but for all employee communications. An organization's efforts in DE&I can easily be undermined in the eyes of employees by poorly conceived or executed communications on the most mundane of employee or internal communication topics.

Therefore, as outlined by Sarah Cordivano in her article Inclusive Communication: Three Principles, "inclusive communication is an important part of making an inclusive work environment." Inclusive communications are grounded in three principles:

Principle 1: Empathy

Those practicing internal communications are reminded that diversity, equity and inclusion is not a checklist, but a continuous exercise in empathy. It is about connecting with your audience with an awareness of how your language and communication choices interact with their experiences to impact how they absorb your message.

Principle 2: Culture

Communication is only one part of organizational culture. Find additional ways to work with your employees to build and enhance company culture. A common way to do this is to provide a voice for specific communities within your communications (for example the LGTBQ+ community), as they know their community better than anyone. Ask for their experiences, listen, and take them to heart. Consider a program that features their stories and experiences in official communications. This empowers them, gives them visibility and gives more authenticity to your communication.

Principle 3: Empowerment

Provide tools for inclusion and showcase role model behavior. Leaders are role models, whether they want to be or not, whether they are good role models or not—they become role models as everyone looks up to them. They need your support, including coaching and guidance to be experts in communication. They set the bar for the rest of the company, so empowering them goes a long way for your organization.

Also consider providing resources, such as inclusive language guides and books for everyone in your organization so that people can build their own skills and awareness. It is essential to meet people where they are and give them the tools they will need to grow.

This empowers them to take ownership in creating an inclusive work environment.

Build Your Communication Plan

Now it is time to build your communication plan. Below are some basic steps to build an internal communication plan for DE&I, assuming that your company already has an internal communication function and capability.

Step 1: Measure & assess

Understanding where your employees are in terms of DE&I awareness, knowledge and support will significantly shape your plan and approach. If you do not already have a solid baseline, you can use approaches such as an employee focus group or informal surveys in an effort to gather that understanding.

Step 2: Define goals and objectives

The next step to creating your plan is to **analyze your communication goals** in order to define your objectives and build out your approach.

One of the most effective and simple ways is to use the SMART approach:

1. **SPECIFIC** – What are the company's DE&I goals? Where is the company in achieving those goals? Who works towards achieving them? How can the business reach its objectives?

2. **MEASURE** – Why do the goals exist? How can they be measured? (i.e employee support, engagement, etc.)

3. **ACHIEVE** – Are the goals attainable? Are they realistic and does your organization have the capacity?

4. **RELEVANT** – Will the goals affect the overall business of the company?

5. **TIME** – What are the timescales to reach each goal?

When you are mapping out these goals and objectives, always consider your employees and how they fit within them and support them.

Step 3. Identify the target audience

Is the audience the entire company, or are you targeting subsets of the workforce for roll-out or other practical consideration? It is vital to understand who your target audience is as it will drive how you shape your message and narrative, and what tools/mechanisms you use to communicate.

Step 4: Create the right message:

Different target groups need different styles of message. But one thing is relevant to all groups. Internal communication should be:

- Clear
- Informative
- Engaging
- Inspiring
- And, as per the above, inclusive in language and message

The tone should be right for the group it is addressing. Always keep a professional tone, but at the same time, it should also be humane, social and empathic. It is important to draft your messaging appropriately for the topic and your audience. You can always look for outside assistance to ensure your content will land with your audience in the right way. Some examples of different internal communications formats include:

Top-Down Communication - when management presents overall company strategies by internal news article, newsletter or email.
Bottom-Up Communications - the opportunity for all staff, regardless of their position, to give their opinions through surveys, community posts, polls and group chats.
Peer-to-Peer Communications - interaction between colleagues, which promotes teamwork, often through professional or social groups.
Information Communications - such as company policies, product information, handbooks and manuals, annual reports, which may be required by everyone in the company or specific department.
Culture Communication - utilized to reward and recognize employees, to inform of events, offer training, and share social information.

As you consider your target audience, you should also consider your communication format and message mix to tailor your communications appropriately.

Step 5: Select the appropriate mix of communication vehicles and channels

Different topics and messages will naturally lend themselves to different ways of communicating. There are a myriad of ways to deliver internal and DE&I messages, from company town halls to workshops and training, newsletters, intranet and other specialized tools (Microsoft 365, Google workplace, Slack etc). It is crucial to recognize that people take information onboard in different ways and that they must be exposed to messaging multiple times using a mix of vehicles and channels to deliver your message. These choices can be worked into your calendar and adjusted based on measurement and feedback.

Step 6: Providing engaging communication

When trying to compete for an employee's share of time or engagement, nothing is a bigger barrier than dry, boring content. Successful internal communications should be interesting and enjoyable to read (or attractive to the eye, if watched) and motivating. It's all about communicating with employees and stimulating them. All communications should engage and be encouraging.

Step 7: Establish a communication schedule

Establish a communication schedule that provides employees with a regular cadence, doesn't overwhelm them and proceeds through the issues and topics to allow you to achieve the goals and objectives you have established.

Step 8: Measure and adjust

Regularly measure the impact and effectiveness of your communications, using the metrics from Step 1 and those defined in Step 2. Fine-tune and adjust as necessary.

Establish Your DE&I Committee (Council or Advisory Group)

A diversity, equity and inclusion committee is a task force of diverse staff members who are responsible for helping bring about the cultural, and possibly ethical, changes necessary for your business.

The purpose of the committee is to meet regularly in order to help guide a company's DE&I initiatives. The committee is typically tasked with the following:

- Promoting training and events to bring awareness to DE&I in the workplace.
- Engaging co-workers in DE&I conversations and training.
- Reviewing and developing policies and procedures that will promote workplace DE&I.
- Acting as DE&I champions.

In addition, the DE&I Committee serves as a place for non-committee members to provide suggestions and challenges for the DE&I initiative to address.

Regardless of the size of your company or where you are on your journey, it is important that your DE&I Committee has:

- A designated point person (or committee of people) on staff to go to about DE&I related items
  - Who do employees share ideas, questions or concerns with?
  - Who is the company point person/champion/voice for DE&I?
- Your point person, committee, council or advisory group must have a direct line to leadership and the project sponsor (in smaller companies, the project sponsor may also be the 'committee').
- There needs to be a level of decision-making authority as it relates to DE&I or, at a minimum, a direct line to the decision-making authority.

What It Looks Like

AWARENESS	ACTION	LEADERSHIP
• 1 - 2 people who are champions for DE&I • Dedicated staff or side of desk	• Working group of 2 - 5 champions for DE&I • Moving toward dedicated staff	• Larger team made up of representation across the company who have decision- making ability and influence • Committee should be comprised of strategic leaders with decision-making ability • Dedicated staff

Once your committee is populated, it is now time to establish the governance, mandate and charter for the committee. This includes identifying a chair and secretary, scope and boundaries of decision-making authority, reporting mechanisms and priorities.

This will vary greatly from company to company. Fortunately, the Canadian Centre for Diversity and Inclusion has a comprehensive guide that can be accessed in the helpful resources below:

Helpful Resources

- [Diversity and Inclusion council](#)
- [What is a diversity council and how do you make it successful?](#)

Now it is time to communicate...

The establishment of your DE&I committee (or advisory group) provides a perfect opportunity to reinforce your objectives with the organization, introduce the committee members to their peers and outline any initial priorities established by the committee. It also serves as an opportunity to foster a two-way dialogue between employees and committee members.

Approaches that you may wish to consider:

- A town hall, lunch-and-learn or webinar for staff—hosted by the chair of the committee—that outlines the company's DE&I objectives, introduces the committee and how it will be working, as well as its priorities. Consider providing committee members an opportunity to directly introduce themselves to employees and outline why DE&I is important to them. Engage employees in a two-way dialogue and advise them on how they can interact and contribute to the committee.

- Produce an internal communication video that introduces the committee, its functions and members, and provide a mechanism for employees to interact with the committee and contribute ideas.

- Produce a series of articles or content for the company newsletter that introduces the committee and its mandate. Committee members could take turns providing different content that introduces them as people and why they are passionate about DE&I, and that focuses on different elements of the DE&I plan.

Data Collection

Overview

It will be important to collect data to determine the need for change and what barriers your employees may be facing. We spoke about the broad SWOT analysis above as a first step. To dive deeper, you can gather information through surveys and by looking at historical violence and harassment complaints and trends.

AWARENESS	ACTION	LEADERSHIP
• Look at the data you have and what other organizations are doing • Research community needs and concerns around diversity	• In-house-run survey with DEI questions along with demographics • Compare demographics with external area	• Data organizations are collecting to facilitate change • Survey opinions on systemic leadership • Data is shared at a high level • Base goals on employee feedback • Communicate systemic barriers surveyed to leadership

Data collection and analysis to determine the need for change/dive deeper on barriers (known and possibly unknown).

Overview:

Data collection helps you to establish a baseline for where you are currently and where you are going. It also enables you to identify things that may not have been evident initially. Equally importantly, it can enable you to collect ad hoc information on people's experiences that you can feed into your planning and programming.

When you are first starting off, you may have to rely on data and information that you have readily available. This can be information and feedback from employee surveys, pulse surveys, informally collected information, such as employee suggestions or data that you already have about employees in their HR files, either on paper or electronically (i.e. HRIS).

When collecting any employee data, especially information that has the potential to be as sensitive as data related to DE&I, it is vital to:

- **Strive to make employee participation voluntary.**
- **Advise clearly why the information is being collected, how it will be used, and that it will remain confidential and only shared in aggregate form.**
- **Collect data in accordance with any regulatory requirement or consistent with company policy.**
- **Take any and all steps to protect the confidentiality of employee data consistent with regulatory requirements and/or company policies.**

1. Prior to commencing any data collection, ensure you have the basics in place. The questions below will help guide your considerations and plan ahead for any data collection exercise.

    a. Will you be collecting the data yourself or use a third party?
    b. Ensure you are aware of the legalities of what you can and cannot ask; what can be voluntary.
    c. Carefully consider the language you use when obtaining this information.
    d. How will you ensure it is confidential?
    e. How will the information be used?
    f. How will the information be stored? Who will have access to it?
    g. How will you report on this data? Aggregated? To what degree? Who will have access to these top-level results?

2. Be completely transparent about why you are collecting the data. Information gathered should be used to benchmark performance, inform your strategies and plans, and help you tailor your plans and actions for maximum impact. Below are a few ideas and concepts to consider and help guide your thinking.

    a. One purpose of collecting further data on your organization is to determine what your workforce looks like relative to your local labour market.
    b. Your data should give you insight into systemic barriers and historic barriers (captured or not captured in your SWOT, next level down):
        - Tangible barriers you may know of – recruitment process, promotion process, policies and procedures (or lack thereof);
        - Criteria for advancement/promotions (see Appendix B).
    c. Your data needs to include both subjective and objective information (focus groups add insight to survey data).
    d. The results of your data need to be used effectively and leadership must be kept informed and aware.
    e. Once data is reviewed, underrepresented areas can be identified.
    f. Your data should give you insight into where to look for the why (barriers and opportunities).

    g. The purpose isn't merely to compile information about your demographics, but the

reason why they are the way they are. For example, metrics, such as demographic representation and counting the number of ethnic groups, gender, abilities, sexual orientation, etc., should be expanded to include:

- What does retention look like for underrepresented groups? (Review the numbers and reasons for voluntary and involuntary departures, as well.)
- What does the promotion rate (and bonuses) look like?
- What does compensation look like among groups?
- Are employee engagement survey results disaggregated to recognize responses by underrepresented individuals (race, gender, abilities, etc.) as well as those who opt not to self-identify? Being satisfied with outcomes that reflect the majority of responses will leave you ignoring clear and telling trends from your underrepresented populations.

h. Data collection on violence, harassment and discrimination should be tracked and shared with leadership. Awareness by leaders should be elevated as opposed to having the old-school "containment" approach where reports are "contained" within only the human resources and/or legal departments. The context of these allegations will result in organization-wide learning, clarity on the ongoing state of your culture, and perhaps will be used as case studies to develop the skills of your people managers. (Be mindful of trends of reports and allegations that consistently derive from specific departments or leaders.)

3. How to collect the required information:

a. Surveys done through self-identification. Please note that in Canada, this type of information gathering can only be done on a voluntary participation basis. In order to maximize participation, transparently and proactively disclose why you are gathering this information.
b. Data, such as age, sex, race and sexual orientation are some of the areas you can survey.
c. Look at demographics by location, department and position.
d. Look at turnover and retention rates.
e. Look at male versus female.
f. Collect using third-party confidential systems.
g. Collect using focus groups or pulse surveys.

Helpful Resources

- Diversity and inclusion metrics in the workplace
- SurveyMonkey for pre-built and custom surveys
- Culture Amp for all employee-related surveys
- IDI Assessments

Create Your Project Plan

While your DE&I strategy and initiative will be a long-term endeavour, it will likely be made up of phases that cover off short-term objectives and longer-term strategic objectives (with shorter-term often evolving to longer-term.) Having a clear and defined project plan that covers off these objectives, timing, resources required and responsibilities is key to making measurable progress over time.

With your strategy and committee in place, now is the time to develop your project plan.

What It Looks Like

AWARENESS	ACTION	LEADERSHIP
• Create a plan to become more aware; education – who will be attending, what forms, how often etc. • What resources are available?	• Create a multi-year plan that ensures long-term goals are met.	• Create plans for the organization • Fold in an impact to the industry • Ask all group leaders to create a DE&I plan for their groups to tie into overall organizational goals • Link DE&I goals to performance

1. Short-term goals/priorities/initiatives

Short-term goals articulate exactly what needs to be done to achieve the long-term strategic objectives. Short-term goals set specific, measurable performance targets that generally can be achieved within one to two years. Some organizations choose to indicate goals year-by-year. For example, if your diversity and inclusion strategy spans five years, and your long-term objectives indicate what you would like to have accomplished at the end of those five years, then this short-term goals section might lay out specific priorities or initiatives for years one, two, three and so on.

For setting short-term goals, we suggest you use the widely respected SMART goals framework. SMART goals should be specific, measurable, achievable or agreed-upon, realistic and time-bound (see link at end of this section).

Examples of some short-term goals:

- Communicate the diversity and inclusion mission/vision and strategy internally and externally.
- Implement new measures to establish baseline, gather current state information.
- Define sponsors/champions.
- Establish a diversity and inclusion council led by the CEO or a member of the C-suite, with representation from all divisions/departments and/or lines of business.
- Create a 'diversity and inclusion lens' framework with which to re-evaluate existing policies and procedures, and to ensure that new policies and procedures incorporate diversity and inclusion considerations.
- Develop a branding and marketing strategy around diversity and inclusion.
- Establish a working committee(s) to focus on specific areas of diversity and inclusion.
- Develop partnerships with (specific) outside organizations that support diversity and inclusion.
- Cultural competency training for all levels.
- Incorporate diversity and inclusion measures into performance reviews of leaders and people managers.

Helpful Resources

- SMART Goals
- Goal-setting guide

2. Long-term strategic objectives

At this point in your strategy document, you are starting to delineate what you want to achieve and how you will get there.

As the name suggests, long-term strategic objectives should be high-level objectives that will take several years to achieve — generally at least three years. Some organizations choose to set goals that may take five or even 10 years to achieve.

Long-term strategic objectives answer the big-picture question of what you must focus on to achieve your vision. They should articulate a position to be attained or an accomplishment rather than how you are going to get to that point.

Again, we recommend that you align your goal-planning with the type of goal-planning and strategy development that already happens in your organization. If it is common in your workplace to state long-term objectives as five-year goals, then align to your organization's style so that your document will have more validity.

Caution: we recommend that you avoid idealistic or unrealistic long-term objectives. If they are not realistic or attainable, you are going to have difficulty gaining buy-in for your strategy. Of course, we all share the long-term objective of creating inclusive workplaces. But is it realistic to have a long-term objective such as "Transform our organization into an inclusive workplace?" Is that attainable within five or 10 years? And how will you measure success? Keep in mind, some employers have been on their diversity journey for over 20 years and are still struggling with inclusion issues.

Purdue University's Goals and Objectives Toolkit (taken from Strategic Business Planning for Commercial Producers) provides two excellent frameworks for long-term versus short-term goals. They suggest that long-term goals drive you toward your vision.

DRIVE stands for Directional, Reasonable, Inspiring, Visible and Eventual:

- **Directional:** moves the organization toward the general intention of the vision statement.
- **Reasonable:** practical and obtainable, not extreme or unrealistic.
- **Inspiring:** provide management challenges and positive motivation.
- **Visible:** the goal is easy to visualize.
- **Eventual:** will be fulfilled at a future date.

A good formula for how to articulate long-term objectives is: to have (or to become) X (the result) by year.

- Align to your vision and business strategy.
- Focus on a limited number of priorities.
- Engage all levels of the organization with input from all stakeholders.
- Review and revise periodically.
- Share and engage across the organization to foster buy-in and encourage integration in daily activities.

Examples of some long-term goals:

Here are some examples of the potential wording of long-term strategic objectives for organizational diversity and inclusion strategies:

- 10 years – Become industry leader on influencing diversity and inclusion best practices.
- Five years – Outperform diversity and inclusion industry benchmarks across dimensions (LGBT, women in the workplace, visible minorities, Indigenous peoples, people with disabilities, accessibility, etc.).
- Diversity and Inclusion Leadership Council is accountable for driving and supporting diversity and inclusion initiatives.
- Organization's overall strategic objectives/vision/mission includes diversity and inclusion.
- Since diversity and inclusion is a strategic imperative, appropriate budget and resources are allocated to operationalizing the diversity and inclusion strategy.
- Develop organizational culture focused on inclusion through education and communications, using change management and culture change approaches.
- Programs will be in place to attract, retain and support diverse groups.
- Establish mentoring and sponsorship programs.
- Attract and retain a workforce that reflects the communities we serve.
- Increase employee engagement by X per cent.
- Increase retention – decrease voluntary turnover by X per cent.
- Increase representation of (specific underrepresented groups) at X level(s) of the organization

by X per cent.
- Establish accountability measures for all leaders and people managers within three years and for all employees within five years.
- Implicit/unconscious bias training to be completed by employees at all levels.
- Create strong community partnerships with (specific community organizations).
- Create a completely barrier-free and accessible environment for all external and internal stakeholders (employees, customers/clients/service users/patients/ students).
- Establish a central repository of information on diversity and inclusion with easy access for employees.
- Report publicly on our approach to diversity and inclusion through our public website, annual reports, CSR/Sustainability reports (if applicable), etc.
- Reduction in external/internal complaints by X (specific measure of complaints).

Implementation

The action items section of your diversity and inclusion strategy should contain specific statements about how the short-term goals will be accomplished with an indication of the resources required, who is responsible, and specific deadlines for each action item.

What It Looks Like

AWARENESS	ACTION	LEADERSHIP
• Look at business practices and policies that may be contributing to lack of diversity – intake forms and gender, employee referral program, company culture i.e. golfing, drinking after work, etc.	• Staff training – unconscious bias, inclusive leadership, being an ally, recruitment, on demand training (CCDI), Indigenous awareness training, diversity speakers • Tools for training; how to intervene, what to say • Champions for DE&I	• Highest level of leadership must initiate conversations on DE&I topics. • Budget – separate DE&I budget instead of getting looped into People and Culture or HR • If we simply implement and operationalize this, it becomes rules and compliance-driven. If we link it to our leaders' and employees' stories, there is more motivation to do things differently and show up differently – this is a more people-centric way of thinking.

The below can serve as a checklist to help guide the implementation of your initiative.

1. **Facilitate a strategic discussion with sponsor(s):**
   - Develop a communication plan.
   - Develop a maturity assessment model/tool.
   - Meet with the sponsor to define role and expectations and validate the diversity and inclusion strategy.

2. **Education and awareness:**
   - Basic communications or training for all employees to answer "What is diversity and inclusion?" and "Why does diversity and inclusion matter?"
   - Embed diversity and inclusion into communications – intranet, email blasts, town hall meetings, leaders' communications, newsletters, etc.

3. **Training and development to support your objectives:**
   - Diversity and Inclusion 101.
   - Unconscious-bias training.
   - Sign language for customer-facing employees.
   - Cultural competence training.
   - Embed diversity and inclusion or cultural-competence content into all major training currently offered (i.e. manager training, leadership training, customer-service training, etc.).

4. **Establish and launch a diversity and inclusion council:**
   - Establish accountabilities and guidelines for council.
   - Establish a list of potential members.
   - Ask the sponsor(s) to invite potential members to be part of the council.

5. **Sub-committees:**
   - Establish diversity and inclusion committee or council sub-committees focused on specific strategies, goals, functions or lines of business.
   - Establish who will be on sub-committees, how often they will meet, what they will be accountable for, and by when.
   - Identify tools and resources (needed vs. have).

6. **Develop resource guides for appropriate topics, including:**
   - Accessibility
   - Recruiting
   - Hiring and onboarding
   - Inclusive language guidelines

7. **Review or develop policy and procedures, including:**
   - Benefits
   - HR policies and procedures
   - Accommodation

8. **Talent management strategy:**
   - Establish specific goals for recruitment from underrepresented groups.
   - Review recruitment/interview processes for potential exclusion/barriers.
   - Provide cultural-competence training to recruiters and hiring managers.
   - Provide accessibility training to recruiters and hiring managers.
   - Review performance appraisal process.
   - Review job descriptions through an inclusion lens.

***Optional (depending on company size and sophistication from a DE&I perspective)

9. **Launch Employee Resource Groups (ERGs) where appropriate:**
   - Employee Resource Groups (or ERGs) are employee identity- or experience-based groups that build community. ERGs are sometimes known as Affinity Groups or Diversity Groups.
   - Establish a framework for how ERGs will run in your organization with guidelines, approval mechanisms, budgets, etc.
   - Develop communication plan for rollout of ERGs.

10. **Develop a community engagement approach, where or if required:**
    - Community engagement is based on the democratic idea that everyone who is affected by an issue that impacts their community should have a say in the decision making around it. Moreover, it holds the promise that public participation can influence decisions that affect the provision of services, future visions and sustainability of our communities.

Although there is no commonly agreed-on definition of community engagement and the use of the term varies widely (sharing in notions of consultation, participation, collaboration and empowerment), community engagement captures its meaning in mutual decision-making. People, governments and organizations work collaboratively to create and realize sustainable visions for their community's future.

Continual Evaluation or Audit

A key theme of this guide is the need to set measurement criteria for your DE&I programs and initiatives and then continually revisit them to measure progress, or lack thereof, and adjust.

This section provides guidance on what that can look like and provides some examples of metrics that can be used to measure progress. It is recommended that your organization identify a subset that works for your focus and that these metrics be revisited annually or on a more frequent basis.

What It Looks Like

AWARENESS	ACTION	LEADERSHIP
• Tracking activity of existing actions • Pulse or employee surveys that exist • Discussion outcomes and general feedback • "Watercooler chat" or employee buzz	• Measure outcomes, determine what is and what is not working • Review and adjust – set periodic review of plan • Survey employees on feedback • Champions for DE&I • Evaluation and continuing audit of the plan	• Data organizations are collecting to facilitate change • Look at external focused measures (below) • Focus groups • Exit interviews with questions specific to DE&I • Candidate demographics

1. **Examples of internally focused measures:**
   • Employee demographics (gathered through self-identification survey)
   • Hiring rates vs. objectives per group
   • Recruitment, retention, advancement, attrition scorecard by demographic
   • Employee engagement by demographic (and specific inclusion questions analyzed by demographic)
   • Tracking of diversity and inclusion training for managers and employees
   • Impact of diversity and inclusion training on attitude and behaviour change
   • Measures of cultural competence for leaders and/or employees

2. **Examples of externally focused measures:**
   • Demographics of customers/clients/service users/patients/students
   • Churn or retention rates of customers/clients/service users/patients/students by demographic
   • Customers/clients/service users/patients/students' satisfaction or engagement by
   • demographic

3. **Candidate demographics:**
   • Media exposure and social media mentions related to diversity and inclusion
   • Community surveys (most effective with ability to analyze by demographic)
   • Partnerships with community organizations
   • ROI of marketing to specific demographic segments
   • Percentage of spend with diverse vendors

- [What gets measured gets done: measuring the ROI of diversity and inclusion](#)
- [Global Diversity and Inclusion Benchmarks](#)

Summary and Conclusions

Overview

DE&I is a journey not a race. It is important to take the time to get it right or you will risk employee confidence in your efforts and the management of the organization. This playbook is simply one way of looking at how to implement DE&I effectively, but ultimately the best resource is experience. We encourage those looking at implementing or advancing their programs to participate in BILD's DE&I educational forums and share groups as an additional resource.

Ultimately, critical success factors and dependencies may vary by organization. However, one of the biggest dependencies for any major initiative is ensuring enough resources are allocated for successful execution.

Some of the major critical success factors are:
- Leadership buy-in of business case and strategy.
- Diversity and inclusion must become embedded in business/organizational strategies, not just an 'HR thing.'
- Appropriate funds and human resources dedicated to rollout and ongoing management.
- Cascade strategy throughout the organization with accountability for the silent middle; tie to individual goals.
- Process for review and readjustment.
- Flexibility to foresee or respond to trends in real time.
- Communications as part of a broader change management plan with clear understanding of 'why.'

Helpful resources

[Understanding project and task dependency](#)
[Critical success factors: identifying what really matters for success](#)

APPENDIX A

Career Development

APPENDIX A - Career Development

The development and progression of employees within the organization should be a core part of your strategy. In order to ensure a fair and transparent process, this templated Career Building Guide provides a clear framework for employees to use when developing their career profile. It is meant to be shared with their manager to help navigate the career conversation. It provides a fair and consistent process for all employees to work with their managers on defining their career goals and receiving coaching, mentoring and training to support their readiness to progress.

Steps for Completing the Career Planning Process

1. Request a career planning discussion at any time with your manager.
2. Assess your characteristics, preferences, values, limitations, goals, strengths and gaps, and provide your assessment to your manager before sitting down to have a conversation with them. This allows them to prepare for the conversation and come prepared to have a productive conversation with you.
3. Meet with your manager and walk them through your self-assessment and career goals.
4. Your manager will build upon, add to and/or refine the self-assessment to ensure developmental needs are clear. Your goals will remain unchanged.
5. Your manager will indicate your level of readiness to progress from your current role (the time required for you to fully master the job as it is defined today).
6. Based on the goals and the developmental needs, identify the specific competencies/skills/ experience that are required to help you progress toward your goals.
7. Brainstorm possible approaches to acquiring these competencies/skills/experience. If you or your manager are not sure, involve your human resources department (or another leader who may be able to support this step).
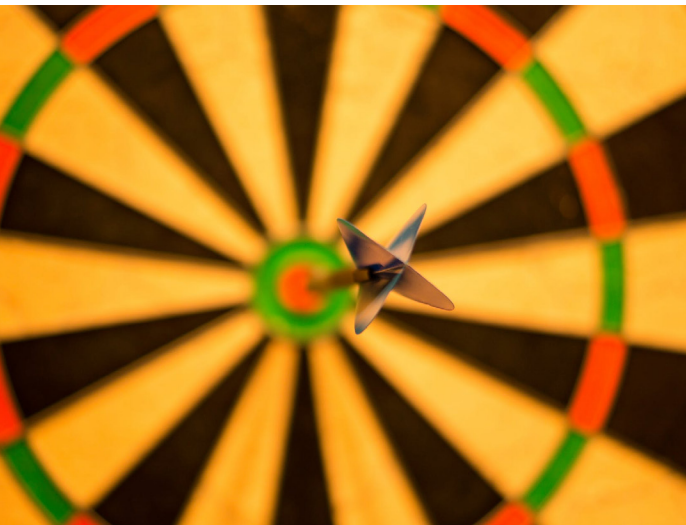
Building Your Career Profile

Setting Career Goals. Once you have completed your Career Profile, it is time to consider what roles, or, to put it more broadly, what work best suits you. When setting your goals, it is important to consider all your options. Keep in mind, you are setting out an ideal vision for how you would like your career to unfold. Avoid the tendency to water this down by telling yourself it is not possible because of this reason or that. At this stage, it is important to be honest about what you want from your career.

Identifying Strengths and Gaps. When you examine the goals you have set out for yourself, consider what strengths and experience you possess today that will support your endeavour to achieve these goals.

How do your characteristics, values and preferences align with the requirements of the roles or the work set out in your goals?

Next, identify the gaps that would have to be addressed for you to be ready to achieve your goals. Gaps may be in your level of experience, exposure to certain skills, aspects of the work, knowledge or training related, or in the demonstration of behavioural competencies to be successful.
To help identify gaps, consider those in the role today, what do they do effectively that you (at this time) cannot or are still developing the ability to do.

What Are My Preferences? Each of us, based on our characteristics, values and personal situation, have preferences in terms of our work environment and the type of work we most want to engage in. These preferences may be about flexibility, opportunity for autonomy or teaching/helping others.

What Are My Limitations? We all have them. No matter how competent we are, each of us has areas where it takes more effort for us to do that type of work or be involved in a situation. Often our limitations are directly opposite to our unique abilities.

What Are My Key Characteristics? Everyone has characteristics and personality traits that make them unique. These shape their personality or personal style. Knowing your style preferences will help you to choose career goals where you can realize your potential. Some examples of personality assessments include: Myers-Briggs Type Indicator, Jung Typology and Striving Styles.

What Are My Values? Identifying and comprehending what is important to you about work will help you to choose an occupation and a work environment that matches your values. Are you most concerned with earning enough money to pay your bills or advancing your skills and experience? In reality, you are probably working for a number of reasons and it is good to identify those reasons, understand their importance and confirm the career values that are most important to you.

Source: Framework provided by Caliber Leadership Systems

Helpful Resources

- Caliber Leadership Systems
- Striving Styles Personality Assessment
- Myers-Briggs Type Indicator

APPENDIX B
Promotions

APPENDIX B - Promotions

Managing promotions effectively is one of the most powerful ways leaders can drive their company's success. When people believe promotions are managed effectively, they are more than twice as likely to give extra effort at work and to plan a long-term future with their company. They are also five times as likely to believe their leaders act with integrity—a key underpinning of high-trust, high-performing companies.

This guideline for employees and managers supports the fair and equitable advancement and promotion of employees within your company. Investing in your employees and rewarding those who perform well is essential to business growth as well as the retention of your talent.

For the purpose of this guide, a promotion is a move to a position of a higher rank, responsibility and salary.

1. Establish a talent review committee
A talent review committee is typically made up of a cross-section of senior leadership as well as your human resources representatives. The purpose is to provide multiple levels of insight and review on recommended promotions. This helps to maintain a fair, consistent and objective process with regard to promotions. It also fosters collaboration on how the organization is growing talent within the company as well as tracking and managing substandard performance.

Promotions should not be determined in isolation, and accountability is a key component of the talent review process. Your committee will help ensure accountability among leadership to maintain a consistent and bias-free (to the greatest extent possible) promotion process.

2. Develop criteria for promotion
Developing clear criteria for advancement allows your committee to focus on being objective and rational rather than relying on subjective opinions and beliefs. Below are some examples of objective criteria:

- Demonstrated experience and skills (counting experience both within and outside the company)
- High-performance level in recent performance review cycles
- Skills and expertise that match the minimum requirements for the new role
- Increased scope in the new role
- Increased complexity in the next role
- Increased level of autonomy and/or authority within next role

3. Reflect on possible biases
When managers are recommending employees for promotion they need to be aware of the biases (like recency or halo effect) that can affect their decisions regarding promotions. Additionally, to help address unconscious biases that may be present in the promotion process, it is recommended to use a talent review committee.

4. Follow these helpful processes:
- When possible, career opportunities should be posted internally for employees to apply for.
- Assess whether a particular underrepresented group has missed out on promotions.
- Use as much objective criteria as possible: experience, education (or equivalent experience), training, certifications (or equivalent experience), demonstrated abilities, skills and knowledge.
- Use a ranking system for eligible employees.
- Use a talent review committee.
- Reflect—conduct a post-talent-review analysis.
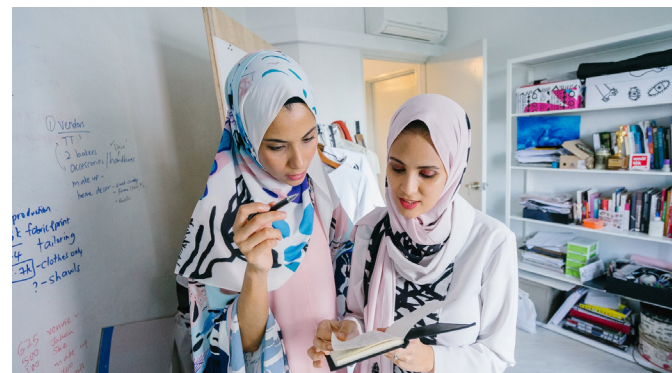
5. Transparency

Once you have your promotion process and criteria defined, don't keep them a secret. Be as transparent as possible in your criteria for advancement within the company. To be transparent, it is imperative that you couple it with a fair and equitable career development and performance review process.

Helpful Resources

Employee Promotion Policy Template
5 steps toward bias-blind promotions
How you promote people can make or break a company culture
Caliber Leadership Systems

APPENDIX C
Job Title Criteria Template

APPENDIX C - Job Title Criteria Template

Job titles can be a sensitive topic for employees. For some, they may symbolize work status, personal accomplishment, credibility, tenure, etc. However, job or role titling within an organization should be approached in a systematic and consistent manner, regardless of personal value a specific title may hold for an employee. Titles assigned should be consistent not only within a department, but across departments in an organization as well. To facilitate the determination of appropriate titles for roles within the organization, it is important to understand that a title needs to reflect the role being performed as defined through the description (e.g., purpose, key duties and responsibilities, scope and authority) and not something that is given or withheld based on an individual incumbent in the role.

The below is a template that you can use to define the role title and criteria to support it.

Non-Management Role Title Criteria

Level	Title	Description	Examples
Professional	Coordinator	Responsible for coordinating functional processes requiring professional knowledge or training. Processes are defined and may be repetitive in nature.	[List examples in your company]

Management & Leadership Role Title Criteria

Role Title	Definition	Strategy & Execution	Reporting Structure	Level of Autonomy
Function Manager	Responsible for managing a process or discipline within a function; however, without any direct people-leadership responsibilities.	Executes specific tasks, processes and/or workflows.	Not responsible for direct reports.	Limited scope of responsibility over interpretation of functional plans.

Source: Framework Provided by Caliber Leadership Systems

Helpful Resources

• Caliber Leadership Systems

APPENDIX D
Recruitment

APPENDIX D - Recruitment

Resources and tips for recruitment

- Does the hiring process comply with legal obligations with respect to the *Ontario Human Rights Code*, AODA, Employment Standards and the Charter of Rights and Freedoms?
- Are openings advertised in various areas that serve equity-seeking groups?
- What efforts are you making to reach out to equity-seeking groups?
- Do your hiring forms related to 'gender' include an option for those who do not identify as male or female?
- Does your organization monitor the diversity of the applicant pool?
- Do the people interviewing have training on DE&I and unconscious bias?
- Are the individual interviewers diverse?
- Do the individuals trained in recruitment know about accommodations under the AODA?
- Is there a fair selection procedure?
- Is foreign work experience and education recognized?
- Are unbiased questions being asked?
- Are you implementing 'blind recruitment' during the hiring process?

APPENDIX E
Out-of-the-Box Courses

APPENDIX E - Out-of-the-Box Courses

- [Respect in the Workplace](#) – Out-of-the-box solution for legislative training requirements on OHSA Workplace Violence and Harassment
- [Bay Ryley Learning](#) - Out-of-the-box solution for legislative training requirements and diversity, equity and inclusion