



DIVERSITY, EQUITY, AND
INCLUSION

TOOLKIT

THE TOOLS YOU NEED TO TAKE YOUR DE&I PLAN FROM IDEA TO
EXECUTION

Your DE&I toolkit



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Corporate diversity and inclusion is a neat and tidy package for an unwieldy and complex web of challenges and opportunities.

In fact the term DE&I (Diversity, Equity, & Inclusion) is so loosely defined that it has come to include anything even peripherally related to the diversity cause, making many of us question – has the term lost all meaning?

Yet in the past year DE&I initiatives have returned with a much-needed vengeance. Questions of racial justice, unconscious bias, and political strife have taken over the national conversation – and the workplace is not immune. And so with the world sufficiently upended, this is the ideal moment to reimagine how we can best integrate our businesses into a changing society – both from a moral standpoint and a broader strategic perspective.

Step I: What's your goal?


You can't expect to solve every challenge - at least not right away.

Rather than spread yourself too thin, focus on establishing 3-4 objectives that help you answer (some of) the following questions:

- Is the program in response to a specific issue?
- Do we want to influence our external community, or focus our efforts internally?
- Do we want to increase one type of diversity in particular?
- If the program is successful, how will our company look in 6 months, 1 year, 3 years?
- Why should my team care about this program? How will it effect their lives and work?

Essentially you want to pin down what drove you to start a DE&I program in the first place. What are the pain points at your company, and where can you make the most impact?

By the end of this brainstorm session - preferably conducted with a few passionate DE&I advocates on your team - you should be able to clearly explain what "progress" looks like to you and your company.



Great - you now know *where* you want to go, but *how* do you get there? Consider the toolkit your guide: it gives you strategic insight, organizational know-how, and concrete examples to take your DE&I program from vague idea through its first 3 months of execution.

But before you tackle organizing your program and engaging your people, it's important to take a step back and consider what has to happen to achieve your goals:

Buy-in from all levels of the company

This is one of those situations where neither top-down nor bottom-up leadership will suffice. Everyone must be invested in the success of your DE&I program, or else you risk causing a rift in your company.

Purposeful organization

Once you get started, you'll likely be overwhelmed by the amount of stuff that needs to be done. Focus on 1-2 topics to begin and organize your time strategically - especially since this is not your (nor most of your staff's) full-time job.

Continuous action and reaction

This is not a one-and-done project. Growth, learning, and adaptation must be on-going for the program to survive. This also means you don't need to rush; this project will grow and change as your business matures.

Once everyone is on the same page, you can move on to establishing your DE&I baseline.

Step II: establish a baseline

Opinions, thoughts, fears - these are all valid and useful, yet they shouldn't directly inform your diversity strategy.

Before you start mobilizing your team, you should understand the current state of DE&I at your company. The best way to do this is to rely solely on *facts*. Put aside your preconceptions and let the data do the talking.

In the following section we'll explore two methods of data tracking - a DE&I survey and an internal audit.

Conduct an internal DE&I survey

With the help of survey experts, we've compiled a comprehensive 'State of DE&I Survey' that covers everything from microaggressions and boundary setting to wellness and mental health. In combination with an internal audit of your current metrics (see next page), the survey will help set a baseline against which you can compare future improvement.

You can download the survey [here](#) and either use it as-is or modify it to suit your company's needs.

Conducting the survey



Schedule a time in your employees' calendars to take the survey, but give them 3-4 days in case they cannot complete it at that time. Emphasize the importance of providing truthful responses. Remind your people that all responses are anonymous.

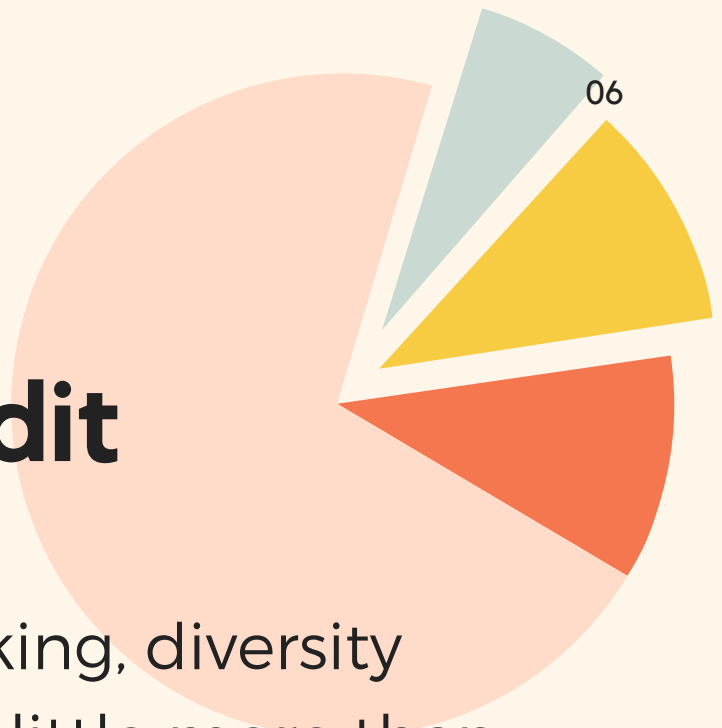


Engage an external, impartial person (survey expert or otherwise) to review and collate the data.



Review the anonymous responses as a company to create a single, shared understanding of the status quo.

Run an internal audit



Without data tracking, diversity commitments are little more than words on a page. Corporate fancy-speak to impress the LinkedIn audience and the shareholders with little substance and even less staying-power.

Now when we say data, we're not talking quotas. What we're talking about is being conscientious of *how* people find your company brand, *where* and *why* people fall off during the hiring process, and *whether or not* your data points to some unknown bias in the system. Importantly, these are also the areas where you have the greatest opportunity to *drive* progress, not just track it.

We've found it helpful to keep an eye on the following (sometimes overlooked) metrics to get an accurate sense of our DE&I baseline and the impact of our continued efforts. Don't worry if you don't have all the numbers right now - you can start tracking going forward.

What to track (before hiring)



INFORMATION ABOUT YOUR CANDIDATES' PARENTS OR GUARDIANS

The person you see in an interview - the software engineer, the accountant, the marketing manager - is the result of a long line of decisions, experiences, and lifestyle adjustments. They are the product of their nature and nurture, and no picture would be complete without better understanding what made them who they are.

That's why we think it's important to not just ask about a candidate's education - and to make an effort to include diverse academic backgrounds - but to ask about their parent or guardian's highest level of education. This information contextualizes the socio-economic background of your candidates and helps to nail down a more slippery piece of diversity data than say, race or gender.



INFORMATION ABOUT YOUR CANDIDATES' BACKGROUND

Okay, so this one isn't so unusual. It's pretty normal for larger companies to ask about a candidate's ethnic background during the initial application process. Nothing too invasive, just a simple "if you're comfortable, please select how you identify" and a drop down menu.

The unusual bit comes down to how you use this biographical information. Counter to popular belief, we don't recommend using this information to determine your hiring decisions - instead, use it to help keep a pulse on the types of people your job posts attract and alert you to possible gaps in your outreach. It's a roadmap to how you might diversify your hiring process, outreach efforts, and job postings going forward.

What to track (after hiring)

3

RETENTION RATES FOR DIFFERENT MINORITY GROUPS

If you're gathering background data during the interview process, you should already have all the information you need to track differing retention rates. As people leave your team, your division, your company - follow up with HR or whoever owns your metrics and make sure their departure is logged with respect to their biographical data and reason for leaving.

At the end of the year you should have a better understanding of which groups are feeling included and which are at risk of disengagement.

4

EMPLOYEE HAPPINESS

While not technically a DE&I metric, happiness is strongly correlated with feelings of inclusion and fulfillment. The happier your people, the more comfortable they tend to feel in your culture and the more likely they are to recommend your organization to their (hopefully diverse, if you've hired well) network.

Instead of an annual Employee Wellness Survey, consider weekly or monthly one-question surveys via email. They take 10 seconds to complete, elicit unfiltered responses, and are surprisingly fun. You can either ask the same question every week - ex: "I feel happy and fulfilled in my job" - or change it up to keep people on their toes. We're not affiliated with any of these survey management tools, but based on their capabilities and reviews they might be a good fit for your company and culture:

- TinyPulse
- Officevibe
- Culture Amp
- 15Five

What to track (at the company level)



FOLLOW THE MONEY

This one might be a little uncomfortable, but bear with us. How a company allocates its resources tells a story of what it prioritizes. If a company partners with ethical vendors, gives back to diverse organizations, and sets up programs whereby workers volunteer once a month at a local X Y or Z, then the money says “this company is making DE&I real.” If, on the other hand, the company spends money without any view to DE&I - an innocent oversight for those of us who haven't considered this metric before - the money says “DE&I is not a priority.” So what does your money say?

For the longest time our money said something along the lines of “I don't know.” We gave back to diverse organizations and supported our community, but we didn't do so on a consistent basis and we didn't audit our spending with a DE&I lens. If you're in a similar boat - there's no shame in it. This is an opportunity to be more intentional about your spending, if that's something your company wants to do.

With buy-in from top executives, you can encourage your company to audit how it selects vendors by asking

- What restaurants are my company's go-to when ordering lunch?
- What vendor do we use to print business cards?
- Who is in charge of these decisions, and what requirements do they use to make the best choice?



Step III: prioritize and focus

With your internal audit complete and your survey answers in hand, you're now ready to select 3-4 areas where you can make the biggest impact - be it hiring, retention, community organization, company spending, or whatever else. These groups will become the foundation upon which your entire strategy rests.

We know it's difficult to get started from scratch, so we've provided some example focus areas (all of which we've used ourselves) to help get you off on the right foot:

Focus area inspiration

FOCUS I: INTERNAL & EXTERNAL PRACTICES AND POLICIES

Before we turn our eyes outward upon the world, we thought it important to consider our own way of doing things. The purpose of this group is to evaluate our current approach to **resolving workplace issues, hiring, and setting boundaries** to ensure that we are always operating in accordance with our own values.

Primary goal: Overhauling our hiring practices to promote DE&I and revisiting our employee handbook

FOCUS II: METRICS

Hard to measure progress without metrics, wouldn't you say? That's why we collected a group of our most data-driven employees to help us understand the state of DE&I within our company and **devise strategies to better track these numbers going forward.**

Primary goal: Benchmarking our data and tracking DE&I statistics

FOCUS III: EDUCATION & TRAINING

The main aim of this group is to **create space for internal growth** (team bonding activities; lunch and learns; assets; surveys; etc.),

Primary goal: Planning internal trainings ("team building activities"), creating an internal DE&I survey to pinpoint areas of growth,

FOCUS IV: COMMUNICATION & COMMUNITY SUPPORT

We discovered that the same educational materials we use internally can be offered as resources to our network. In partnership with the 'Education & Training' group, this group **devises and disseminates programs, tips, and best practices with the broader community.**

Primary goal: Partnering with community organizations and offering educational resources to the public

FOCUS V: BUSINESS PARTNERSHIPS

Lastly, this group is dedicated to **building relationships and partnerships within our business community to advance the cause of DE&I.**

Specifically, this group looks to learn from our partners, to help expand our DE&I efforts, and to surface potential areas for collaboration.

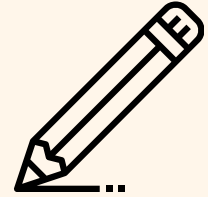
Primary goal: Taking a critical look at our vendors/where we spend our money and creating a collection of minority-owned businesses to better support such partnerships

These are just a few ideas - you could potentially create tens of focus areas depending on the results of your survey, your internal audit, the size of your company, and your goals.

Once you've decided where you want to devote your energy, we suggest creating different "working groups," each assigned to one area of focus. Ideally these groups will meet weekly to strategize and implement your DE&I plans. Bringing all the groups together every few weeks is a great opportunity to share progress and offer feedback.

Next, we're sharing a helpful checklist our "internal hiring" group developed:

STEP V: Diversity hiring checklist



Hiring for diversity has always been a challenge; you want to increase the diversity of your team, but not at the expense of other priorities. Luckily these aren't competing needs!

By asking yourself these questions throughout the interview process, you can identify talented people who add a much-needed perspective to your group:

- How does this person *add* something we don't currently have? (Different training, schooling, tenure, life experience, personality, upbringing, demeanor, etc.)

- In what ways are they similar to our current people?

- How often am I likely to disagree with this person?

- Who in my company/team reminds me of this person?

- Is this person a referral, an applicant, or someone we found sourcing?

- How will this person disrupt, question, or grow our culture?

- What are my reasons for potentially *not* hiring them?

- Do the reasons above impact their ability to do their job?

In this case, what you're looking for is *difference* and *dissent*. The more we reevaluate our beliefs, the better our team and company will withstand future challenges.

DE&I program calendar

When we started our DE&I program, we were flying in the dark. We would try one thing, let it go on for much too long, revise a month later, and start all over. The cadence of events, development of initiatives, and collection of resources was completely disorganized. We tried to do everything at once and it ended up slowing down our process significantly.

We want you to learn from our mistakes. After months of experimentation, we've developed the kind of calendar we *wish* we'd had at the beginning.

PHASE 1

Objective: Create working groups and establish broad goals. Schedule weekly meetings.

Theme: Strategize

Week 1:

- **Welcome email** inviting everyone at your company to join a DE&I working group
 - **Google Sheet to sign up** for a given working group (see working group examples on p.3)
 - **Schedule initial meetings** for the following week
-

Week 2:

- **First meeting with entire DE&I club.** Outline vision - why, how, challenges - with focus on *integrating* DE&I into existing systems
 - **Send out internal DE&I survey** (see p. 4) to entire company
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Week 3:

- **Lunch & learn** hosted by member of DE&I club. Ex: 'Zoom cook-along,' Hispanic Heritage Month trivia, voting rights workshop, etc.
 - Third-party professional receives and reviews survey results
-

Week 4:

- **Review anonymous survey results as a company** in group setting - this promotes transparency and ensures everyone is starting from the same understanding
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PHASE 2

Objective: Create working groups and establish broad goals, begin weekly meetings.

Theme: Learn

Week 5:

- **First meeting of working groups!** Based on survey results, each group should *outline customized 3-month commitments* as well as action items for the next week
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Week 6:

- **Weekly working group check-in:** depending on the group, brainstorm challenges and opportunities and divide up initial tasks
 - **Second meeting with entire DE&I club.** Share working group goals and offer feedback across groups
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Week 7:

- **Weekly working group check-in:** share updates
 - **Second lunch & learn**
 - **Establish (DE&I) weekly Book Club** - choose initial book/TED Talks and send out calendar invite
-

Week 8:

- **Weekly working group check-in:** prepare to implement ideas
 - **Third meeting with entire DE&I club:** confirm group implementation plans for Month 3
 - **First Book Club**
-

PHASE 3

Objective: Set the wheels in motion and recalibrate as needed

Theme: Implement + Integrate

Week 9:

- **Weekly working group check-in:** first initiatives go into effect
- **Book Club**

Week 10:

- **Weekly working group check-in**
- **Meeting with entire DE&I club:** discuss format and content for internal monthly newsletter of events, upcoming cultural holidays, features, etc.
- **Book Club**

Week 11:

- **Weekly working group check-ins**
- **Lunch & learn** hosted by member of DE&I club
- **Book Club**

Week 12:

- **Weekly working group check-ins**
 - **Meeting with entire DE&I club:** cross-group discussion of implementation challenges/feedback
 - **Send out monthly internal newsletter**
 - **Book Club**
-

Takeaways

You are a company of unique people - not of group affiliations.

Promoting diversity can sometimes fall into a nasty trap - that of reducing people to their skin color or sexuality or gender.

One way we've avoided this misstep is by creating a "Spotlight" series, wherein one employee is regularly featured during an hour-long lunch & learn/roundtable interview. So far we've learned about the history and priorities of a handful of our people - including our Ukrainian-immigrant Accountant and Jewish-Iranian Business Development Manager.

This approach has worked for us but you might find something else is more appropriate for your team and company. The key is in emphasizing that which makes us *all* unique. By highlighting the unique experience of every individual person - not just those who check certain diversity boxes - your program can be enjoyed and championed by all.

Here are three more takeaways you might want to keep in mind as you build and apply your own DE&I framework:

Three things we learned the hard way...

Skip the DE&I lingo/title

The more times you mention 'diversity,' the less you'll keep peoples' attention. That's why we suggest using words like "team building exercises" and "book club" rather than "sensitivity training" and "diversity readings." A DE&I program works best when it's not a standalone venture, but is instead integrated into the company's culture.

It's okay to finish your projects

Yes, there's always more to do - but sometimes you just need to let an initiative run its course. Take the 'internal hiring policies' group for example - once you've reviewed and improved all your policies, take a step back and let the changes take effect. Every few months you can recalibrate if need-be, but don't keep meeting weekly to discuss a problem that you've already solved (for now, at least).

Make fun the focus

Diversity is about celebrating difference, trying new things, learning about cultures, and getting to know your co-workers. Of course this is a serious process, but that doesn't mean it has to be devoid of fun.

No one will be successful if they rely solely on dry research and uninspired trainings. So order themed meals, play trivia games, and host cook-alongs.

What's next?

Moving beyond diversity and embracing belonging

A pure "diversity" program is destined to exist outside the normal workplace culture. Until you can integrate it into the heart of your company - and include *every single person in its success* - it'll likely continue as a satellite project that, ironically, is by definition exclusive.

Now imagine you adopt "belonging" as your North Star instead. This is a concept with which every person - regardless of gender, race, sexuality, ability, etc. - can identify. We all want to feel like we belong on our team, at our workplace, in our lives. We want to know that we play an important part in whatever we do, that we make a significant difference at work and beyond. We want to know that our co-workers would care if we left.

Belonging is a unifying experience. It doesn't seek to separate us into smaller and smaller groups, but to include every person in a shared vision of reality. And that's why at some point, after you've established systems and are driving progress, diversity programs benefit from being folded into a larger goal of belonging. Every person has a role to play in making work fun, inclusive, challenging, productive, and meaningful. The sooner you celebrate that fact, the more of a positive impact you'll make on your company.

Additional resources

Thank you for joining us on this adventure! If you're looking for more resources, we're happy to put you in touch with DE&I consultants, lawyers, additional information, or anything else you might need.

Contact: hello@provenrecruiting.com