

EDI Leading Practices

A GUIDE FOR COMPANIES



With Support From

Vancity

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Rachel Dekker, Mahroo Shahbaz, and Stephanie Bertels. *EDI Leading Practices: A Guide for Companies*. (Embedding Project, 2024). DOI: 10.6084/m9.figshare.25229981

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INTRODUCTION

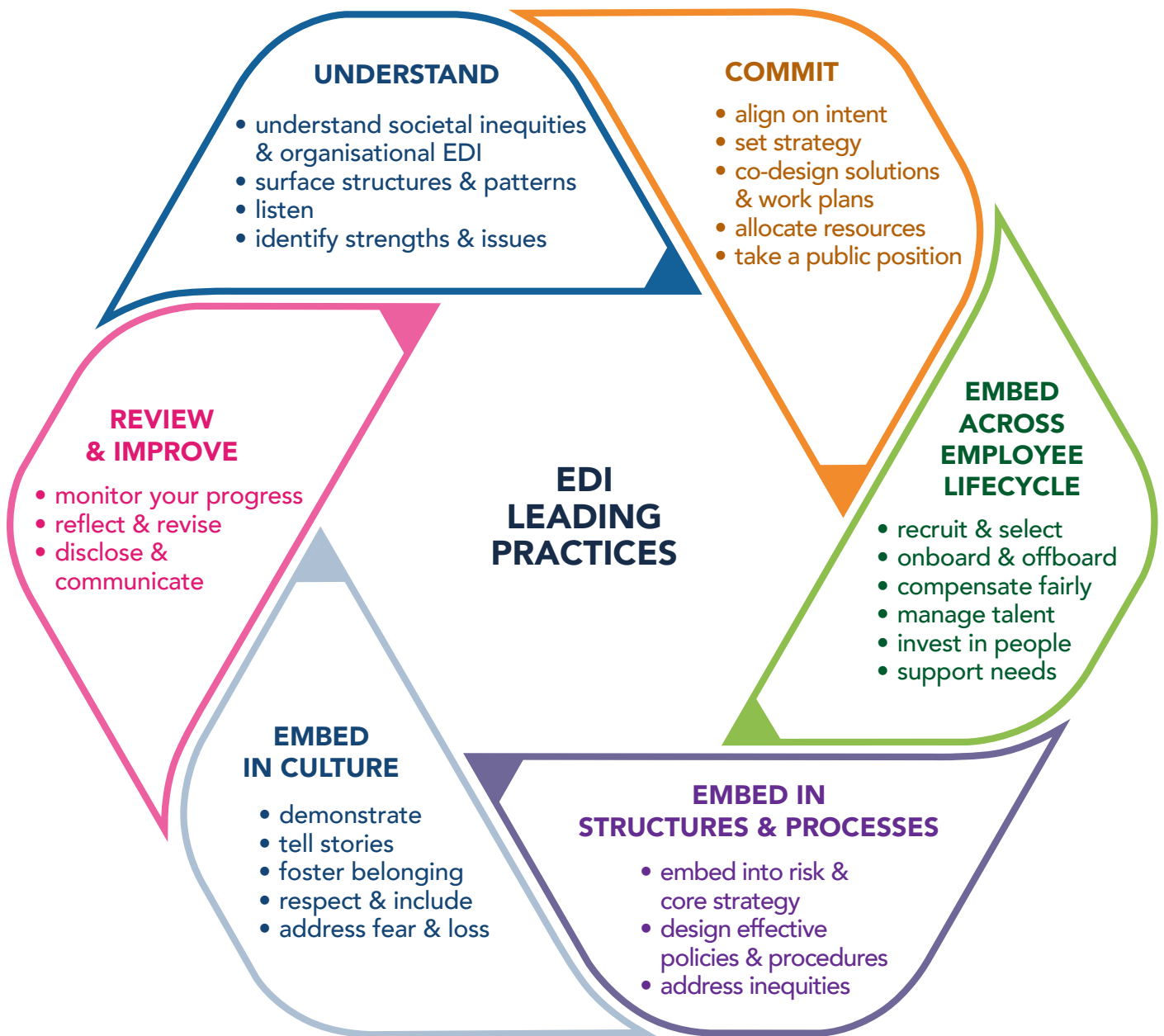
A growing number of companies are interested in understanding how to effectively support workplace equity, diversity, and inclusion (EDI). Workplace EDI is a rapidly evolving space. Many organisations began with a focus on diversity, but quickly recognised the need for culture change efforts to foster inclusion (D&I or I&D) and address challenges with retention and wellbeing that are common to diverse but non-inclusive workplaces. Over time, it became clear that strategic investments focused on shifting processes and structures would be necessary to address barriers to workplace equity, shifting the focus to EDI or DEI. More recently, as organisations grow their understanding of the impacts of workplace culture, they are expanding their focus again to address issues of justice (JEDI), access or ability (IDEA), belonging (DEIB), reconciliation (DEIR), or other relevant combinations of these concepts.

Aligned with this growing interest, several of the Embedding Project's peer network members wanted to better understand the practical steps that others were taking to support more equitable, diverse, and inclusive workplaces where their workforce feels welcome, that they belong, and that they are treated fairly. To respond to this need, we consulted the research and guidance on equity, diversity, and inclusion

(EDI) practices; consulted with companies in a range of industries and geographies to seek their input on how to implement an effective EDI program; worked to identify case studies; and identified resources that may be helpful in supporting implementation.

This guide offers a summary of our findings with a focus on the actions that organisations can take to improve EDI in their own workplaces. While our focus is internal, rather than addressing EDI in the value chain or in community engagement and consultation efforts, some of the practices outlined here may also help to support that work.

We found that organisations that appear to be making more progress on EDI are typically engaging in longer-term company-wide cultural change journeys that require broad leadership support, new capabilities, a receptive environment, and frequent stock-taking and course-correction. That's why this guide is structured as an iterative and (somewhat) cyclical portfolio of practices, that starts with cultivating the foundational knowledge your company will need in order to start its EDI journey. We encourage you to explore the EDI process and enter the practices wherever it makes the most sense for your organisation based on your efforts to date.



EDI Leading Practices.  Embedding Project.

1

UNDERSTAND

[1.1 Understand Societal Inequities and Organisational EDI](#)[1.2 Surface Structures and Patterns](#)[1.3 Listen](#)[1.4 Identify Strengths and Issues](#)

1.1 Understand Societal Inequities and Organisational EDI

DESCRIPTION

Creating an equitable, diverse, and inclusive work environment requires that your company first understands what societal structures and inequities exist outside the organisation, that could replicate or extend themselves within your company. Systemic and structural inequities are often complex and deeply rooted and can undermine your company's EDI efforts, if their prevalence and power are poorly understood. Those leading the work must also ensure they understand regulatory requirements, your company's formal commitments, and leading practice expectations on your company.

The following actions can help your company to understand to ensure your company understands EDI and what's expected of your organisation:

- *Understand the socio-economic and cultural context.*
- *Understand historical inequities and how their legacies may persist.*
- *Understand the core concepts of EDI.*
- *Understand what is expected of your organisation.*

UNDERSTAND THE SOCIO-ECONOMIC AND CULTURAL CONTEXT.

The socio-economic and cultural context of your organisation can have an impact on whether and how inequity manifests itself inside your organisation. To gain cues about possible issues to look out for in your organisation, identify dominant groups and learn about structural inequities and socio-cultural beliefs and practices in the communities, region, or country your company operates in. Consider consulting demographic data, research, and reports for insights on discrimination,

marginalisation, or gender, racial, class, or other types of inequity. Your company can also commission or conduct research or interviews or consult local knowledge holders. Sources of inequity often intersect, as do sources of privilege: identify what patterns of power and inequity exist in your context. Consider how socio-economic and cultural differences can affect certain groups' ability to access opportunities to work or their employee experience, including at your company.

EXAMPLE: Gender Diversity at Tata Steel

[Tata Steel's](#) initiative to enhance gender diversity focuses on addressing root causes that systemically restrict the ability of different gender groups to meaningfully engage within the manufacturing sector. The company identified that cultural and social barriers, such as stereo-types and the lack of support structures for women and transgender individuals in their region, were key factors that limited inclusion and participation. Understanding the persisting impacts of historic marginalisation, the initiative used these insights to develop a range of efforts to support workers in ways that worked to dismantle these harmful legacies and enable better access to opportunities across the organisation.

UNDERSTAND HISTORICAL INEQUITIES AND HOW THEIR LEGACIES MAY PERSIST.

Historical injustice, oppression, and inequity can often have lasting repercussions for and ongoing impacts on affected groups and their descendants or successors. And often current challenges cannot be understood without their historical context. Consult historical research, reports, or social studies and engage with knowledge holders or organisations that represent affected groups. This can help your organisation to better understand these historical injustices, the structures and systems that created and uphold them, and their legacies in society and the workplace. Your company may need to grapple with possible complicity in creating or perpetuating these inequities, which is an important step on your organisation's EDI journey.

Addressing Inequities

Simply understanding what inequities exist in your organisation is not sufficient. The practice [Address Inequities](#) covers how your company can explore and address historical wrongs.

EXAMPLE: Suncor's Journey to Reconciliation

[Suncor's Journey to Reconciliation](#) is the company's purposeful approach to fostering Indigenous participation within the organisation. The initiative builds on the insights from the company's intentional efforts to learn and understand from Indigenous stakeholders the ongoing inequities that shape Indigenous experiences so that Suncor can better support meaningful relationships with Indigenous Peoples, as community members and as Suncor employees and contractors.

UNDERSTAND THE CORE CONCEPTS OF EDI.

Ensure your company and those leading or engaged in the EDI work in your organisation are adequately equipped with EDI skills, knowledge, and competencies to effectively lead the work. This may involve training on foundational concepts of equity, diversity, and inclusion, belonging, justice, access, and reconciliation, as well as privilege, allyship, psychological safety, unconscious bias, microaggression, and other concepts that may be relevant to your organisation. It is important to help participants see the interconnections and how these concepts interrelate.

EXAMPLE: Dr. Martens' DE&I Learning Program

Dr. Martens offers a [DE&I Learning Programme](#) for leaders in their HR team that provides a thorough understanding on bias and inclusive language and behaviours to foster a better understanding of EDI topics within recruitment and talent management teams at the company.

EXAMPLE: Learning EDI Concepts at Fidelity

Fidelity offers a variety of [training and eLearning tools and opportunities](#) for understanding core concepts within EDI. The company requires eLearning for new associates to maintain consistent knowledge on accessibility and small group sessions for leaders to learn and practice concepts such as allyship and inclusive leadership.

UNDERSTAND WHAT IS EXPECTED OF YOUR ORGANISATION.

To develop an effective approach to EDI, your company needs to ensure it understands what is expected of the organisation. This understanding offers an indispensable foundation for your company's efforts to align on the intent of its EDI ambitions. Review formal expectations including relevant laws and regulations to be able to ensure your organisation's compliance. Inventory the public commitments your company has made, including in its external communications and through its memberships in industry or other initiatives. Identify leading practice guidance for companies or performance standards on EDI to learn what constitutes EDI leading practice and what standards and frameworks exist to help your organisation improve its EDI performance and benchmark its ambitions. It can be helpful to scan these expectations annually, as they continue to evolve.

EXAMPLE: Zurich Insurance's Commitments to Diversity, Equity, Inclusion, and Belonging (DEIB)

[Zurich Insurance](#) is a signatory to global DEIB initiatives, including the UN Women Empowerment Principles, UN Global Compact LGBTQ+ Initiative, The Valuable 500 initiative, and the d&i Leaders Club. The company uses the Global Diversity, Equity, and Inclusion Benchmarks as a guiding source for its efforts. As a multinational company, Zurich has also proactively sought out localised partnerships and initiatives to advance DEIB commitments in its various countries of operation, such as the Charta der Vielfalt in Germany, the Race at Work charter in the UK, and the Canadian Centre for Diversity and Inclusion.

1.1 Understand Societal Inequities and Organisational EDI

The Global Diversity, Equity, and Inclusion Benchmarks (GDEIB) [↗](#)

These Diversity, Equity and Inclusion benchmarks propose result-focused standards to support your organisations strategy for managing towards inclusivity and comprehensive EDI development.

What is Diversity, Equity, and Inclusion? [↗](#)

This article defines EDI and contextualises key areas of focus for different demographics that can be important to consider when designing your EDI journey.

Wheel of Privilege and Power [↗](#)

This tool offers an understanding and identifying of how different facets of our identities can relate to patterns of privilege and power in our societies.

Racism Defined [↗](#)

This resource defines racism and its various facets as they exist within our societies. It offers a baseline to begin understanding key concepts that are central within EDI work.

Setting the Context: Understanding Race, Racism and Racial Discrimination [↗](#)

This article by the Ontario Human Rights Commission explores the historical and continued context of racism that frames our societies today, providing a broader understanding of the inequities that persist.

Social Identities and Systems of Oppression [↗](#)

This article discusses the intersections between social identity and systemic power structures built on historical injustices that reinforce oppression and inequity within our societies.

Marginalization: What It Means and Why it Matters [↗](#)

This article can support your understanding of the different dimensions of marginalisation and how these can impact employees in your organisation.

Understanding the Emotional Tax on Black Professionals in the Workplace [↗](#)

This article discusses the emotional tax marginalised employees experience and the importance of working towards inclusion alongside diversity in your organisation. It also outlines what inclusion can look like and important considerations for your focus areas within EDI work.

Racial Equity Tools [↗](#)

This website covers a range of key understandings by providing insights on the fundamentals of racial equity and supporting the learning of core concepts for EDI work within your organisation. Exploring the core concepts provides further resources and frameworks to build your understanding of historical inequities and their perpetuating legacies. Also look at <https://www.racialequitytools.org/glossary>.

Guide on Equity, Diversity and Inclusion Terminology [↗](#)

This guide by the Government of Canada establishes a comprehensive overview and descriptions for terminology that you may encounter during your organisations EDI work.

ILO Declaration on Fundamental Principles and Rights at Work [↗](#)

This declaration is an expression of obligations and commitments made by governments, employers, and workers' organisation on upholding basic human rights. It provides the core understanding of your human rights expectations as an organisation.

The Universal Declaration of Human Rights [↗](#)

Drafted by representatives from all over the world, the Universal Declaration of Human Rights is a milestone document that common standard for global human rights for all.

Issue Snapshot: Rights and Wellbeing at Work General Resources [↗](#)

This resource collection organised by the Embedding Project suggests introductory documents and reference materials for you to familiarise yourself with rights and wellbeing at work.

1.2 Surface Structures and Patterns

DESCRIPTION

The structures and practices that make up your company can foster an inclusive, diverse, and equitable workplace, or they can work against it. When you explore the policies, initiatives, practices, and worldviews of your company and identify the structures and any patterns of inequity they give rise to, you gain important insights for your company's EDI journey. If your organisation's initial steps on its EDI journey are likely to be contentious, it can be helpful to conduct a third-party review of your company's workplace culture, to help surface issues with a non-biased, independent lens.

The following actions can help your company uncover inequities in the organisation:

- *Examine your EDI-relevant policies and procedures.*
- *Gather, analyse, and interpret existing EDI data.*
- *Assess your EDI initiatives' scope and objectives.*
- *Determine what additional EDI data and insights you need.*

EXAMINE YOUR EDI-RELEVANT POLICIES AND PROCESSES.

Inventory your company's EDI-relevant policies and procedures. Examine each to understand what unquestioned company perspectives or beliefs they might reveal. Perhaps that education and experience trump other considerations in hiring or advancement? Or that cultural accommodations are at the company's discretion? Consider whether and how each policy might contribute to fostering the workplace culture your company aspires to. Make note of the key areas of EDI that require attention and of the policies and processes that should be overhauled to foster EDI progress.

EXAMPLE: Evolving Policies and Practices at Johnson & Johnson

Examining the company's current policies and practices through an EDI lens helped Johnson & Johnson uncover some shortcomings. An initial assessment surfaced that its non-discrimination policy failed to reference gender identity and expression. A later assessment revealed that the company's benefits plans didn't make any reference to transgender employees.

The company went on to [address these issues](#), adding Gender Identity and Expression to its non-discrimination policy in 2005 and including transgender employees in its benefits plans in 2009.

GATHER, ANALYSE, AND INTERPRET EXISTING EDI DATA.

Work with relevant teams in your organisation to identify what EDI data your company is currently gathering and what information it is disclosing. Review the available data and metrics and analyse them to assess if there are key areas where your company performs poorly. This could include quantitative data such as the percentage of female, racialised, and/or Indigenous employees across all levels of the company and qualitative information like employee experiences. Consider, too, if there are differences between your company's main office(s) and other business locations or sites. Interpret what this information reveals about your company and its performance on key EDI themes.

EXAMPLE: The State of Diversity at Salesforce

Salesforce strives to create a workforce that looks like the world around it. The company has made progress on accelerating representation, but a [2022 audit](#) indicated that the company still has work to do. For example, women only made up 36 per cent of the company's workforce, despite making up 50 per cent of the population, and only 5 per cent of its US workforce was Black/ African American, despite this group making up 14 per cent of the US population.

ASSESS YOUR EDI INITIATIVES' SCOPE AND OBJECTIVES.

Inventory your company's EDI initiatives and review what activities they include, as well as what your company's initiatives seek to achieve. This enables you to map the areas of EDI where efforts are already underway. If your company has already undertaken effectiveness reviews of these initiatives, consult these too. It can be helpful to make note of less effective programs as preliminary possible gaps in your company's EDI efforts.

EXAMPLE: DEI Inventory Review at California State University San Marcos

[California State University San Marcos](#) partnered with a team of researchers to conduct an assessment of the institution's current EDI infrastructure. All divisional areas of the university were invited to complete an EDI questionnaire to create a comprehensive inventory of programs, initiatives, resources, and tools available to faculty, staff, and students. The project aimed to understand the scope of current EDI efforts, whether the efforts were evidence-informed, and what outcomes and areas of impacts were associated with these efforts. The inventory review served as a way for the university to understand the state of EDI and build an evidence-based foundation for aligning future strategy.

DETERMINE WHAT ADDITIONAL EDI DATA AND INSIGHTS YOU NEED.

Based on the EDI data your company collects and the insights you've gleaned so far, consider what other information would help you to better understand your company's EDI performance. Also review leading disclosure and performance standards and EDI benchmarks for examples to understand which EDI metrics could provide useful insights for your company. It is useful to capture what types of meaningful insights are currently impossible due to data limitations.

EXAMPLE: Beginning IDEA Work at Perkins & Co.

When beginning to scope the work required for Diversity, Equity, Inclusion, and Accessibility (IDEA) work at [Perkins & Co.](#), the company realised it needed more information on its workforce to guide its efforts. The company used surveys to understand baseline sentiments about IDEA across their workforce, developing a greater understanding of fairness and equity challenges from its employees' perspective. These insights offered an opportunity to tailor their IDEA strategy to intentionally focus on areas that mattered most to its workforce.

1.2 Surface Structures and Patterns

[The Global Diversity, Equity, and Inclusion Benchmarks \(GDEIB\)](#) [↗](#)

These Diversity, Equity and Inclusion benchmarks propose result-focused standards to support your organisations strategy for managing towards inclusivity and comprehensive EDI development.

[ISO 40415 Human Resource Management – Diversity and Inclusion](#) [↗](#)

This ISO standard provides guidance on EDI pre-requisites your organisation should be aware of, accountability and responsibility within EDI work, approaches for developing an inclusive workplace, and identifying objectives relevant to your organisation.

[Diversity, Equity, and Inclusion \(DEI\) Organisational Assessment Tools: A Resource Guide](#) [↗](#)

This snapshot provides a list of resources for general and some industry specific assessments on EDI.

[How Managers can Dismantle “Benevolent Marginalization”](#) [↗](#)

This Harvard Business Review article provides insights into how to recognise benevolent marginalisation (a form of subtle discrimination where good intentions can cause harm) and offers strategies to foster more inclusive approaches.

[6 Ways to Assess Your Organisation’s Equity, Diversity, And Inclusion](#) [↗](#)

This article by Queens University Industrial Relations Centre lists six questions for companies to ask themselves to help assess the state of EDI within their organisation.

[Questioning through an Equity, Diversity, and Inclusion Lens](#) [↗](#)

This set of questions from the Edmonton Chamber of Voluntary Organisations was designed to help highlight presences and absences or perspectives and groups of people in policy and practice contexts.

[To Understand Whether Your Company Is Inclusive, Map How Your Employees Interact](#) [↗](#)

This article provides guidance on visually mapping employee interactions and connections in the workplace to understand where there may be barriers to true inclusion.

[The Five Stages of DEI Maturity](#) [↗](#)

This article aligns EDI into five stages and includes questions to guide your understanding of where your company is and where you may need to focus your energy.

[Horrible workplaces: The signs of a hostile work environment and what to do about it](#) [↗](#)

This article from Resources for Employers helps can help companies to identify patterns of behaviour that contribute to creating a hostile workplace.

1.3 Listen

DESCRIPTION

Seek input and feedback from employees to gain insight into their experiences and deepen your understanding of the issues and underlying needs within your organisation. Proactive efforts to listen can help clarify the challenges your organisation faces and inform how you might address them.

The following actions can help your company to ensure it listens to employees and other knowledge holders to inform its EDI efforts:

- *Create opportunities for feedback and input.*
- *Protect those who speak up.*
- *Learn from knowledge holders.*

CREATE OPPORTUNITIES FOR FEEDBACK AND INPUT.

Seeking out feedback from a diverse range of employees provides meaningful insights into their experience of your organisation's workplace culture and of the effect of your EDI initiatives. Similarly, proactively seeking out input on new initiatives or policies from targeted groups of employees can help to ensure your company considers key perspectives and designs more thoughtful initiatives. Formal feedback approaches can include feedback mechanisms, surveys, and diversely composed committees or working groups. In organisations with unions, work councils, or joint consultation committees, these representative bodies can help detect and highlight challenges as they emerge. Informal options can include townhalls, social networks, and informal feedback, at the water cooler or through open-door policies. Ensure that all opportunities for input are inclusive, accessible, and align with how your employees communicate. Recognise that your employees are likely to vary in terms of their skills and confidence in speaking up at work. Provide all employees with the mentorship, peer support, and technical and soft-skills training needed to ensure that they can effectively participate and have their voices heard.

EXAMPLE: Microsoft's employee EDI surveys

Microsoft considers employee feedback to be essential in its ongoing EDI improvement efforts and conducts a biannual company-wide survey, titled "[Employee Signals](#)." The survey focuses on experiences, with an emphasis on feelings of inclusion and measuring employees' sense of purpose within their roles. Microsoft's objective is to understand what employees experience, feel, and prefer through specific questions in key EDI issue areas, without making assumptions.

EXAMPLE: The Delta Board Council

Delta Air Lines (Delta) has a comprehensive employee involvement program that includes townhall meetings, departmental forums and councils, surveys, and continuous improvement teams. [The Delta Board Council \(DBC\)](#), which was launched in 1996, represents the company's non-union employees. Its responsibilities include gathering the pulse of the company through site visits, representing employees' interests, and providing feedback on management policies and communications. It is comprised of representative members from each of the company's main non-union employee units. The DBC participates at the board level through a non-voting seat and has regular access to the company's executives.

PROTECT THOSE WHO SPEAK UP.

It is important that employees feel safe to speak up about major issues or concerns, including harassment or violations of ethical and expected behaviour. Ensure internal feedback mechanisms outline a clear and transparent process for receiving, evaluating, and addressing issues. Any employee should be able to provide feedback or share concerns anonymously, if desired, and always without fear of retaliation or reprisals. Whistleblowers channels are part of your company's feedback procedure and ideally include a hotline, website, and email managed by a third party. Employees should be able to directly contact the senior leader responsible for your whistleblower program, if preferred. Lastly, it is important that your company take all feedback seriously and address it promptly and fairly, to help build trust in the process.

EXAMPLE: Ontario Securities Commission Policy 15-601: Whistleblower Program

The Ontario Securities Commission (OSC) implemented a [whistleblower program](#) to encourage individuals to report concerns regarding serious misconduct. The program policy outlines anonymity and confidentiality for whistleblowers alongside protections from reprisal regardless of whether the information results in action. It also includes a financial incentive depending on eligibility of the information provided, to encourage feedback that can help the organisation uncover critical issues.

LEARN FROM KEY KNOWLEDGE HOLDERS.

Knowledge holders can be an essential source of information to gain insights that your employees are unable to provide or may be hesitant to share. Discussing workplace challenges can be emotionally taxing or make an employee feel vulnerable to adverse perceptions and reprisals. Communicate with internal stakeholder bodies, such as employee well-being committees or employee resource

groups (ERGs), to understand their perspectives. Engage with relevant external community organisations or specific groups or knowledge holders to better understand the experience of specific groups in your company and what solutions might work. Find the right specialists for your company's challenges to build internal capabilities and learn from key experts.

EXAMPLE: Teck Red Dog Operations – “Communicating Across Cultures” Program

At Teck's Red Dog Operations in Alaska, cultural differences between the local Iñupiat workers and Western management styles created the potential for miscommunication and other inter-cultural challenges. In response, Teck established the [“Communicating Across Cultures”](#) program to support cross-cultural understanding and foster career opportunities for and retention of Iñupiat employees. Facilitated by a local community leader and expert, the program educates on local Iñupiaq culture and creates space for different cultural expressions. This helps Teck to better understand the challenges its Iñupiat workers face and create a more inclusive operation.

1.3 Listen

Guiding Principles for Business and Human Rights: Implementing the United Nations “Protect, Respect and Remedy” Framework [↗](#)

These guiding principles by the Office of the High Commissioner for Human Rights provides direction for preventing and addressing human rights impacts from your organisation’s activities, including how to design a feedback mechanism.

How to Build an Anti-Racist Company [↗](#)

This article outlines guidance to begin fostering EDI in your organisation. It touches on key actions to pursue to create inclusive cultures, beginning with the importance of actively listening and learning.

Workplace Democracy for the 21st Century [↗](#)

Drawing on extensive research, this report discusses traditional and contemporary approaches to worker voice in Canada and beyond.

Closing the Voice Gap: Recommendations from the Ontario Assembly on Workplace Democracy [↗](#)

This report summarises key takeaways and recommendations from the 2022 Ontario Assembly on Workplace Democracy, in which a randomly selected cross-section of Ontario residents learned and deliberated about their experiences voicing at work. Section 32 covers recommendations for what employers can do to support the collective voice of workers.

Throw Out Your Assumptions About Whistleblowing [↗](#)

This article breaks down assumptions about whistleblowing reports, explaining how companies can better understand and use their whistleblowing systems.

How To Use Continuous Listening to Strengthen Your DEI Strategy [↗](#)

This article touches on the importance on continuous learning and connection to employees, outlining suggestions for EDI items to include in your surveys to gain a better understanding of their experiences.

Using Candidate and Employee Feedback to Drive DEI [↗](#)

This article by Lever describes various types of employee feedback opportunities and includes examples for statements and questions to include in feedback mechanisms to gain a better understanding of employee experiences.

The Failure of the DEI Industrial Complex [↗](#)

This article discusses how a lack of standards and accountability for EDI practitioners can create ineffective interventions, outlining the importance of understanding what your unique needs to solve some of these issues

1.4 Identify Strengths and Issues

DESCRIPTION

Use your insights about your company's structures and workplace culture to assess your company's core EDI challenges as well as where your efforts already foster an inclusive, diverse, and equitable workplace. Recognising key issues and strengths helps to surface opportunities and provide the broad direction and priorities for a robust EDI program that strategically targets the issues most relevant to your company.

You can identify your organisations strengths and areas of focus through the following actions:

- *Develop an understanding of your core EDI issues.*
- *Understand your strengths, capacities, and resources.*
- *Identify the core areas of focus.*

DEVELOP AN UNDERSTANDING OF YOUR CORE EDI ISSUES.

To identify your company's core EDI challenges, compile the key findings from your efforts to surface structures and patterns and to listen to employees and knowledge holders. Determine the EDI areas on which your company has the greatest adverse impacts and the areas where you've heard feedback that change is needed. Add to this list the potential gaps you uncovered in identifying where your company falls short of expected corporate EDI practice, where your company may not yet comply with relevant legislation. Capture the scope of these gaps and what may need to be done to address them, as these are your organisation's core EDI issues.

UNDERSTAND YOUR STRENGTHS, CAPACITIES, AND RESOURCES.

Identify your organisational strengths by identifying which key roles, processes, practices, and initiatives already contribute to success in fostering an inclusive, equitable workplace. Understand your company's capacity to undertake new EDI work, so that your company can ensure it allocates adequate funds and time to the implementation of future strategies and initiatives. Compile a broad list of skills you expect will be needed for your company's EDI journey and assess too what skills, experience, and competencies your teams already have and what experience and expertise your organisation may need to recruit or tender for.

EXAMPLE: EDI Competencies at Colorado State University

Colorado State University uses the Toronto Region Immigrant Employment Council's (TREIC) [model](#) for EDI competencies. The [organisation started](#) by acknowledging that differing experiences and backgrounds affect employees' workplace experiences and treatment. The University then identified the practices, competencies, and skills that individuals should cultivate to support building an equitable work environment and has created a list of core competencies for individuals, teams, and the organisation alongside descriptions of how these competencies can be applied in the workplace and interpersonally.

IDENTIFY THE CORE AREAS OF FOCUS.

Take your list of core EDI issues and add the contributing factors that you found must be addressed. Then rank the EDI issues, based on where your organisation most significantly falls short of expected practice and where employees expressed most adverse impact. Also look out for opportunities to create synergies and so-called low-hanging fruits that may not require major efforts to succeed. Early wins can often be a great motivator. These are the key areas where your company should focus its EDI efforts. Those priority areas will evolve over time, as your company

advances on its EDI journey. Consider also how to meaningfully sequence your EDI efforts, whether your organisation intends to start small and scale up or simply need to prioritise resource allocation.

EXAMPLE: Focusing on Wages at Clark House Hospitality

A New York restaurant group, [Clark House Hospitality](#), recognised the need to prioritise equitable wages and opportunities for employees with less experience and from local low-income population groups. The company now pays all starting employees a living wage and combines this with in-house learning opportunities to support employee capacity building and broaden their career prospects.

EXAMPLE: Sodexo's Corporate and Social Responsibility Commitments

[Sodexo](#) uses a model that outlines their areas of focus in terms of impact on individuals, impact on communities, and impact on the environment split further into the company's role as an employer, a service provider, and as a corporate citizen.

1.4 Identify Strengths and Issues

Inclusive Workplace Competencies [↗](#)

This resource breaks down competencies individuals, teams, and organisations need to foster an inclusive workplace. It also offers insights on underlying principles that should guide your journey and how to use these competencies to their fullest extent.

5 Steps to Find Your Diversity Weaknesses [↗](#)

This article offers different avenues to consider when analysing your organisation's possible areas of growth and learning within your EDI journey.

Are Your Organisations DEI Efforts Superficial or Structural? [↗](#)

This article offers a framework to assess whether your current efforts are addressing your key areas of focus in a meaningful way by providing questions for self-examination.

7 Skills That Make a Real Difference in Diversity and Inclusion [↗](#)

This article outlines skills that you should hone to foster inclusivity and belonging within your interactions in your organisation.

2

COMMIT

[2.1 Align on Intent](#)

[2.2 Set Strategy](#)

[2.3 Co-Design Solutions and Work Plans](#)

[2.4 Allocate Resources](#)

[2.5 Take a Public Position](#)

2.1 Align on Intent

DESCRIPTION

To foster an equitable, diverse, and inclusive workplace, your organisation and its leaders must be aligned on your company's intent. Draw on the work that you did to understand EDI in your company and its context. A shared understanding of EDI and your company's priorities provides a critical shared approach and strategic framing for your organisation's EDI journey. Alignment on intent helps individuals and teams across your organisation to assess how their efforts can best support the company's EDI vision and objectives. This work tends to be more effective if your leaders have a foundational understanding of EDI and your organisation's challenges. You may need to gauge their readiness and think about the sequencing of this work.

Addressing fear and loss

Cultural change efforts like a company's EDI journey can trigger feelings of fear and loss, especially in those who have benefited from the status quo or feel unfamiliar with EDI concepts and practices. This means that launching EDI efforts may require a process of socialisation in your company and may surface a need for further work to address challenges related to fear and loss. See [Address Fear and Loss](#) for steps your company can take to address these feelings.

The following actions can help you to align your organisation's intentions on EDI:

- *Invite senior leaders.*
- *Support leadership capacity to engage in this work.*
- *Clarify your leadership's intent and aspirations.*
- *Support senior leaders to become visible champions.*

INVITE SENIOR LEADERS

Your organisation's senior leadership is ultimately accountable for the success of your organisation's EDI efforts. It is important to bring along the entire organisation and its leadership on your EDI journey;

not only those with an interest in EDI. Ideally, you would enlist all senior leaders and proactively secure their buy-in and support, but at minimum do so with senior leaders whose responsibilities intersect with EDI at your organisation. To gain support, help your company's senior leaders to

understand the strategic relevance of EDI to your organisation. And help them to identify the key ways in which their role and/or department can contribute to and benefit from the organisation's EDI journey. And make clear their input is needed to ensure your company can undertake the EDI approach that is most strategic for your organisation.

EXAMPLE: Engaging Leaders at Avantor

At [Avantor](#), EDI leaders regularly invite senior leaders into EDI conversations and support their involvement through regular updates on EDI initiatives. The organisation found that the engagement and updates worked help to reinforce the importance of EDI and clarified what the EDI team needed from executive in terms of participation, support, and engagement.

SUPPORT LEADERSHIP CAPACITY TO ENGAGE IN THIS WORK

In many organisations, EDI expertise and understanding of its strategic relevance to the organisation is limited to specialists. To ensure meaningful participation on your EDI journey by your company's leadership, it can be helpful to foster proactive capacity building. You can start by sharing your organisation's findings from the Understand phase to illustrate the core EDI challenges and key work to be done. It can be useful to conduct an independent review of your leadership's EDI competencies, to help focus your capacity building efforts. You can offer training for your senior leadership. You can also create opportunities for your leadership to have exposure to or first-hand accounts of the main EDI challenges the company needs to address, to foster better understanding and buy-in for action. Lastly, helping leaders to reflect on their own privilege and complicity in structures of inequality can be a challenging but meaningful impetus for action.

Investing in People

Helping your company's senior leaders gain the insights and competencies they need to effectively engage in EDI work may require training on EDI challenges or core concepts and practices. See [Invest in People](#) for capability building approaches your company can adopt. [Address Fear and Loss](#) can help you to explore how your company can support its leaders in confronting their complicity and take meaningful action.

EXAMPLE: Allyship at Microsoft

[Microsoft India](#) invited its country senior leaders to attend sessions that explored key EDI concepts such as allyship and privilege tailored to their local context. Encouraging conversations on identity and enhancing knowledge of these core EDI concepts created opportunities for challenging and critical discussions and equipped leaders with new allyship practices. They also helped leaders to engage with and contribute to internal and local efforts to shift behaviours, providing first-hand insight into the importance of allyship in addressing inequity for marginalised groups.

EXAMPLE: Helping Leaders Confront Complicity

Embedding Project researchers [invited](#) company leaders to reflect on their privilege through a series of workshops that addressed a range of critical societal issues in different industries. Structured questions guided leaders to explore and acknowledge their company's and personal complicity in the status quo that contributes to social inequities and environmental degradation, but also to embrace the discomfort of this awareness and use it as a driving force to take action.

CLARIFY YOUR LEADERSHIP'S INTENT AND ASPIRATIONS.

Bring senior leaders together to reflect on how fostering a diverse, equitable and inclusive workplace aligns with the company's values and purpose. Encourage them to discuss whether your company's values and purpose include and support EDI. If leaders feel EDI is not yet well reflected in the values and purpose, it may be time to revisit your company's values and purpose. Also reflect on why your company is undertaking EDI efforts and what overall vision it seeks to achieve. Encourage them to reflect on what a diverse, inclusive, and equitable company would look like, and consider seeking feedback on this aspiration. It can often be helpful to move your organisation away from purely moral imperatives and obligations around EDI to understanding strategic relevance. Capture their intent and aspirations to formalise them to inform the Set Strategy step of your company's EDI journey.

EXAMPLE: Gender equality and women's empowerment at Unilever

[Unilever](#) recognised that gender equality must be a key theme in its efforts to pursue an equitable workplace for all. Unilever aligned its leadership on the company's aspirations for equality within the organisation and extended its ambition across the supply chain, where it focuses on expanding opportunities for women's participation and employment within operations and retail value chains, as well as the wider society through collaboration with others. Gender equality is now integrated in Unilever's overarching Compass Strategy, which outlines the company's strategic intent to work towards social responsibility and challenging gender issues are a critical component within the organisation's current leadership and culture goals.

SUPPORT SENIOR LEADERS TO BECOME VISIBLE CHAMPIONS.

The success of an organisational culture shift relies on leadership endorsement, reiteration, and modelling of the change your company aspires to. Support your leaders in building the competencies that will enable them to be visible champions of your company's EDI journey and model the leadership styles and interpersonal behaviours your company seeks to embed across the organisation. You can support them with training on dialogue and listening skills, by building their understanding of and capacity for allyship, and help them to craft meaningful stories about their own EDI journey and EDI at your organisation which can help set the tone for how EDI is perceived across your organisation. Modelling vulnerability and willingness to learn from others can also be crucial competencies when leaders are embarking on their own EDI journey too.

EXAMPLE: Modo's EDI Journey

Leadership involvement and endorsement are central to [Modo's EDI journey](#). The company developed a video series, available publicly, that demonstrates a clear link between EDI and company purpose and that showcase company's leaders actively contributing to a more inclusive co-op. Key executives lead by example, and speak directly to share insights, passions, and key concepts that acknowledge the role they play during this process.

2.1 Align on Intent

[Driving Diversity and Inclusion – The Role for Chairs and CEOs](#) [↗](#)

This article provides insights and takeaways on how chairs and executives can support and drive change on your company's EDI agenda.

[Making the Case for Diversity, Equity, and Inclusion](#) [↗](#)

This resource by the Canadian Center for Diversity and Inclusion offers a guide on developing a business case for EDI including reflection questions to guide your process.

[Capacity Building for Shared Equity Leadership: Approaches and Considerations for the Work](#) [↗](#)

This report identifies strategies to build capacity at personal, collective, and organisational levels for shared leadership and EDI.

[How to Keep senior Leadership Engaged in DEI Strategies](#) [↗](#)

This article offers strategies to keep leadership engaged and committed to EDI, including the importance of providing learning opportunities and sharing EDI data.

[PAS 808: Purpose-Driven Organisations: Worldviews, Principles and Behaviours](#) [↗](#)

This guidance document from the BSI Group is a good starting point for business leaders, executives, and governance professionals who want to understand what it means to be a purpose-driven organisation, and how such organisations approach decisions-making.

[Supporting Your CEO](#) [↗](#)

This guide from the Embedding Project was created to help sustainability change agents think about how to support their CEO in embedding sustainability into the strategies and day-to-day decisions of their organisations.

[Being an Effective Change Agent](#) [↗](#)

This guide from the Embedding Project was designed to share insights on how change agents can support their CEO and influence thinking on sustainability.

[Becoming an Agent of Change](#) [↗](#)

This guide from the Embedding Project provides insights on the process of privileged insiders becoming agents of change and working towards societal benefits and details a process of helping leaders confront their own privilege and complicity.

2.2 Set Strategy

DESCRIPTION

Employees, customers, and other stakeholders expect to see meaningful corporate action on issues including EDI. Create an EDI strategy, fit to address your company's unique challenges, that details how and why your company intends to transition to a diverse, inclusive, and equitable workplace culture. Set credible goals that are clear, measurable, and timebound on topics that are relevant to business success and sustainability and a plan to achieve them. Credible goals, suited to your company, can help your organisation to ensure and demonstrate it focuses its EDI efforts meaningfully and strategically.

The following actions can help your company to design a fit-for-purpose EDI strategy:

- *Establish guiding principles.*
- *Articulate the strategic relevance of EDI and your organisations vision.*
- *Set baselines and benchmarks.*
- *Set goals, commitments, and interim targets.*

ESTABLISH GUIDING PRINCIPLES.

To identify your company's core EDI challenges, compile the key findings from your efforts to surface structures and patterns and to listen to employees and knowledge holders. Determine the EDI areas on which your company has the greatest adverse impacts and the areas where you've heard feedback that change is needed. Add to this list the potential gaps you uncovered in identifying where your company falls short of expected corporate EDI practice, where your company may not yet comply with relevant legislation. Capture the scope of these gaps and what may need to be done to address them, as these are your organisation's core EDI issues.

EXAMPLE: Guiding Principles at McMaster and HEC Montreal

McMaster University and HEC Montreal have both established a clear set of guiding principles within their EDI respective strategies to orient further commitments, actions, and initiatives as part of their EDI journeys. [McMaster's Guiding Principles for Best Practice](#) address topics such as cultural relevance, power relations and systemic inequities, and building capacity for EDI work.

[HEC Montreal's guiding principles](#) provide greater focus on the goals and commitments that all further actions should align with, including overarching aspects such as the importance of diversity to collective excellence and respectful environments.

EXAMPLE: Translink's EDI Guiding Principles

Translink frames its [EDI guiding principles](#) as clear, concise, and straightforward statements that set the tone for the organisation's EDI strategy. The statements include accountability for missteps, serving communities, and creating workplace environments where individuals can bring their best selves to work.

ARTICULATE THE STRATEGIC RELEVANCE OF EDI.

Building on the EDI intent of your company's leaders and the learnings from the [Understand](#) phase, explore your company's risks and opportunities associated with EDI. Consider especially where your company has adverse EDI-related impacts, what expectations it falls short of, and what EDI challenges have the potential to negatively impact the business. Use these insights to determine the strategic relevance to

your organisation of EDI and, specifically, of the core challenges your organisation needs to address. Articulating the strategic relevance of EDI helps your organisation to set more meaningful goals and targets. And, conversely, a narrow focus on EDI targets without their strategic context can undermine your organisation's broader EDI ambitions.

EXAMPLE: Human Rights Issues at Mars

In consultation with human rights experts and through its human rights due diligence efforts, [Mars](#) identified living incomes, gender discrimination, health and safety, forced labour, and child labour as severe risks throughout its supply chains. The company articulated the impact and importance of these risks, focusing in on the most high-risk components to ensure the company complies with regulations and aligns with its overarching goal for everyone within their business and value chain be treated with fairness, dignity, and respect.

EXAMPLE: Inclusive hiring at American Express

Being clear on its intent, aspirations, and the strategic relevance of EDI helped [American Express](#) gain support from its recruitment team to focus on inclusive hiring. The team recognised its role in contributing to the company's broader vision for EDI and now includes more objective terminology in job descriptions, leverages skills-based hiring criteria, and reflects on the company's commitment to EDI in its recruitment marketing.

SET BASELINES AND BENCHMARKS.

Once your company has identified its strategic imperative for taking EDI action, determine where your organisation is at. Review your findings from the Understand phase to establish baselines. And conduct further research where your company's existing data provides insufficient information to measure future progress. This is often an opportune time to establish or refine your company's data

gathering and analysis processes and storage protocols. Your company's baseline information will be the starting point for setting goals and targets. Next, benchmark what EDI goals and targets other companies have set (both your peers and leading companies in other industries) to better understand the scope of others' EDI efforts. Global benchmarks, performance standards, and the Embedding Project's [goals database](#) are great places to start.

EXAMPLE: Benchmarking Racial Equity Goals

Companies seeking to better understand the scope of the ambitions on racial equity of other companies and consult the [Embedding Project's Position Database](#). They would find that Bank of America has committed \$1 billion over four years to help local communities address economic and racial inequality accelerated by the Covid-19 pandemic; Pearson PLC has committed to representation within management that reflect the racial, ethnic, and gender diversity of the geographies in which it operates by 2025; and Whirlpool Corporation has set a goal to increase Black representation throughout the company by 50 per cent by 2025.

SET GOALS, COMMITMENTS, AND INTERIM TARGETS.

Building on the previous steps, your company can now set its EDI goals and make commitments. The goals your company sets should signal the action that is required to achieve your company's EDI ambition, outline the timeframe, and detail the interim steps your company needs to take to get there. Your interim targets should be realistic and reflect the key investments needed to meet your goals. For EDI goalsetting, companies sometimes assume they should start by setting performance targets or representation quotas. However, for companies earlier on their EDI journey, the most meaningful goals are often process goals, focused on building your company's understanding, before setting performance goals. Being transparent about the assumptions used in setting goals as

well as your progress on them helps build trust and facilitates feedback. It is good practice to engage those affected by your company's goals and provide opportunities for their input or feedback, as addressed in [Listen](#).

EXAMPLE: Accenture's Gender Parity Goal

In 2017, [Accenture](#) committed to achieving a gender-balanced workforce, with 50 percent women and 50 percent men, by 2025. At the time of setting the goal, women made up nearly 40 percent of its global workforce. The company's previous milestones on the path to gender equality included setting a goal to reach 40 percent women new hires by 2017 (which Accenture achieved a year early), promoting its largest percentage of women to the managing director level in 2016 (30 percent); and growing its percentage of women managing directors to 25 percent globally by 2020. Publicly articulating goals and interim targets, as well as disclosing progress (or lack thereof) helps build credibility and trust.

2.2 Set Strategy

Corporate Human Rights Benchmark [↗](#)

These benchmarks provide a comparative look into policies and practices that large companies in high-risk sectors must address and the efforts expected to embed a human rights approach to their business.

The Women's Empowerment Principles Gender Gap Analysis Tool [↗](#)

This tool developed by UN Women can help you identify strengths and opportunities for improvement to advance gender equality within your business.

The Global Diversity, Equity, and Inclusion Benchmarks (GDEIB) [↗](#)

These Diversity, Equity and Inclusion benchmarks propose result-focused standards to support your organisations strategy for managing towards inclusivity and comprehensive EDI development.

Embedded Strategies for the Sustainability Transition: Setting Priorities and Goals Aligned with Systems Resilience [↗](#)

This resource by the Embedding Project outlines concepts and tools to support a shift towards strategies that use the generative potential of businesses for social good.

How Companies Should Set – and Report – DEI Goals [↗](#)

This article provides insights on setting goals that foster transparency and accountability as well as the importance on action plans to support meaningful change.

How Companies Can Recommit to Their DEI Goals [↗](#)

This podcast from Harvard Business Review IdeaCast explains the importance of revisiting and recommitting to EDI goals, especially in the face of reduced momentum and economic struggles across the world.

Sustainability Goals Database [↗](#)

To help companies develop strong, clear positions, the Embedding Project maintains a public database containing leading sustainability goals and set by large companies globally. It includes over 1,000 goals and is updated weekly.

Setting Strong Sustainability Goals Can Feel Hard. It Doesn't Have To. [↗](#)

This blog article from the Embedding Project sets out a list of seven straight-forward questions to help you review your company's existing goals, or to consider as you develop your next round of sustainability goals.

Targeting Value: Setting, Tracking & Integrating High-Impact Sustainability Goals [!\[\]\(1e1a06ebca281395f282cf61b1470f88_img.jpg\)](#)

This comprehensive report from SustainAbility provides clear insights on the value of setting, pursuing, achieving, and reporting on sustainability goals. The report explores current best practices for ensuring goals deliver maximum business value and broader societal impact, explains the value of context-based goals, identifies key barriers to setting high-impact goals, and offers methods for overcoming them.

Sustainability Benchmarking Good Practice Guide [!\[\]\(19f0d8884a7d0fabc1023db5dd2e1ce8_img.jpg\)](#)

This guide from ISEAL introduces a framework and practical set of good practices for organisations that want to carry out a benchmarking exercise.

Ceres Roadmap 2030: Equity, Diversity, and Inclusion [!\[\]\(49760b02c8a146741c00a37430e2b11c_img.jpg\)](#)

The Ceres Roadmap 2030 presents a vision for sustainable business leadership and includes a pathway for equity, diversity, and inclusion. It provides a practical 10-year action plan to help companies strategically navigate this new and ever-changing business reality and thrive in the accelerated transition to a more equitable, just, and sustainable economy.

2.3 Co-Design Solutions and Work Plans

DESCRIPTION

Work collaboratively on designing solutions and work plans for your company's EDI challenges to leverage the collective wisdom, experience, and expertise of individuals across the business. Co-design can lead to more fit-for-purpose solutions and plans, increased ownership and commitment across the organisation, improved collaboration and communication, enhanced alignment with organisational objectives, better problem-solving and innovation, and opportunities for knowledge sharing and learning.

The following actions can help you to ensure your company designs effective solutions and plans that meet your needs:

- *Co-design solutions to EDI challenges.*
- *Co-develop work plans.*
- *Leverage pilots and action learning.*

CO-DESIGN SOLUTIONS TO EDI CHALLENGES.

Many EDI challenges are complex systems issues. Seek out and involve individuals within your organisation that can contribute relevant insights into the design of EDI initiatives, policies, procedures, capacity building, and communications, whether through expertise, skills, work experience, or lived experience. Compensate employees for their contributions if these exceed the responsibilities of their role. It is important to recognise the distinction between lived experience and expertise: lived experience does not always equip an employee to lead or advise on EDI. Ensure your organisation consults experts where appropriate and does not offload the responsibility onto marginalised employees. Consider also that consulting individuals with lived experience may take an emotional toll on them: their participation should be voluntary. Co-design is often a longer process: ensure timelines enable this. Consider focusing on mutually reinforcing solutions that drive progress together rather than compete for resources and attention.

from every level of the organisation. The council works to ensure vertical and horizontal integration of insights across all of Enterprise Holding's operations, strategies, missions, and objectives. This multi-dimensional approach allows employees to contribute their diverse perspectives on key issues and helps Enterprise Holdings to pursue more meaningful change for its workforce.

CO-DEVELOP WORK PLANS

Many EDI solutions require cross-functional or company-wide engagement or implementation to be successful, from hiring practices to leave policies. Assemble representatives from all departments or teams whose participation is needed and craft practical workplans to implement the solutions that will help your company to achieve its goals and targets. Engage external EDI experts where needed to plan the implementation of new or unfamiliar solutions. Be sure to assign clear roles and responsibilities, as well as accountability for all elements of your company's work plans. Clarifying the time and resource requirements of your workplans will also help you to secure adequate budgets. As part of your planning schedule regular reviews to monitor and help ensure progress.

EXAMPLE: EDI Councils at Enterprise Holdings

Enterprise Holdings established [a global EDI council structure](#) to support its efforts of creating solutions that encompass perspectives

EXAMPLE: Reconciliation Action Plans

Australian construction and real estate company Lendlease developed a [Reconciliation Action Plan](#) with a work plan on how the company will make progress towards its goals on reconciliation with Australia's First Nations peoples. The work plan is set out in table form, with commitments, deliverables, timelines, and accountability included. Adobe Australia and New Zealand's [Reconciliation Action Plan](#) follows a similar format: It details the company's vision, guiding principles, and focus and presents a work plan set out in table form, including actions, deliverables, timelines, and responsibility. Both work plans were developed in conjunction with external Australian First Nations partners and include messages of support the company's most senior leader.

EXAMPLE: The Government of Canada's Dimensions Pilot Program

The Government of Canada's [Dimensions pilot program](#) was codeveloped with a cohort of 17 post-secondary institutions across Canada and seeks to foster transformative change across scholarly and research ecosystems. It aims to address systemic barriers by supporting equitable access to funding opportunities, increasing participation, and embedding EDI within research design. The pilot program has resulted in a charter that universities can endorse to show commitment and in a recognition program. The cohort universities now have a designated Dimensions team within their research process that is collecting internal data and supporting the development of an EDI action plan.

LEVERAGE PILOTS AND ACTION LEARNING.

Pilot projects provide an opportunity to test out EDI initiatives. Pilots typically provide a safe container to take risks and test ideas without possibly significant losses or adverse impacts on our company. They can provide valuable insights into what work or where pivots or refinements are needed prior to broader implementation. Determine the pilot's resource requirements, including budget, personnel, technology, and any external expertise required and, if possible, secure a commitment to scale up the initiative if successful. Action learning involves a small, dedicated group focused on tackling a complex EDI challenge, by critically exploring it, designing creative solutions, taking collaborative action together (rather than just making recommendations), and taking individual and organisational learnings forward into future iterations or challenges. Be sure to clarify role of the action learning group members, offer training and resources to support EDI understanding, and foster a culture of continuous learning and reflection. Consider integrating action learning practices in a pilot initiative.

EXAMPLE: The University of British Columbia's EDI Action Network

The University of British Columbia (UBC)'s [EDI Action Network](#) aims to create space and build capacity for EDI work with community members across UBC through connection and information exchanges. Over the years, the network has created connections that have promoted collective support on a range of projects under different units and departments within the university. [Examples include](#) the Inclusion Self-Assessment Tools pilot in the Arts Co-operative Education Program and the incorporation of EDI into the faculty merit process in the School of Biomedical Engineering.

2.3 Co-Design Solutions and Workplans

Sustainability Action Plan: guidance and template [↗](#)

This article from IBM lays out practical guidance on how to create a Sustainability Action Plan along with recommended inclusions and structure. It includes a free Sustainability Action Plan template for download to support your sustainability and environmental, social and governance (ESG) goals.

Evidence-Based Diversity, Equity, and Inclusion Practices [↗](#)

This report outlines research on key EDI practices across the U.S. distributed workforce and can offer guidance on recommended actions and best practices to enhance your efforts to improve inclusivity in your workplace culture.

IFC's Gender and Infrastructure Toolkit [↗](#)

This toolkit offers a range of tool suites that cover all aspects of operations. Tool Suite 1 includes guidance on increasing gender diversity from the workforce to the board room, Tool Suite 2 covers women-owned businesses in the supply chain, Tool Suite 3 includes the importance of supporting women within community engagement efforts, and Tool Suite 4 addresses gender-based violence in the workforce.

What is Action Learning? [↗](#)

These insights from the World Institute for Action Learning discusses the importance of action learning, including insightful questioning and reflective listening within your organisation, and provides insights on the components of action learning.

Designing for Diversity, Equity, and Inclusion in the Workplace [↗](#)

This article offers key considerations for the organisational design process of your organisation.

Advancing Gender Balance in the Workforce: A Collective Responsibility [↗](#)

This report provides examples of gender balance initiatives across companies and governmental bodies to assist with guiding practices that may work for your organisation.

Solutions Privilege: How Privilege Shapes the Expectations of Solutions, and Why It's Bad for Our Work Addressing Systemic Injustice [↗](#)

This article outlines the concept of "solutions privilege" which refers to the ability to expect easy solutions that align with your worldview and don't challenge your privilege. Understanding and resisting this expectation for others to provide solutions to problems that we are complicit in creating is key for designing effective EDI solutions.

How Corporate Diversity Efforts Trap Workers of Colour [↗](#)

This article by the BBC discusses how the burden to design and implement EDI initiatives unduly falls on employees of colour – often as invisible labour that is neither supported by additional compensation or included within promotion tracks.

No, Every Person of Colour Does Not Need to Be a DEI Professional [↗](#)

This article highlights the importance of expertise alongside lived experience and understanding the consideration of who is equipped and wants to lead EDI efforts in your organisation.

2.4 Allocate Resources

DESCRIPTION

Ensuring your company allocates adequate resources to its EDI work plans is an indispensable step on your company's EDI journey. Prepare a compelling business case that goes beyond a moral argument and ensure you have clear understanding of the resources required. Allocating adequate resources in your company's annual budgets demonstrates your company's commitment to its EDI journey and ensures your company can make the required efforts. Careful resource allocation can help your company ensure it meets its objectives efficiently and optimises the utilisation of available resources. Regular monitoring and adjustments ensure that resources are aligned with evolving requirements, maximising the chances of successful work plan completion.

The following actions can help you to purposefully allocate resources:

- *Develop adequate budgets.*
- *Build a compelling business case.*

DEVELOP ADEQUATE BUDGETS.

Allocating resources to each action in your work plan is a crucial aspect of ensuring its successful execution. Begin by inviting those responsible for work plan implementation to inform the budget. Ask them to identify the specific resources required to implement the work plan effectively. This includes financial resources, personnel with the necessary skills and expertise, equipment, technology, and any other tangible or intangible assets needed to accomplish the plan's objectives. Look at the availability and sufficiency of the resources you currently have within your organisation and identify any gaps or areas where additional resources may be needed. Develop a clear strategy for allocating resources effectively. Consider factors such as the timeline of the plan, dependencies between activities, and the availability of resources at different stages. Determine how resources will be allocated, distributed, and monitored throughout the plan's execution.

EXAMPLE: Diversity Budgets at University of Michigan

The University of Michigan integrates EDI considerations in all budgeting procedures at the University to make it an institutionalised part of budget planning, rather than a separate process. Every budget holds space for a designated EDI component to ensure continuous and strategic funding for EDI. The University achieved this by including the Chief Diversity Officer in budget meetings to collaborate on strategies for embedding EDI inside overall and unit budgets. While major EDI initiatives receive central funding, the inclusion of EDI in each budget helps units and departments to coordinate their own efforts without concern about broader budgeting constraints.

BUILD A COMPELLING BUSINESS CASE.

Utilise the intent of your company's leadership and the articulated strategic relevance of EDI to your organisation to write a compelling business case. Help your company's finance team see the organisation's EDI journey as a source of value rather than a cost, to unlock internal financing. Detail the expected benefits to your business of the proposed investments in EDI, such as improved productivity and worker health and wellness, and reduced absenteeism. Illustrate the potential cost of inaction or possible risks to the business, such as recruitment and retention challenges or litigation risk. Where possible, consider quantifying expected cost savings or avoided expenses to illustrate the scale of the business issue.

EXAMPLE: Diversity and Innovation at Accenture

[Accenture](#) links their work to advance EDI to the company's key business purpose and innovation agenda to drive what the organisation refers to as "[360 value](#)." Accenture considers and explicitly identifies EDI as a central part of what enables the company to attract and develop top talent to create the environment where people can perform their best and drive innovation for the company's overarching goals.

2.4 Allocate Resources

[How to prepare a sustainability budget in 2023](#) [↗](#)

This article from Plan A explains how businesses can allocate budget towards sustainability with limited resources and includes tips for convincing leadership to allocate budget to sustainability.

[How to Spend Your D&I Budget](#) [↗](#)

This article from Diversio highlights best practices for DEI budgeting and spending.

[How to Talk to Your CFO about Sustainability](#) [↗](#)

This article offers a tool for measuring the financial returns on your ESG activities – a method that you can extend to EDI initiatives within your organisation.

[The ROI of Inclusion: How to Align Diversity, Equity, and Inclusion and Business Results](#) [↗](#)

This report by The Conference Board discusses how organisations can leverage the Return on Investment of their EDI efforts to align with business results your organisation wants to see. It also includes a ROI of Inclusion Toolkit to apply the ROI Institutes methodology to your EDI initiatives.

[Return on Sustainability Investment \(ROSI\) Methodology](#) [↗](#)

This resource list offers a links to step-by-step overviews, tools, and other resources to help you assess the value created by your sustainability strategies.

[If You Really Care About Equity and Inclusion, Stop Cutting Your Diversity Budget](#) [↗](#)

This article from Forbes explains why it's important to allocate an adequate budget for your corporate DEI efforts.

[Why Your Organisation Needs a DEI Budget](#) [↗](#)

This blog provides insights on the importance of having an EDI budget to drive outcomes and offers tips on how to create effective EDI budgets.

[IFC's Gender and Infrastructure Toolkit](#) [↗](#)

This toolkit provides business cases for gender in various sectors, including data and specific case studies to highlight how gender inclusive approaches to operations can impact and improve business performance. Sectors currently include water, mining, energy, transport, and cities, and is growing to include plastics in the future.

[The Business Case for Diversity, Equity, and Inclusion](#) [↗](#)

This article outlines the reasoning of why EDI is an essential component of business success and it's contributions to innovative workplaces.

Making the Case for Diversity Equity and Inclusion [↗](#)

This toolkit by the Canadian Centre for Diversity and Inclusion offers insights and guidance on how to develop a case for EDI that goes beyond considerations for ROI.

Diversity Wins: How Inclusion Matters [↗](#)

This report by McKinsey & Company offers insights that connect diversity to company performance, building off various case studies to showcase how the business case for EDI is stronger than ever.

2.5 Take a Public Position

DESCRIPTION

There is growing pressure on companies to take a public position on sustainability issues of relevance to their organisation, EDI included. A strong statement makes a clear connection between EDI and its implications for business strategy and decision-making. Position statements can be an effective catalyst for moving your sustainability agenda forward. The process of developing a public position on EDI can often be as valuable as the output itself. Done well, a position statement on EDI can promote productive debate, clarify expectations, provide direction, and establish accountability.

The following actions can help your company to develop a credible position on EDI:

- *Co-develop a position statement on EDI.*
- *Publish a public position on EDI.*

CO-DEVELOP A POSITION STATEMENT ON EDI.

Building on leadership EDI aspirations and the strategic relevance of EDI, create a written position on EDI or on core EDI issues relevant to your organisation. It may be tempting to assign this work to your company's communications function, but it is often beneficial to engage your company's leadership to craft this position. Bring leaders together to clarify how your company defines EDI and review the strategic relevance of EDI to the business. Encourage them to discuss the drivers of your company's EDI efforts, where your company has adverse impacts or EDI challenges, and how EDI or insufficient EDI efforts could affect your organisation. Developing this into a position statement is typically an iterative process. A good EDI position statement acknowledges EDI's relevance to your company, such as by acknowledging the core challenges at your company. It links this information to company strategy, and it clarifies the company's commitment to take action. Co-developing a position helps to ensure leadership is aligned and helps employees across your organisation to understand where they can contribute and feel empowered to do so.

PUBLISH A PUBLIC POSITION ON EDI.

Once you have co-developed the core elements of your company's position, create a public-facing document that captures the core content of a meaningful public position, as described in [Developing Position Statements](#). A robust and comprehensive public position helps your company to not only provide direction to its employees, but also offers relevant information that helps your internal and external stakeholders assess and engage with your understanding and approach to EDI. This enables them to provide meaningful feedback that can help your company to more deeply understand the issues and their stakeholders' concerns, and refine its EDI approach.

EXAMPLE: Aritzia's Public Position on EDI.

Fashion retailer Aritzia has taken a public position on EDI. In [its statement](#), the company explains it believes that authenticity is critical to change and clarifies its ambition as cultivating "spaces and experiences that promote equity, celebrate diversity and champion inclusion." Aritzia highlights the company progress to date, including establishing an EDI department, implementing education and Inclusive Leadership training, establishing guiding principles for marketing, expanding its product offerings, and establishing resource groups for employees.

2.5 Take a Public Position

Position Database [↗](#)

To help companies develop strong, clear positions, the Embedding Project maintains a public database containing leading position statements articulated by large companies globally. It includes over 300 examples of leading position and is updated monthly.

Developing Position Statements on Sustainability Issues [↗](#)

Drawing upon in-depth analyses of over 4,000 board position statements and over 200 interviews with CEOs, directors, and board chairs, this guidebook from the Embedding Project provides a checklist for crafting a contextual board position statement and includes examples from a range of industries and global settings.

Are Corporate Position Statements on Sustainability Worth the Time and Effort? [↗](#)

This blog article from the Embedding Project explains why position statements matter and how they can be an effective catalyst to moving your sustainability agenda forward.

As Big Corporations Say 'Black Lives Matter', Their Track Records Raise Scepticism [↗](#)

This article highlights various cases from corporate America that fail to follow through in meaningful ways on their EDI commitments, ranging from diversifying their senior executives or addressing discrimination within their organisational structures. It offers an interesting way to understand what marginalised groups expect from your organisation on a social level during key moments of change.

3

EMBED ACROSS EMPLOYEE LIFECYCLE

3.1 Recruit and Select

3.2 Onboard and Offboard

3.3 Compensate Fairly

3.4 Manage Talent

3.5 Invest in People

3.6 Support Needs

3.1 Recruit and Select

DESCRIPTION

Incorporating and prioritising EDI in your company's recruitment and selection process is a critical component of building a more diverse workforce and equitable workplace that is broadly representative across all levels and functions. To attract diverse talent, create a recruitment strategy that eliminates barriers to entry or participation and that treats all individuals equitably and fairly. Support candidates' continued involvement throughout the recruitment process. And proactively design your selection processes with equitable outcomes in mind.

The following actions can help to ensure inclusive and equitable recruitment and selection processes for a more diverse candidate pool:

- *Work to broaden your pool of applicants.*
- *Ensure inclusion in your selection process.*

WORK TO BROADEN YOUR POOL OF APPLICANTS.

To attract a diverse applicant pool, first understand and address systemic barriers to participation. Promote opportunities through diverse channels to ensure they reach diverse communities. In postings, highlight skills and competencies over a narrow focus on experience or education. Limit the expected skills and qualifications in postings to only what is needed to succeed in the role. Clearly disclose all relevant job information, use inclusive language, avoid terms that may dissuade certain groups, and include a meaningful commitment-to-equity statement on your postings.

Second, explore possible conscious and unconscious human biases and algorithmic technology biases that prevent meaningful inclusion. Address human bias through education and training. Proactively consider a culture-add instead of screening for anticipated culture-fit. Partnering with organisations to train and recruit students or creating programs for diverse hiring can increase applicant diversity. And improving your company's reputation, public communications, and EDI track record can also help to attract a more diverse applicant pool, including candidates from underrepresented groups.

EXAMPLE: Microsoft Neurodiversity Hiring Program

Microsoft's [Neurodiversity Hiring program](#) provides training and support needed for the career growth of neurodiverse candidates. Applicants engage in an extended interview process that focuses on workability, interview preparation, and skill assessment to give candidates the opportunity to showcase their unique skillsets.

EXAMPLE: Future Leaders@CLX Program

Clorox established a [recruitment program](#) that targets entry-level, diverse talent. Participants commit to a three-year development program while still in school that builds in various internships and co-ops throughout their time. Students get real-world experience that helps to build their career prospects, as well as an opportunity to get a full-time position at Clorox after graduation.

ENSURE INCLUSION IN YOUR SELECTION PROCESS.

To create an inclusive and equitable selection process, ensure interview panels are diverse and equipped for fair hiring practices and cultural competency skills. Consider the timing and timeline of hiring processes: cultural accommodations may be required to ensure continued participation of candidates from certain groups. And offer compensation for interviews and for any sample tasks required during selection process to ensure applicants with financial barriers can remain involved. Mitigate unconscious bias in selection, including by anonymising applicants at the start of the hiring process and setting standardised and consistent criteria for reviewing and evaluating candidates. Ask the same interview questions and focus on job competency skills to understand performance qualifications. Conduct regular reviews of the company's recruitment process, the diversity of the candidate pool, and the diversity of hires, and adjust company processes as needed.

EXAMPLE: Evening and Weekends Consulting Application Accommodations

Understanding that interviews are often taxing on applicant's time and labour, Evening and Weekends Consulting [compensates candidates](#) with a fixed rate of \$100 per interview and provides questions prior to interview for preparation.

3.1 Recruit and Select

[A Best Practices Guide for Recruitment, Hiring, and Retention](#)

This guide by the Tri-agency Institutional Programs Secretariat offers equity, diversity, and inclusion best practices within recruitment, hiring, and retention to consider within your processes. Though designed for research environments, this guide equally applies to corporate settings.

[Equity, Diversity and Inclusion in Recruitment, Hiring and Retention](#)

This factsheet provides guidance for hiring managers to diversify their recruitment and hiring processes. While focused on the sustainability sector, the insights are applicable beyond this scope.

[7 Practical Ways to Reduce Bias in Your Hiring Process](#)

This article outlines active steps and strategies your organisation can use to begin reducing unconscious bias from your hiring practices.

[The Subtle Way Cultural Bias Affects Job Interviews](#)

This article summarises research on how different cultures valuing different emotions in their candidates can result in bias. It also discusses the problem with focusing “culture-fit” within your hiring processes.

[Autism @ Work Playbook](#)

This playbook offers guidance on supporting neurodiverse talent and creating meaningful employment opportunities, including how to build the business case for hiring neurodiverse talent, considerations for recruitment and onboarding, and examples of leading practices.

[Pronouns.org – Resources of Personal Pronouns](#)

Pronouns.org is a practical resource dedicated to the empowering and inclusive use of personal pronouns in the English language. This website will help you understand why and how to use the pronouns someone goes by.

[A Short\(ish\) Guide to Pronouns and Honorifics](#)

This article explains the importance of pronouns and provides guidance on how to engage in asking about pronouns, unpacking your assumptions, honorifics, and what to do if you make a mistake.

[Unconscious Bias in Recruitment: How Can You Remove It?](#)

This article breaks down how unconscious bias can manifest in recruitment and how work to remove it from the hiring process.

[Hiring Justice-Involved Talent: Practical Steps to Becoming Second Chance Employers](#)

This report by the Responsible Business Initiative for Justice outlines key research on justice-involved talent and builds a roadmap to help companies interested in becoming second chance employers.

3.2 Onboard and Offboard

DESCRIPTION

Onboarding sets the tone for a new employee's workplace experience. Implement inclusive onboarding processes to orient new employee, make them feel welcome, and equip them for success at your organisation. Ensure that employees returning to your organisation have the support they need for effective reintegration. And design and implement an offboarding process that gives exiting employees the chance to share concerns and feedback, which can offer actionable insights on workplace experience, your company's EDI performance, and where purposeful changes may be required.

Your company can leverage these onboarding and off-boarding practices to create a more diverse, inclusive, and equitable workplace:

- *Implement inclusive onboarding processes.*
- *Offer post-leave reintegration support.*
- *Address EDI in exit and stay interviews.*

IMPLEMENT INCLUSIVE ONBOARDING PROCESSES.

Utilise inclusive onboarding processes to ensure that new employees are properly oriented in your company and their new role, especially those from underrepresented groups. Give space and time to absorb new information, expectations, and culture and personalise the onboarding materials where possible. Provide further support through flexibility in integration, regular touch points in the first weeks or months, and upskilling and mentorship for new employees who need it. Also ensure that new employees know what's expected from them in fostering an inclusive respectful workplace: equip them with the skills to do so and consider making inclusion training a core step of your onboarding process. Share your company's commitments to EDI and key initiatives, clarify any company-specific language, and outline how employees can get involved. Establish connections through introductions and informal one-on-one meetings. Share key company and external resources for further learning, as well as opportunities for training.

EXAMPLE: Inclusive Onboarding at Vancity

Recognising barriers individuals may face in gaining crucial skills, Vancity credit union understands that it may take employees from marginalised group longer to thrive in their new roles and meet work plans. Vancity found that providing opportunities for upskilling combined with manageable work and performance plans reduce stress and support employee integration into the organisation. Vancity also ensures that performance plans are focused on the performance of both the employee and their line manager. These collaborative work plans assign joint accountability to support the employee to thrive and do their best work and reduces possible power imbalances in the employee-manager relationship that may hamper onboarding success. This inclusive onboarding approach helps Vancity foster retention.¹

¹ Source: interview with representatives of Vancity Credit Union.

OFFER POST-LEAVE REINTEGRATION SUPPORT.

Support employees returning from parental leave, medical leave, or secondments to reintegrate into the workplace and their role to help ensure a successful transition at what can often be a stressful or emotional time. Co-create a return-to-work plan with the returning employee to anticipate and meet their unique needs and clearly communicate expectations. Provide reasonable accommodations such as flexible working models and a gradual return of responsibilities. Where relevant, build connections, including mentorship support, with others who have navigated a similar reintegration. Create check-in mechanisms to determine how the reintegration is progressing and communicate openly about concerns, support, and feedback.

EXAMPLE: Schindler's Women Back to Business Programme

Elevator and escalator technology firm Schindler established its [Women Back to Business Programme](#) specifically to support women who have taken career breaks and are facing obstacles in re-entering the workforce. The first six-months of the program involve flexible or part-time upskilling and shadowing with no performance targets, followed by more structured roles, objectives, and bonuses as program members secure permanent positions.

their (proposed) departure. Use qualitative and quantitative measures to understand a broader range of experiences. Open-ended prompts can provide an opportunity to gain individual perceptions of your company and where you may be falling short (or succeeding). Commit to using new insights (or validations) to guide your company's EDI efforts and take action to address specific issues that are highlighted.

EXAMPLE: CBRE Exit and Stay Interviews

In 2021, CBRE piloted an [exit interview program](#) that focuses on better understanding why certain groups may be leaving the company. Questions centred on understanding employee experiences that prevented or could prevent their retention at the company, particularly among communities that are underrepresented in the industry. The company is also piloting a "stay interview" program with proactive questions to understand current successes and barriers before the employees consider leaving the company to increase retention from underrepresented groups.

ADDRESS EDI IN EXIT AND STAY INTERVIEWS.

Off-boarding can be a valuable learning opportunity to gain honest feedback that employees may have been hesitant to share before. Stay interviews, typically conducted to understand the contributing factors to an employee's desired departure and prevent it, can equally provide key insights. Incorporate workplace culture and EDI questions in interviews to learn how your company's workplace culture and processes are perceived and experienced by departing employees (whether voluntary or involuntary), particularly those from underrepresented groups. Explore, too, if your company's EDI performance contributed to

3.2 Onboard and Offboard

Inclusion Starts on Day One: 10 Ways to Build an Inclusive Onboarding Experience [↗](#)

This article breaks down different ways to alter your onboarding processes to enhance inclusivity and from the beginning on an employee's time at your organisation.

The Key to Equity is Employee Onboarding: Here's How [↗](#)

This article outlines how onboarding is critical in fostering inclusivity and offers principles and examples on how to adapt onboarding to help new hires succeed.

Reinventing Employee Onboarding [↗](#)

This study discusses a new approach to onboarding that engages employees' strengths and weaknesses to empower them.

Advancing Recruiting's Value Through Uncertain Times: Shaping the Workforce [↗](#)

This research by Garter explains how recruiting and onboarding strategies should shift from focusing on 'replacing' the workforce to 'shaping' talent.

How To Successfully Reintegrate a Returning Worker from Disability Leave [↗](#)

This article outlines nine things to consider and avoid during reintegration processes.

Ask This Powerful Exit Interview DEI Question [↗](#)

This LinkedIn article offers a quick example of an EDI focused exit interview question that could support your understating of employee experiences within your company.

3.3 Compensate Fairly

DESCRIPTION

Fair compensation plays a pivotal role in fostering an equitable workplace that values all employees and treats them fairly. Review wage gaps and possible excess compensation. Use this information to ensure your company achieves pay equity for all employees and pays, at minimum, a living wage. Design initiatives that fill systemic gaps within your broader compensation structures, particularly the health and wellness benefits for underserved groups.

You can enhance fairness in your compensation process through the following actions:

- *Ensure pay equity across your company.*
- *Pay a living wage.*
- *Work to reduce wage gaps.*
- *Offer equitable benefits to all employees.*

ENSURE PAY EQUITY ACROSS YOUR COMPANY.

Your company's employees each have the right to be compensated based on job-related factors for equal or comparable work, including their skills, experience, and effort. Unfair compensation can often lead to retention issues. Consider conducting a pay equity audit and compare compensation between counterparts to understand potential gaps in fair compensation at your company. Ensure pay equity is a key component of your HR and annual compensation processes and consider not only salary or wages, but the employee's full compensation and benefits package, including time off. When determining starting pay, avoid considering a candidate's previous compensation, as relying on earning history disproportionately affects underrepresented groups and can often carry over inequities from other organisations. Instead, create and use a standard skills evaluation to determine salary to ensure employee compensation is based on job-related requirements and performance.

EXAMPLE: Salesforce's Equal Pay Strategy

At Salesforce, employees are grouped into comparable roles and an equal pay assessment is used to identify systemic or unexplained disparities in compensation. The analysis covers disparities across gender in the company's

global operations and goes further within the U.S. to also assess gaps based on race and ethnicity. Adjustments are made based on the insights revealed by the assessment to reduce pay disparities within the organisation. This assessment complements other initiatives that expand equitable benefit packages to ensure all employees can meet their needs.

PAY A LIVING WAGE.

Your company's employees also have the right to a level of compensation that enables them to create a decent living for themselves and their family. Pay a family living wage to ensure that your company's employees can afford the cost living in the region or city where your company operates. For many areas, a formal living wage is calculated annually. Examine how this may change based on an employee's needs or across operating jurisdictions and adopt a consistent, fair, and transparent approach. For employees or contractors who are not paid a salary, ensure that they are paid a living income. Consider paying a thriving wage to ensure employees and their families are not only able to meet their basic needs, but also have disposable income for hobbies, travel, family, as well as savings.

EXAMPLE: A Thriving Wage at MegaFood Canada

Vitamin and supplement company MegaFood's commitment to a thriving workforce focuses on fair treatment of all employees and fair compensation. The company initially reviewed its compensation structures through a living wage lens, but realised this did not necessarily enable employees to afford to pay for childcare, continued education, healthcare, or buy a home and save for the future. The company secured executive team approvals with a strong business case and now pays employees a so-called [thriving wage](#) of at least 25% above a living wage.

WORK TO REDUCE WAGE GAPS.

A wage or pay gaps captures the difference in median or mean earnings between two groups (not two individuals, as with pay equity). Use pay gap audits to identify pay discrepancies between various relevant groups in your company and ensure your company mitigates compensation biases related to gender/gender identity, race, ethnicity, age, sexual orientation, or other areas of potential discrimination. Disclose where pay gaps exist to ensure transparency and to demonstrate progress in addressing them. Consider how your organisation's compensation structure progresses and ensure that compensation for bottom quartile earners in your organisation rises more quickly than compensation for top quartile earners to close gaps. Understand who is represented within each level of your organisation and address instances where occupations are not paid according to value due to persistent structural inequities.

Addressing fear and loss

The practice [Address Fear and Loss](#) covers how your company can tackle feelings of loss that may arise in response to efforts to foster pay equity and reduce pay gaps.

EXAMPLE: Pay Transparency at YLaw

At YLaw, all law firm associates and partners disclose their pay within the workplace for transparency, accountability, and reducing wage gaps between groups. There is a [pay uniformity policy](#) to fairly compensate associates for equal work for as long as their targets are met.

OFFER EQUITABLE BENEFITS TO ALL EMPLOYEES.

Ensure that your benefits program provides all employees with the opportunity to support their health and wellness in ways that match their needs. Ensure benefits are sufficient to help employees meet their basic physical and mental health needs and support wellness. Consider offering mental healthcare coverage separate from physical healthcare coverage to avoid forcing a choice between them. Review usage of benefits to identify and address barriers to accessing, understanding, or using your benefits program. Understand the various needs for different groups and ensure your company's benefits program covers specialised healthcare benefits and wellness support for employees who need it and can be accessed through culturally competent, safe, and inclusive providers.

EXAMPLE: Total Rewards at ThermoFisher Scientific

ThermoFisher Scientific offers a [comprehensive total rewards package](#) that works to meet the diverse needs of all employees. The company offers cover a range of benefits and programs for physical, emotional, financial, and social wellness. The program is regularly evaluated and measured against benchmarks to identify if the services are matching employee needs.

3.3 Compensate Fairly

[Global Living Wage Coalition](#)

The Global Living Wage Coalition is a partnership between Anker Living Wage and GLWC Action network that provides an explanation of the Anker methodology for measuring a living wage and case studies for implementation insights.

[Roadmap on Living Income](#)

This platform by IDH provides guidance on how to take tangible steps towards meeting international living wage standards through a five-step approach.

[A Living Wage Roadmap for Large Employers](#)

This guide from Vancity Credit Union includes details on their 7-step process towards becoming a certified Living Wage Employer, providing key insights and guidance on how to structure and implement the process.

[The Case for Living Wages: How Paying Living Wages Improves Business Performance and Tackles Poverty](#)

This paper from Business Fights Poverty, CISL, and Shift explains the benefits of providing a living wage for employers and includes a five-step approach to take action.

[How to Identify – and Fix- Pay Inequality at Your Company](#)

This article offers guidance on how to pursue pay equity in your organisation, beginning from pay equity audits to monitoring compensation processes.

[Income Alone May Be Insufficient: How Employers Can Help Advance Health Equity in the Workplace](#)

This article discusses how health inequities may persist in your organisation and outlines actions to support health and wellness for all.

[Achieving the Living Wage Ambition: Reference Sheet and Implementation Guidance](#)

The living wage ambition is one of the ten SDG Ambition Benchmarks to ensure decent work and dignity for all. This guide provides details on steps to take to implement a living wage programme in your organisation.

[A New Approach to Employee Benefits](#)

This report explains considerations to guide your approach to adapt and embed EDI within your benefits offerings.

[Closing the Wage Gap: How These 5 Companies Are Working to Achieve Pay Equity](#)

This article outlines different ways companies are working to ensure pay equity throughout their compensation processes.

[Upholding the Human Right to a Living Wage Is Essential for Business](#)

This blog article by the Embedding Project breaks down what constitutes as a living wage and why it is important for your organisation.

3.4 Manage Talent

DESCRIPTION

Ensure that EDI is integrated in your company's talent development and management approach, so that its processes result in workforce diversity across all levels and functions. Integrate EDI in performance evaluation across the company and consider building it into executive compensation structures, to drive a culture shift across your organisation. Personal EDI goals can build awareness and understanding, secure employee and leadership support for company commitments, and incentivises their participation in meeting company goals. Designed well, EDI in talent management can help to promote a culture of inclusion and belonging where diverse talent is represented across all levels.

The following actions can link EDI to talent management throughout your organisation:

- *Encourage employees to set personal EDI goals.*
- *Leverage performance reviews to celebrate EDI efforts and uncover challenges.*
- *Factor EDI into succession planning.*
- *Consider including EDI in executive discretionary compensation.*

ENCOURAGE EMPLOYEES TO SET PERSONAL EDI GOALS.

Enable and empower employees to contribute to your company's EDI efforts as part of their responsibilities by encouraging them to set personal EDI-related goals. This could include professional development related to EDI understanding and competencies, as well as new responsibilities or stretch assignments to cultivate or implement new skills. Suggest or offer guidance to create goals and interim targets that are relevant to an employee's position, competencies, and interests, as well as business needs. Encourage employees to identify their need for support to achieve their personal EDI goals. Provide guidance on key milestones and metrics that can guide employees in designing and mapping their personal EDI goals and ambitions and in determining how to measure their success.

EXAMPLE: Diversity-Related Goals at Miami University

Miami University provides managers with resources and examples on how to [incorporate EDI](#) into employee performance reviews and goal setting, with goals covering aspects such as participating in cultural competency development courses, contributing to mentorship of diverse talent, participating in EDI committee, and supporting EDI programming.

LEVERAGE PERFORMANCE REVIEWS TO CELEBRATE EDI EFFORTS AND UNCOVER CHALLENGES.

Your company's performance management approach can set the tone and demonstrate support your company's vision for EDI. Recognise and reward employees who are engaged in company EDI efforts in annual performance reviews. Set clear and objective measures to assessing contributions to the company's workplace culture and its strategy and goals. Account for participation in training on key EDI topics or in EDI groups and initiatives in rewards systems to reinforce the importance of fostering a company culture of inclusion and belonging. Where appropriate, also use reviews to uncover potential EDI challenges that may affect an employee's performance and solicit feedback on their workplace experience. Commit to and take action to address challenges that emerge.

EXAMPLE: Talent Reviews at Sonoco

To support its efforts to build a diverse and inclusive workplace, [Sonoco](#) adjusted its annual performance reviews to include standardised metrics and equity-focused questions. This included questions that address what managers are doing to develop diverse talent within their teams and to address concerns that their team members may raise.

FACTOR EDI INTO SUCCESSION PLANNING.

Embedding EDI into succession planning efforts can help to ensure your company has a broadly diverse pool of candidates to adopt future leadership roles. This, in turn, can help to improve diversity in leadership and better labour force representation across all levels and functions of your company. Develop and offer professional development and mentoring or coaching opportunities to ensure that high-potential employees from underrepresented groups are ready for leadership opportunities. Ensure that all employees are encouraged to consider advancement opportunities, are familiar with your company's succession planning program, and can signal their interest. Mitigate bias and preference for leadership homogeneity. Instead, look towards individuals that embody organisational values and consider a broad range of successors who meet the job criteria and have the competencies to adopt a leadership role in your company.

Investing In Diverse Talent

The practice [Invest in People](#) covers practices your company can take to invest in professional development for underrepresented groups within your organisation.

EXAMPLE: The role of succession planning in developing diverse talent at Rosendin Electric

Understanding the historic limitations that make a career in the construction industry less accessible to underrepresented groups, Rosendin Electric developed a [Leadership Academy](#) that offers a robust program to support skill building and uplift diverse talent in its senior leadership pipeline. While originally the program nominated participants based on previous experience, it evolved to include a self-nomination process to provide a more equitable opportunity for involvement by all.

EXAMPLE: Advancing Diverse Leadership at ADP

Recognising that its senior leadership did not represent its broader workforce, human capital management firm [ADP](#) established 3-year diversity goals to improve representation across its executive leadership team and created a "Cultivate Your Career" program to focus on advancing women of colour within the organisation. The company also sponsors quarterly development programs for women and offers a Multicultural Leadership Development Program, a one-year seminar on key leadership topics, for high-potential employees.

CONSIDER INCLUDING EDI IN EXECUTIVE DISCRETIONARY COMPENSATION.

Including EDI criteria in your company's discretionary compensation program for executives can be a meaningful way to signal the importance of the company's EDI efforts. Provided executive EDI incentives are well designed, they can be a valuable driver for executive commitment and for EDI improvements across the organisation. Design discretionary compensation targets to foster meaningful and quantifiable progress on company EDI ambitions or a fundamental shift in behaviour rather than rewarding compliance with existing company expectations: this helps to avoid EDI incentives simply becoming a guaranteed increase in executive pay. Link executive EDI incentives to your company's EDI objectives and use existing, ideally quantitative, key EDI measures to assess performance and progress.

3.4 Manage Talent

Is It Time to Integrate EESG Into Executive Compensation? [↗](#)

This article outlines key takeaways from a Salzburg Global Governance Forum on integrating EESG into executive compensation.

Looking Beyond the Horizon: How CIOs Can Embed DEI Into Succession Planning [↗](#)

This article discusses EDI and its importance in creating a diverse slate of talent for effective succession planning, particularly within the technology sector.

Embedding D&I Into Succession Management [↗](#)

This report highlights key solutions to address EDI within succession management.

Recognising and Rewarding the Work of Employee Resource Groups [↗](#)

This article emphasises the importance of recognising EDI work from employees in formal structures, particularly in the case of Employee Resource Groups. It addresses why this recognition is particularly important work focusing on belonging and the need to understand ERG time as work time.

How to Elevate Diversity, Equity, and Inclusion Work in Your Organisation [↗](#)

This article provides a framework for rewarding and uplifting EDI work within your organisation.

Create Learning Pathways to Close Your Organisation's Skills Gap [↗](#)

This article offers an understanding of learning pathways to ensure your workforce develops the skills and competencies that your organisation needs to succeed.

Engaging Today's Workforce: The Importance of Employee Career Pathing [↗](#)

This article offers guidance on early steps to take towards building employee career pathing to create an internal talent pipeline.

Outsmarting our Brains: Overcoming Hidden Biases to harness Diversity's True Potential [↗](#)

This guide from Ernst & Young and the Royal Bank of Canada explores hidden biases in the workplace and touches on how to identify biases within promoting processes in your organisation. It includes simple questions, tips, and actions for correcting these processes to support diverse talent pipelines.

How to Tie Executive Compensation to Sustainability [↗](#)

This short article outlines how to better connect executive compensation with sustainability-related achievements. The insights can also be extended to your organisations EDI related goals and aspirations.

Moving Cautiously on ESG incentives in Compensation [↗](#)

This resource from Semlar Brossey highlights common questions and key steps when linking ESG metrics to executive compensation.

3.5 Invest in People

DESCRIPTION

Intentional investment in people can drive change through training, opportunities, and connections that enhance employees' workplace experiences, their capacity to enact change, and their ability to advance in your organisation. Invest in your company's workforce to cultivate crucial knowledge and competencies that teams and individuals need to help your company achieve its EDI ambitions. Invest in equipping employees of underrepresented groups with the resources to reach equal footing with others and close opportunity gaps between groups.

You can focus your efforts through the following actions:

- *Provide EDI resources and training for all employees.*
- *Invest in professional development for underrepresented groups.*
- *Integrate EDI competencies into your leadership training.*
- *Create coaching, mentorship, and sponsorship programs.*

PROVIDE EDI RESOURCES AND TRAINING FOR ALL EMPLOYEES.

Based on your organisation's challenges and guided by core EDI themes, design a robust EDI training system that enables both learning and unlearning, as needed. Ensure EDI resources and training are available in a range of modalities and formats to suit learners' different needs and enable them to progress at their own pace. Encourage employees to take ownership of their own learning journeys and support self-learning by helping employees identify their own learning needs, set learning goals, curate learning content, and evaluate their progress. Provide formal – and possibly mandatory – training on EDI topics crucial to your organisation's EDI journey, such as cultural awareness, unconscious bias, allyship, bystander intervention, and change management training, to encourage understanding of diverse perspectives, help employees challenge preconceived notions, and equip them to take meaningful action. It is important for such training to take place within a constellation of EDI efforts, and not as a sole intervention, to ensure learnings can lead to meaningful action. Reinforce training through structural changes, commitments, and modelled behaviour to embed new practices into the company's culture.

Leading by Example

The practice [Demonstrate](#) covers actions your company can take to proactively demonstrate and model fair and inclusive behaviours across the organisation.

EXAMPLE: Rio Tinto's Cultural Awareness Training Program

The [Cultural Connection](#) program at Rio Tinto aims to foster cultural competency and ensure that the company's senior leadership can navigate the nuances of the different cultures they operate within. It provides an opportunity to learn about the histories, traditions, and cultures of Indigenous Peoples and how to build strong and respectful relationships with Indigenous communities and employees. The company also launched a digital cultural onboarding platform to support cultural safety, as well as a virtual reality cultural awareness training process for its Iron Ore business and a regionally specific and Traditional Owner-led training program for operations across Australia.

INVEST IN PROFESSIONAL DEVELOPMENT FOR UNDERREPRESENTED GROUPS.

Providing a range of professional development opportunities can empower employees to develop new skills and ensures that employees, regardless of their background, have equal access to advancement within your organisation. This can include paying for training programs and offering financial assistance in the form of subsidies or reimbursement for employees pursuing continued education. Prioritising the development of underrepresented groups within your organisation can help address opportunity gaps due to inaccessible knowledge by providing individuals with the support they need for upskilling and building capabilities.

EXAMPLE: Fidelity Canada Employee Development Initiatives

[Fidelity Canada](#) encourages consistent employee education by offering tuition subsidies and financial bonuses for course completion ranging from CAD \$300 to \$2,000. The organisation also has job exchange and secondment programs in place to let employees experience different roles for up to one year to broaden their skillsets.

INTEGRATE EDI COMPETENCIES INTO YOUR LEADERSHIP TRAINING.

Equip people managers across all levels of your company with the EDI knowledge, skills, and competencies they need to effectively lead diverse teams. Managers are a key factor in a worker's experience, sense of inclusion and belonging, and their perceived psychological safety in the workplace. Integrate training that builds critical personal, interpersonal, and strategic skills alongside foundational knowledge on organisational EDI. Enable people managers to cultivate the awareness required to critically assess your company's workplace culture. Encourage managers to identify and raise challenges with their leader, but also empower them to take action with their role and responsibilities to implement your company's shift towards inclusivity. Consider making EDI-competencies a formal requirement for people manager roles.

EXAMPLE: Supporting Managers to Lead Inclusively at Intuit

In 2019, Intuit launched a "[Leading Inclusively @ Intuit](#)" training workshop for all leaders that covers key EDI concepts in a 4-part framework discussing unconscious bias, voice, belonging, and growth mindsets. The program has opened up opportunities for further training for leaders, including training for managers on [building safe environments](#) and [racial equity training](#) for over 1,000 leaders, including the CEO and CEO's staff, to better understand the impacts of structural racism.

CREATE COACHING, MENTORSHIP, AND SPONSORSHIP PROGRAMS.

Leaders often gravitate towards those similar to them, creating disparities in which groups get additional guidance, advice, and opportunities for advancement. Create an ideally formal and structured program for coaching (skills and performance) and mentorship (holistic development) that connects leaders with (typically) more junior employees, especially from underrepresented groups, to support their career advancement. Design program objectives in line with your company's EDI ambitions to address representation gaps and enable career progression for diverse talent and ensure coaches and mentors are trained to be effective cross-cultural or cross-gender supports. Encourage peer mentoring by offering general mentorship competency training and process guidance. Pursuing a similar structure for sponsorship programs (career advancement) can be crucial avenue for underrepresented groups to gain access to opportunities for achieving their professional goals. Ensure your company proactively reframe the role of coaching to eliminate possible stigma and highlight its significance to fostering a diverse, inclusive, and equitable company.

EXAMPLE: Reciprocal Mentorship Program at American Institutes for Research

In 2019, the American Institutes for Research (AIR) launched a [formal mentorship program](#) that aimed to support the development of underrepresented groups within the organisation. It connected senior leaders and staff to establish connections, provide guidance on career development, and uplift their capacity to engage with within leadership at AIR. It was framed as a mutual relationship, where both parties share knowledge, learn, and hold each other accountable.

EXAMPLE: Legal Mentorship Program at Enbridge

In 2021, Enbridge created a [Legal Mentorship Program](#) for Black and Indigenous first-year law students in Ontario. Each mentee was assigned with an Enbridge lawyer and received group mentorship. The program was built to uplift and develop rising talent that are often part of groups systematically targeted and excluded from the profession.

EXAMPLE: The Multiplier Effect at Cisco

Cisco's sponsorship initiative, [The Multiplier Effect](#), fosters the ability of leaders to support the growth and career development of employees from marginalised communities within the organisation. The program aims to connect leaders, partners, and suppliers to African American/Black employees.

3.5 Invest in People

Why Professional Development is the Achilles' Heel of Many DEI Efforts – and 6 Ways to Fix That [↗](#)

This blog article outlines the importance of investing in your workforce to retain and uplift diverse talent beyond recruitment. It further provides six strategies to ensure professional development supports employees from underrepresented groups in meaningful ways.

The Key to Inclusive Leadership [↗](#)

This article highlights key traits for leaders to foster inclusiveness and organisational practices that can help leaders enhance their EDI capabilities.

Five Essential Leadership Competencies of an Effective D&I Practitioner [↗](#)

This guide documents the knowledge, skills, abilities, and other characteristics leaders need to drive inclusive organisational change.

The Key to Diversity and Inclusion is Mentorship [↗](#)

This article in Forbes presents an interview with Dr. Elisee Jospeh that discusses the power of mentorship and how organisations can build effective mentorship programs that enhance their EDI goals.

The Complicated Battle Over Unconscious-Bias Training [↗](#)

This article explains the present conflict with training on EDI concepts such as unconscious bias, providing a pathway to make such trainings more meaningful to support real change.

Practices for Cultivating Capable Champions [↗](#)

This section within Chapter 5 of Focusing on Organisational Change provides you with seven practices to cultivate capable change agents within your organisation.

3.6 Support Needs

DESCRIPTION

Each person's identity consists of multiple intersecting and overlapping characteristics, including race, gender, age, class, ability, culture, and other factors, which shape that person's experiences and needs, including at work. Acknowledge and address these divergent needs to foster an inclusive workplace culture. There is no one-size-fits-all approach. Instead seek input to understand the different forms of support that your company's employees require and consider if your company's current offerings are inclusive of the different backgrounds, cultures, and abilities present in your organisation. Supporting workforce needs supports retention, demonstrates your company's commitment to fostering employee wellness, and can help foster inclusion and belonging.

The following actions can help your company to meet employee needs:

- *Support work-life balance.*
- *Support the health and wellness of all employees.*
- *Ensure physical and psychological accessibility.*
- *Support employees facing adversity or hardship.*

SUPPORT WORK-LIFE BALANCE.

Cultivating a healthy work-life balance can support employee wellness and productivity and avoid burnout and absenteeism. Based on employee input, providing flexible working models such as compressed work weeks, telecommuting, hybrid or remote work options, work-from-anywhere agreements, or letting employees set their own schedules. Offer adequate vacation time and reasonable working hours to support their ability to meet responsibilities and needs outside of the workplace. Provide unlimited sick days (even if some are unpaid) to enable employees to take the time they need to recover and come back to work healthy. Offer paid leave for child and elder care responsibilities and personal days that employees can use for health and wellness time and appointments, as needed. Assess if your parental leave program is gender inclusive and encompasses adoptive parents. And consider offering parental top-ups and benefits when coming back to work such as on-site childcare, which can alleviate stress and help new parents balance their family responsibilities.

EXAMPLE: 3M's "Work Your Way" Program

3M's "[Work Your Way](#)" program enables employees to create a customised work routine that meets their individual needs on any given day. The trust-based work model allows employees to choose between working remotely, onsite, or hybrid, to balance personal responsibilities with work requirements in ways that work for them.

EXAMPLE: iQmetrix's Parental Leave Program

[iQmetrix](#) offers new mothers with 51 weeks of company paid time off and 34 weeks for partners and adoptive parents. Their parental top-up policy was set at 90 percent, providing parents with more financial stability. The company also provides an additional 10 extra paid days off to new parents taken in the form of additional weeks of vacation.

EXAMPLE: Parental support at Maersk

International shipping giant [Maersk](#) offers onshore employees returning to work after parental or adoption leave the opportunity to work 20% fewer hours at full pay for up to six months after returning to work.

SUPPORT THE HEALTH AND WELLNESS OF ALL EMPLOYEES.

Offering robust health and wellness programs can create support systems that foster employee physical, mental, and emotional health and wellness. Opportunities you offer should be personalised and flexible to your organisational and employee needs – for example, consider micro-breaks throughout the workday to encourage employees to prioritise mental health or offer access to onsite recreation facilities that can help employees engage in physical activity. Beyond physical and mental health benefits programs (covered in [Compensate Fairly](#)), provide access to primary care, offer vaccinations and health clinics, and relevant health and wellness seminars, and ensure employees have access to nutritious and culturally appropriate food in the workplace where applicable.

EXAMPLE: Toyota Motor Manufacturing Canada (TMMC) Recreation Facilities

TMMC offers a range on [onsite amenities](#) for employees to access and spend time pursuing what they enjoy. These amenities include a free membership to a fully equipped on-site fitness facility, a games room, a quiet area for meditation and religious observances, outdoor trails and sports fields, and community gardens.

ENSURE PHYSICAL AND PSYCHOLOGICAL ACCESSIBILITY.

Consider and invite input on how the external and internal surroundings, signage, and design of your company space can hinder physical accessibility. Consider, and also invite input on, your company's psychological accessibility, as workplace practices, behaviours and systems, including technology, can also create significant barriers for employment for people with disabilities. Work towards an inclusive workplace culture by encouraging dialogue, providing resources, and training on accessibility and how address accessibility challenges, in particular for people managers. Include accessibility-focused information in orientation, communicate any accommodations you currently offer, and encourage employees to proactively identify their needs. Support modified access to workplace technology as required and usability of job-relevant digital products. Provide disability support and accommodate flexible or alternate work-day structures to enable meaningful inclusion.

EXAMPLE: Disability Inclusion at Alaska Airlines

[Alaska Airlines](#) was included in the 2023 Best Place to Work for Disability Inclusion by the Disability Equality Index. The company has recently revamped its hiring portal with accessibility updates and established a Disability Office that guides relationships, advocacy, and consultations on accessibility. In collaboration with Open Doors Organisation, Alaska Airlines also created an 'Accessible Facilities Playbook' that will guide universal design for their built environment to increase physical accessibility. Furthermore, a percentage allocation of procurement is used on businesses owned, controlled, operated, and managed by persons with disabilities as part of Alaska Airlines Supplier Diversity Program.

SUPPORT EMPLOYEES FACING ADVERSITY OR HARDSHIP.

Employees may face mental health challenges or issues in their personal lives that can appear in the workplace, and such struggles are not always easily distinguishable from illness. Listen first and encourage employees facing such challenges to access other supports such as professional help. When encountering trauma or grief, lead and engage with compassion and cultivate an environment where workers can express grief rather than suppress it. Work with experts to design supports relevant to challenges encountered in your company's workplace. For example, to support employees experiencing domestic or family violence, work with experts to create formal assistance programs that provide access to resources, confidentiality, and protections from adverse actions on disclosure.

EXAMPLE: Stockland's Domestic and Family Violence Policy

Stockland's formal [Domestic and Family Violence](#) (DFV) policy includes an employee assistance program with access to psychologists and counsellors, unlimited paid leave, confidentiality and protection from discrimination, flexible working arrangements, transfers of office location, and provision of financial supports. The support program also includes DFV first responders that respond to disclosures.

3.6 Support Needs

Healthy Workplaces [↗](#)

This site by the Canadian Cancer Society explains why healthy workplaces should be a priority and provides a roadmap to getting started. It also outlines resources for common workplace wellness challenges that employees may be interested in.

A Practical Toolkit to Help Employers Build an Inclusive Workforce [↗](#)

This toolkit from the Mental Health Commission of Canada provides insights on how to create an inclusive workforce and addressing the needs of workers living with mental illness in your organisation.

The Office Guide to Building Health [↗](#)

This manual offers guidance on how to support the health and wellness needs of your workforce through design and operational approaches.

2023 Disability Equality Index [↗](#)

This report by the Disability Equality Index highlights disability inclusive foundational practices, emerging trends, new imperatives, and pilot programs from nearly 500 companies that can provide insights and guidance for your organisation.

Creating an Accessible and Welcoming Workplace [↗](#)

This article by Employer Assistance and Resource Network on Disability Inclusion offers more information about different elements of accessibility in the workplace.

Making the Web Accessible [↗](#)

This resource by the Web Accessibility Initiative provides strategies and standards to help your organisation foster accessibility for websites, applications, and other digital assets.

How to Support an Employee with Mental Illness [↗](#)

This toolkit by Hire for Talent discusses mental health in the workplace, how to support employees that may be suffering from a mental illness, and tips on how to foster psychological safety when talking about health at work.

Workplace Strategies for Mental Health [↗](#)

This platform provides a broad range of key recourses and tools for supporting workplace mental health and psychological safety within your organisation.

How Companies Can Foster Wellbeing in Remote and Hybrid Workplaces [↗](#)

This article breaks down how the shift to remote work can create feelings of isolation and how companies can support their employees in such roles.

Responding to Violence Against Women: A Guide for Companies [!\[\]\(c140ced51dbf5d4fbee7bbef0b65b56b_img.jpg\)](#)

This guide by CARVE discusses how companies can address violence within the workplace. It includes practices, policies, and insights on how to identify cases for preventing and responding to violence against women.

Handbook: Addressing Violence and Harassment Against Women in the World of Work [!\[\]\(fa0af60b6801543fcbf5ea18bb648edb_img.jpg\)](#)

This handbook created by UN Women provides practical guidelines on implementing measures for building safe spaces for women within organisations. It includes guiding policies, practices, and frameworks that can help build your understanding on addressing violence at work.

Leading in Times of Trauma [!\[\]\(4d2ef660b5f8c43a89686eee800bc7ac_img.jpg\)](#)

This article outlines key considerations and pathways for leaders to take when employees are impacted by traumatic events.

4

EMBED INTO STRUCTURES AND PROCESSES

[4.1 Embed into Risk and Core Strategy](#)

[4.2 Design Effective Policies and Procedures](#)

[4.3 Address Inequities](#)

4.1 Embed into Risk and Core Strategy

DESCRIPTION

Identifying, assessing, mitigating, and managing EDI-related risks *posed by* your company as well as *affecting* your company is part of a robust enterprise risk management cycle. Prioritise areas of key EDI risk and impact, understand how they may affect your company, and integrate them into your company's core strategy. This helps you to integrate crucial EDI considerations into business priorities and decision-making and embed EDI into your company's operations as an integral component of your company's culture.

The following actions can help your company to embed EDI into risk and core strategy:

- *Assess EDI risk as part of your risk process.*
- *Integrate EDI into core strategy and decision-making.*

ASSESS EDI RISK AS PART OF YOUR RISK PROCESS.

As part of your company's regular risk management processes, identify, assess, and manage the risks and opportunities that EDI pose to your company. Review where your company has adverse EDI impacts, where its performance falls short of legal requirements or expected performance, and where EDI issues have the potential to affect your company. Explore legal risk and human rights risk, as well as reputational risk, talent attraction and retention risk, productivity, financial, and other operational risks. Assess what actions are underway and what controls and systems are in place to mitigate and manage risk, and regularly evaluate how well these function. Consider also what business opportunities may be associated with the risks you uncovered. Additionally, when launching new products, services, or initiatives, review their

full scope with an EDI lens, to identify potential elements or omissions that can generate EDI risk or offer opportunities to advance equity, diversity, and inclusion in your organisation.

EXAMPLE: Equity Risk Indicators at Vancity

Vancity credit union includes key equity risk indicators in its organisational risk dashboard to better manage and monitor EDI risk across the organisation. The company identifies discrepancies in the representation of different identity groups between senior management and individual contributors. The aim is to keep representation equitable across all levels of the organisation, aiming at a difference in organisational makeup at each level of no more than 3%.²

² Source: interview with representatives of Vancity Credit Union.

INTEGRATE EDI INTO CORE STRATEGY AND DECISION-MAKING.

Review your company's EDI strategy and identify core EDI elements that help to manage critical business risks and drive long-term business success. Integrate these crucial EDI issues into your company's core strategy, to elevate their profile within your company and to ensure they receive the strategic attention and resources allocation they require. Ensure your company's core strategy is aligned with the EDI strategy that informs it. Creating company-wide procedures and processes that help to embed EDI considerations into business decision-making across all levels of your organisation, including the most senior. Establish tools for critical inspection of how your strategic decisions impact EDI within your organisation. Address bias in current structures and establish processes for equitable inclusion in decision-making, including diverse perspectives from different backgrounds and employee levels where possible.

EXAMPLE: Integrating EDI at Intuit

Intuit recognises the key role EDI plays in the fabric of its organisation, from employees to the communities it serves. The company has [incorporated EDI](#) into its overarching True North Goals, which is a critical part of guiding the company's operations. In 2020, Intuit also established a [Racial Equity Advancement Leadership](#) (REAL) Team that helps to integrate nuanced understandings of Black employee experiences and integrate insights into the company's strategy. The REAL Team has now expanded to include Hispanic/Latinx, Native American, Native Alaskan, Native Hawaiian, and Asian employees to further support greater integration of racialised experiences within strategy and decision-making.

4.1 Embed into Risk and Core Strategy

The Intersection of Risk Management And DEI [↗](#)

This article highlights the importance of integrating EDI into risk management and how the two may collaboratively contribute to driving success within your organisational structure.

Board's Guide to Trust: The ESG Imperative [↗](#)

This report from Edelman and the National Association of Corporate Directors provides checklists and summaries to better understand practices for embedding ESG into strategic decision-making.

5 Strategies to Infuse D&I Into Your Organisation [↗](#)

This article provides insights for transforming your organisation, including the importance of integrating EDI in your business strategy for meaningful impact.

It's (Past) Time to Get Strategic About DEI [↗](#)

This article breaks down five interconnected steps for setting EDI into your integral strategy.

To Drive Diversity Efforts, Don't Tiptoe Around Your Legal Risk [↗](#)

This article breaks down the importance of have a partnership between EDI leaders and legal counsel and presents a framework to balance legal risk within your EDI initiatives.

Boards are Obstructing ESG – At Their Own Peril [↗](#)

This article explains how boards can catch up with key EDI topics through recruitment, learning, and aligning KPIs in business planning.

WBCSD ESG Self-Assessment [↗](#)

This self-assessment tool evaluates the current integration of key ESG competencies and values within board-level decision-making.

Risk Assessment Tool [↗](#)

This tool provides an outline to quickly assess a potential risk for your organisation.

4.2 Design Effective Policies and Procedures

DESCRIPTION

Design clear and robust policies and procedures on EDI topics for your organisation, both to demonstrate your company's commitment and to foster an inclusive and equitable workplace. Clarify your company's position, set expectations, demonstrate leadership support, and provide meaningful guidance for individuals across all levels and functions of your company in its policy and procedure documents. Setting standards provides consistency, gives individuals guidance against missteps, and proactively fosters better EDI performance across your organisation through regular review and revision as needed.

The following actions can improve your organisations policies and procedures:

- *Design concise clear policies on core EDI topics.*
- *Regularly assess policy and procedure effectiveness.*
- *Assess all new company initiatives against EDI vision and intent.*

DESIGN CONCISE CLEAR POLICIES ON CORE EDI TOPICS.

Design policies that concisely and clearly capture your company's rationale for the policies (including the policy topic's relevance to the business), as well as your company's commitments on the issue, and its expectations of employees, executives, and directors. Clarify the scope and parameters of each policy, identifying which topics are covered and if the policy applies to specific segments of your organisations efforts. Integrate a formal written endorsement from the accountable senior executive and detail channels and guidance for how individuals can safely address concerns or report violations. Outline responsibilities and disciplinary actions for non-compliance. Be clear, too, about when the policy was created, what version of the policy is current, and when it is slated for revision. EDI policies can address anti-harassment, anti-discrimination, whistleblower protections, pay equity, flexible work arrangements, paid leave, and other identified areas of focus specific to your organisation. It is good practice to seek input on new policies and procedures from those affected by them.

Seeking Employee Input

The practice [Listen](#) covers how your company can prompt and seek meaningful employee input on your EDI policies to ensure they benefit from relevant and diverse perspectives.

EXAMPLE: Diversity, Equity and Inclusion Policy at Johnson and Johnson

Johnson and Johnson's (J&J) [overarching Diversity, Equity, and Inclusion Policy](#) sets the principles and requirements for various levels within the organisation. The policy links back within the J&J's Global EDI strategy and begins by addressing the purpose of the policy as a contributing factor to the company's EDI vision. The policy outlines broad responsibilities for employees, people leaders, and network members, followed by a clear stance on discrimination, harassment and bullying within the organisation. Pathways to report inappropriate conduct and consequences for non-compliance are also made clear within the policy.

REGULARLY ASSESS POLICY AND PROCEDURE EFFECTIVENESS.

Regularly assessing the effectiveness of your policies and procedures in advancing your EDI goals is necessary to ensure that your efforts remain dynamic and up to date with your organisation's evolving journey. Engage in systematic reviews of the content and impact of key policies, consider employee feedback, and monitor its effectiveness through data analysis where possible. Identify areas of improvement or clarification and update policies to have impacts that better align with your organisational vision and needs.

Monitoring Progress

The practice [Monitor Your Progress](#) covers how your company can assess and monitor the effectiveness of your EDI initiatives and policies.

Seeking Employee Feedback

The practice [Listen](#) covers how your company can prompt and seek meaningful employee feedback to understand the impacts of your EDI policies in order to improve them.

EXAMPLE: Microsoft's Action Plan for Sexual Harassment and Gender Discrimination Policies and Practices

As a part of its commitment to a safe and inclusive work environment, Microsoft conducted an independent review of its sexual harassment and gender discrimination policies. Based on the findings, Microsoft established a clear [action plan](#) that includes an expanded board review of key policies to improve ease of access for employees and a revision of the company's Anti-Harassment/ Anti-Discrimination and Conflicts of Interest policies to include greater language clarity for employee expectations.

ASSESS ALL NEW COMPANY INITIATIVES AGAINST EDI VISION AND INTENT.

As your company designs new initiatives, whether with an EDI focus or not, evaluate them against your overarching EDI vision and intent. Assess if they align with your overarching goals and contribute to meaningful progress in your company's identified focus areas or if they risk hampering them. Consider creating a checklist as well as open-ended questions that can help your company to consistently assess the EDI impacts of new initiatives and provide unbiased recommendations for improvement. Assess if and how an initiative supports your company's EDI intent, aligns with company guiding principles, and drive the intended impact. This enables your company to refine initiatives where needed, to ensure that your organisational effort on EDI remains cohesive and targeted to create impact where it matters most.

Establishing Guiding Principles and Intent

The practice [Set Strategy](#) covers establishing your company's EDI guiding principles, aspirations, and intent which can help in establishing the criteria your company's new initiatives need to meet.

EXAMPLE: Integrating Pronouns into Vancity's New Products

When Vancity Credit Union had designed a new client-facing financial product, the review phase included an assessment by the company's Diversity, Equity, Inclusion, and Reconciliation (DEIR) team, which identified EDI-related improvements small in scope, but potentially significant in impact. This allowed Vancity to catch key issues early, such as the product requiring users to provide a "Given Name" which would adversely impact those going by alternate or self-identified names. Furthermore, by allowing users to select from a range of pronouns and gender identities, the team was able to make the client offering more inclusive and aligned with the company's internal practices.³

³ Source: interview with representatives of Vancity Credit Union.

4.2 Design Effective Policies and Procedures

[A Policy Primer: Guide to Developing Human Rights Policies and Procedures](#)

A Policy Primer: Guide to Developing Human Rights Policies and Procedures

This guide by the Ontario Human Rights Commission includes key aspects to consider when developing human rights policies and procedures.

[Guide to Writing a Code of Conduct](#)

This primer from Project Include explains the purpose, responsibilities, and requirements for an effective code of conduct.

[Model Transgender Employment Policy: Negotiating for Inclusive Workplaces](#)

This document offers sample policies that can help your company welcome and support transgender, gender non-conforming, and transitioning employees. The sample policies include topics such as names/pronouns, transitioning on the job, restroom accessibility, dress codes, and discrimination and harassment.

[Anti-harassment and Anti-discrimination Policies](#)

This resource provides guidance on creating anti-harassment and anti-discrimination policies for your organisation.

[A Guide for Business: How to Develop a Human Rights Policy](#)

This guide from UN Global Compact explains the reasoning behind developing a human rights policy, the development process, and steps for implementation.

[Gender Equality Codes of Conduct Guidance](#)

This guide from BSR provides a framework for establishing codes of conduct that uphold good working conditions, particularly for women in the workplace.

[Equitable Holiday and Paid Time Off Policies and Sample](#)

This resource by the Training Resources for the Environmental Community can support your assessment of your current holiday and paid time off policy and provides a sample policy.

[Standards Map](#)

This database by the International Trade Centre provides information on over 300 standards related to sustainability topics, including workers' rights and business ethics.

[CFA Institute Diversity, Equity, and Inclusion Code \(USA and Canada\)](#)

This implementation guide by the CFA institute provides supportive guidance for signatories to the Diversity, Equity, and Inclusion Code and DEI Code and Reporting Framework. It outlines useful examples and practices for several HR practices and policies, serving as a learning resource for many key EDI policies and procedures within your organisation.

4.3 Address Inequities

DESCRIPTION

Intersecting employee identities, harmful behaviours, and the distribution of power and opportunities in your company can create or worsen inequities across the organisation. Take action to address inequities to foster an equitable and inclusive workplace culture. Failure to act on the core EDI challenge of inequity while seeking to make progress on other 'easier' areas of EDI can make your company appear disingenuous in its ambitions and can build distrust. Acknowledge, address, and remedy unequal power dynamics and inequities in your organisation to create a more welcoming and equitable environment for all.

The following actions can foster fairness and equity within your organisation:

- *Address exclusionary and harmful behaviour.*
- *Shift your organisational design to better distribute power.*
- *Advance Truth and Reconciliation.*

ADDRESS EXCLUSIONARY AND HARMFUL BEHAVIOUR.

Encourage and empower employees (including through training) to take action when confronted with exclusionary or harmful behaviours, especially as a bystander. Consider treating concerning behaviours as a learning opportunity for offending parties but enforce policies and codes of conduct in the case of repeated harmful behaviour and undertake investigations as required. For fair workplace investigations, establish objective criteria to remove bias from assessments, implement accountability principles, and be mindful of confirmation bias. Move beyond the fear of legal retaliation and use open-door policies encourage employees to seek help for concerning behaviour before misconduct occurs. When witnessing harmful behaviour, such as microaggressions, ask for clarification behind a statement to encourage conscious rephrasing and recognition and acknowledgment of the harm it may have caused.

EXAMPLE: Concerns and Appeals Program at IBM

IBM's Concerns and Appeals program includes an open-door policy for employees to raise concerns with higher management and enables and encourages employees to submit anonymous concerns online, by email, or by phone, if they prefer. The program is built into IBM's [Business Conduct Guidelines](#) and building trust and encouraging employees to speak up on harmful behaviour is a critical aspect. IBM has processes in place to review all reports of actual or potential ethical conduct and take action where misconduct is identified.

Cultivate EDI Competencies

Help employees at all levels of the company to build the competencies they need to address exclusionary and harmful behaviour safely and meaningfully. The practice [Invest in People](#) can covers how your company can offer EDI resources and relevant training to its employees, including bystander intervention and allyship training.

SHIFT YOUR ORGANISATIONAL DESIGN TO BETTER DISTRIBUTE POWER.

Assess whether unequal power dynamics persist in your company's organisational structures and processes, particularly in decision-making and governance. Revisit your efforts to understand your organisation's structures and patterns. Reflect on how different groups are represented across all your company's levels and functions, how resources are distributed, and whether complex power dynamics in your organisation have the potential to disadvantage underrepresented groups. Take an intersectional approach to understand the different aspects of identity that contribute to complex power relations. Design a decision-making structure that remains effective and efficient, but that better distributes power across your organisation. Create transparent and accessible accountability structures that reflect the shift in your organisational design.

Understanding Organisational Structures and Patterns

The practice [Surface Structures and Patterns](#) can help your company to explore the organisation's policies, initiatives, practices, and its worldviews to identify the structures and any patterns of inequity they give rise to.

opportunities for your employees to build their awareness and take meaningful social action to help advance truth and reconciliation.

EXAMPLE: Cultural Awareness Training at Teck

Teck regularly delivers [training on cultural awareness](#) and the rights of Indigenous Peoples' to exploration, operations, and management staff in the organisation. The training educates employees on the history and culture of Indigenous Peoples' and how to effectively engage with Indigenous stakeholders where Teck's current projects work within Indigenous communities. In 2021, Teck refreshed its approach to include a consistent framework that more accurately ties in the culture, traditions, and priorities of local Indigenous communities to the training. In partnership with Raven Reads, Teck also launched an [Employee Indigenous Library](#) Program that covers the cost of a book by an Indigenous author for employees to gain a broader understanding of Indigenous worldviews and help them progress on their own reconciliation journey.

ADVANCE TRUTH AND RECONCILIATION.

Investigate and explore how your company has or may have supported historical wrongs against different groups, including inadvertently. Acknowledge historical injustices, their ongoing legacy of inequity, and, as relevant, the perpetuation of injustice. Understand the impacts on harmed communities face and the ongoing challenges they may face within your company. This could be socio-economic, cultural, and educational disadvantages that affect performance or career progression, exclusion from participation, discrimination, or other active harms. Cultivate a space for constructive dialogue on reconciliation with Indigenous Peoples at work and beyond. And create space (including through paid time off) and

4.3 Address Inequities

The Missing DEI Link: Radically Fair Workplace Investigations [↗](#)

This article discusses the interconnectedness between EDI efforts and fair workplace investigations, offering steps for companies to take towards eliminating bias from decision-making.

The Micropedia of Microaggressions [↗](#)

This encyclopaedia documents different types of microaggressions and their impacts. It offers guidance on how to avoid, respond, and be held accountable for microaggressions.

Recognizing and Responding to Microaggressions at Work [↗](#)

This article breaks down how to recognise microaggressions and their impact on the workplace. It provides important considerations to consider when addressing and responding to such instances at work.

Formal Grievance Procedure: Step by Step [↗](#)

This resource offers a step-by-step guide on the formal grievance process, offering insights on understanding the options, raising and responding to formal grievances, the grievance hearing, deciding outcomes, and after the grievance procedure.

Unequal Power: How the Assumption of Equal Bargaining Power in the Workplace Undermines Freedom, Fairness, and Democracy [↗](#)

This article offers crucial insights into how assumptions of equal power, particularly, within bargaining processes, can hinder freedoms, undermine legal protections, and perpetuate inequality in the workplace.

Be Aware of Organisational Power Relations [↗](#)

This article breaks down organisational power structures and offers a 5-R method of guiding questions to support reflection on power within your organisation.

Understanding the Power Dynamic at Work [↗](#)

This article offers different ways of looking at types of power and the impact they can have in the workplace.

IRCC Anti-Racism Strategy 2.0 – Change Management [↗](#)

This strategy outlines key actions at structural, relational, and transformative levels of change. It also features a wheel of privilege and power to guide intersectional understandings of how privilege and power.

Open Door Policy in the Workplace [↗](#)

This resource offers a template for an open-door policy that addresses its elements and manager and employee responsibilities.

Reconciliation in the Workplace [!\[\]\(1e1a06ebca281395f282cf61b1470f88_img.jpg\)](#)

This document by the FN Caring Society and UFCW Canada outlines key principles to guide reconciliation in the workplace to build inclusive and respectful workplaces.

Reconciliation Toolkit for Business Leaders [!\[\]\(19f0d8884a7d0fabc1023db5dd2e1ce8_img.jpg\)](#)

This toolkit by the Congress of Aboriginal Peoples outlines principles to help organisations progress towards meaningful reconciliation and collaboration with Indigenous Peoples.

Restructure Your Organization to Actually Advance Racial Justice [!\[\]\(49760b02c8a146741c00a37430e2b11c_img.jpg\)](#)

This article discusses how to truly pursue meaningful action and systemic change as well the importance of restructuring your organisation for long-lasting action on inequities.

The 2021 CEO Blueprint for Racial Equity [!\[\]\(348c25c94ee5ca49c1cc96f556376c91_img.jpg\)](#)

This resource offers actionable insights on how to leverage and embed racial equity within your company's strategy, from foundational actions to process-focused guidance covering aspects such as governance, worker voice, and operations.

5

EMBED IN CULTURE

[5.1 Demonstrate](#)

[5.2 Tell Stories](#)

[5.3 Foster Belonging](#)

[5.4 Respect and Include](#)

[5.5 Address Fear and Loss](#)

5.1 Demonstrate

DESCRIPTION

Daily actions and behaviours that reflect core EDI principles model and reinforce the inclusive culture your company aspires to, and they can send a powerful message about workplace expectations. Ensure company executives and people managers clarify and model inclusive behaviours to provide tangible examples for employees to follow. Visible actions, particularly from leadership, demonstrate the company's commitment to inclusivity and set a precedent that encourages others to remain mindful and foster positive change in their social interactions at work.

The following actions can inspire and empower meaningful change:

- *Outline culture principles to guide behaviour.*
- *Demonstrate and model fair and inclusive treatment.*
- *Foster a culture of openness and accountability.*

OUTLINE CULTURE PRINCIPLES TO GUIDE BEHAVIOUR.

Co-develop a set of principles that define the workplace culture your company aspires to, instead of defining what it is not through prohibited conduct. Cross-functional, company-wide engagement can help to secure buy-in and ensure the relevance, integration, and practicality of your culture principles. Clarify the key behaviours expected of your company's employees (instead of what not to do) and how these behaviours contribute to a more inclusive and equitable workplace. Include practical examples of how employees can foster a respectful workplace and clarify what actions they are empowered to take, such as allyship and bystander intervention. Proactively foster the conditions for culture change, including incentives and cultivating relevant competencies, broad leadership support, and openness to learn from others and from mistakes, for when missteps inevitably occur.

EXAMPLE: Nedbank's Culture Principles

Nedbank proactively co-designed a set of company-wide Culture Principles that describe the company culture and act as a guide to align employee behaviours, actions, and decisions to contribute to the company's overarching purpose. The seven principles focus on concepts such as putting purpose in practice, stronger together, different is good, and learning to grow. Each principle outlines what is expected from the employees and encourages self-reflection. The principles help Nedbank to articulate and signal the shift in culture the company wishes to see, drawing together major aspects of the workforce landscape to foster a purpose-driven approach to workplace culture.⁴

⁴ Source: interview with representatives of Nedbank Group

EXAMPLE: Amazon's Leadership Principles

Amazon works to integrate and reinforce inclusivity within its processes through [16 leadership principles](#) that demonstrate key characteristics that leaders should embody in their work. The principles help the company build inclusive teams and encourage employees to seek diverse perspectives, particularly looking to leaders to demonstrate the core values of an inclusive culture.

EXAMPLE: Allyship at Microsoft

[Microsoft](#) has built a shared language for and understanding of allyship and privilege to foster a culture where all employees are able to bring their authentic selves to work. This is further supported by initiatives, training, resources, and frameworks across the globe to guide practices at regional scales. An employee learning program encourages workers to build awareness and become more intentional about change within the workplace.

DEMONSTRATE AND MODEL FAIR AND INCLUSIVE TREATMENT.

Encourage executives and people managers to take visible actions that help to create an environment where employees can feel like they can bring their full and authentic selves to work. Encourage and equip them to demonstrate vulnerability, be open to and engage in continuous learning from experts and others in your organisation, and to model respect for all employees. Kindness can greatly promote wellness and belonging. Promote kindness in the workplace by encouraging (or incentivising) small acts of kindness throughout the day or so-called kindness rounds where individuals can acknowledge each other's efforts. Encourage and equip leaders to demonstrate authentic allyship by understanding and recognising the role of privilege, listening to others, and addressing acts of exclusion to drive a positive cultural change. Proactively demonstrating and modelling fairness and inclusivity can drive lasting cultural change, signalling to employees that behaviours such as accountability, vulnerability, and allyship are an integral building blocks of your organisational culture.

FOSTER A CULTURE OF OPENNESS AND ACCOUNTABILITY.

Encourage employees to model self-accountability and to take responsibility for their role in creating an inclusive culture as well as proactively address harm. Consider encouraging teams at all levels of the company to create a shared agenda for change, exploring how they can best foster mutual accountability, move beyond defensiveness, and design collaborative solutions to key challenges. At the company level, lead by example by being transparent and open in discussing company EDI initiatives with employees, including challenges, mistakes, and performance. And extend such practices to other areas of your company's operations. Define formal structures of accountability and be clear in distinguishing accountability from punishment. Create and model opportunities to communicate, share, and repair harm. And establish principles that make accountability a cultural norm within your organisation.

Investing in EDI Competencies

Ensure your company's leaders are equipped with the language, understanding, and skills to meaningfully model fair and inclusive treatment. See [Invest in People](#) for practices your company can use to foster EDI competencies.

5.1 Demonstrate

Leadership and Governance Indicators of a Rights Respecting Culture [↗](#)

This resource from Shift highlights practices and behaviours leaders can model to advance equity and inclusivity in the workplace.

Getting Real About Inclusive Leadership: Why Change Starts With You [↗](#)

Research by Catalyst provides insights on what leadership behaviours can model and drive inclusion in your organisation and describes a model of inclusive leadership that provides a balance between internal and external behaviours.

Don't Underestimate the Power of Kindness at Work [↗](#)

This article breaks down the importance of fostering kindness in your workplace and offers tips on how to begin promoting kindness.

Inclusive Leadership Guide [↗](#)

This guide by the Canadian Centre for Diversity and Inclusion discusses how to lead inclusively to stop racism in the workplace, including six key traits and actions you can take to embody them.

Workplace Weight Discrimination is an Overlooked, Critical Aspect of DEI [↗](#)

This article breaks down the often-overlooked dimension of weight discrimination and offers considerations when creating the conditions for change in your organisation.

Three Characteristics of Effective DEI Leadership [↗](#)

This article outlines characteristics all leaders should embody for success in creating an inclusive workplace culture.

Five Terms You Should Learn to Become a Better Ally [↗](#)

This article describes five key terms to guide your allyship journey and how to act on them.

Building a Culture of Accountability [↗](#)

This article explains the importance of a culture of accountability and offers practices to build anti-racism into your organisation.

Why it's Crucial to Walk the Talk as a Business Leader [↗](#)

This article discusses tips on how leaders can effectively model behaviour for a culture shift within their organisation.

5.2 Tell Stories

DESCRIPTION

Stories are powerful. They can shape your organisation's culture and its decision-making. Stories are everywhere in organisations, during day-to-day conversations, advocating for a course of action, or in formal external communications. Stories reinforce and give life to an organisation's identity and values, and they are often invoked to justify decision-making. As a result, stories can both guide and constrain how leaders and employees interpret your company's priorities and how they deliver on their responsibilities. Your company can leverage storytelling to reinforce the importance of your company's EDI ambitions and foster learning moments that encourage employees to consider what EDI means for them and the company.

The following actions can help guide your organisational storytelling on EDI:

- *Pay attention to the stories your organisation tells.*
- *Ensure communications are accessible, inclusive, and culturally appropriate.*
- *Align your internal communications.*

PAY ATTENTION TO THE STORIES YOUR ORGANISATION TELLS.

Take some time to understand the stories being told in and by your company about EDI. Consider formal organisational narratives in marketing materials, websites, and corporate reports, as well as informal narratives shared in the corridors or private conversations. Reflect on potential inconsistencies between these narratives. Consider what company and interpersonal narratives communicate about the priority, importance, and challenges of EDI efforts: are they positioned as core-to-business? Does your company celebrate and recall EDI achievements in the same way as, for example, operational cost savings? Is the company able to critically speak about its EDI shortcomings, if any? Consider too if any narratives or story inconsistencies undermine your EDI efforts. Work with company leaders and communications teams to reshape these stories or share new ones that better align with the organisation's EDI journey.

EXAMPLE: Storytelling at EY

Recognising the important role of storytelling in supporting a shift in organisational culture and behaviour, EY [embedded storytelling](#) into its leadership development program. Virtual workshops provided leadership an opportunity to hear stories from employees, allowing them to explore different perspectives and encouraging leadership to engage with concepts of psychological safety through an understanding of different experiences. The workshops also aimed to develop awareness around action bias, highlighting how a tendency to want to "fix" things first rather than listen and understand may lead to unintended misunderstandings and exclusion. Participants stated that this was an "eye-opening experience", as storytelling spurred emotional connections that supported a greater understanding of perspectives they had not encountered before.

EXAMPLE: Limiting Stories in a Male-Dominated Industry

The mining sector remains a predominantly male-oriented industry with global [estimates of women's participation](#) averaging below 20% of the workforce. Historically, a common narrative in the industry has been that there simply are no qualified women to hire and that there is no meaningful female talent pipeline. Within some companies, this narrative becomes both an explanation for lack of gender diversity, a justification for lack of progress, and a rationale for practices that perpetuate the status quo. Companies proactively working to change this narrative within their organisations and recognising their role in the industry's homogeneity are better positioned to tackle the challenges that prevent women from seeking and retaining employment in the industry, which often sets the groundwork for increased workforce diversity in the companies.

ENSURE COMMUNICATIONS ARE ACCESSIBLE, INCLUSIVE, AND CULTURALLY APPROPRIATE.

Make sure that your company's internal communications are clear, direct, and easy to understand. Designing communications with accessibility in mind requires ensuring that individuals with a range of abilities can access, interact, and contribute without barriers. This can include making communications available in multiple formats or languages such as providing sign language or captions for visual communications and ensuring that your written communications are compatible with screen readers. Tailor messages to resonate diverse perspectives by ensuring that language as well as examples remain inclusive: for example, many families are not made up of a mother, father, and two children. Consider how the cultural context of the receiver can impact how your company's message lands. Respect cultural norms and use your communications to create a space for diversity and foster belonging in your organisation.

EXAMPLE: Accessible Communications Policy at Government of Newfoundland and Labrador

The Government of Newfoundland and Labrador established an [Accessible Communications Policy](#) that outlines accessibility requirements for all public documents, publications, news releases, web-based information, meetings, press conferences, and events.

EXAMPLE: ClemenGold's Comic-strip Employment Contracts

In 2016, citrus producer ClemenGold, and its supplier Indigo Fruit, worked with Creative Contracts to design a contract for fruit pickers in the format of a [comic strip](#). Worker contracts are typically complex documents, often not fully understood by the individuals signing them. ClemenGold's inclusive approach to employment contracts helped to ensure that all workers, including those with lower literacy, clearly grasped the terms of the agreement they were about to sign, respecting the fruit pickers' agency and dignity in the process.

ALIGN YOUR INTERNAL COMMUNICATIONS.

Ensure that the stories, narratives, and visual representations used by your company in its internal communications authentically capture the diversity within its workforce. Align your company's communications to be internally consistent and focus on the core messages and priorities of your company's EDI ambitions and initiatives. To normalise and integrate EDI across company interactions, communicate your commitment to EDI on a regular, ongoing basis and reiterate its essential role in workplace culture and company success. Leverage internal communication channels, such as company newsletters and social networks, to share progress, opportunities for action, and employee stories. Also share opportunities for feedback and input, and encourage ongoing employee participation and engagement.

EXAMPLE: Employee narratives at HSBC

HSBC bank has produced a [series of videos](#) by employees that demonstrate personal successes, highlight successful EDI initiatives, and explore employee perspectives. One example features an employee's dramatic weight loss to improve his health and includes positive words of support from his colleagues; another involves an employee explaining how they set up sign language classes internally for employees; while another includes an employee expressing gratitude for working in an environment that allows him to be honest "about being gay, Portuguese and bald." The bank shared these videos internally and externally to engage employees (and other stakeholders) and to normalise and demonstrate the company's ongoing commitment to EDI.

5.2 Tell Stories

Shaping Your Organisation's Narrative Infrastructure [↗](#)

This guide from the Embedding Project is based on four years of research and over 100 interviews in twenty different global companies exploring the impact of organisational narratives and how change agents helped to shift them to better support strategic decision-making aligned with sustainability.

Storytelling for Sustainability [↗](#)

This guide from the Embedding Project was developed to help you understand what storytelling looks like in practice and reflect on this in the context of your organisation, develop a sense of why stories are important for embedding sustainability, and learn from other practitioners' experiences with storytelling to better plan your own efforts.

Disability-Inclusive Communication Guidelines [↗](#)

These guidelines from the United Nations Department of Global Communications provides insights on making all communications disability-inclusive and accessible, including emails, documents, and external engagements.

Cultural Competence in Communication [↗](#)

This article offers guidance on how to support culturally appropriate communication within your organisation and offers examples of good practices.

How to Make Your Internal Communications Inclusive [↗](#)

This article provides insights and tips on how to ensure that you are engaging your whole audience in your internal communications.

Story Structure: 7 Narrative Structures All Writers Should Know [↗](#)

This resource will help you to quickly understand the fundamentals of narrative structure, and provides a detailed review of seven well-established story-telling structures, such as the Hero's Journey and Dan Harmon's Story Circle.

The FrameWorks Institute [↗](#)

The FrameWorks Institute uses social science methods to develop techniques that will help you to explain sustainability-related topics more effectively, including racial and economic justice, and health equity. They provide articles and reports on these topics, as well as toolkits, which include practical framing strategies that communication specialists can immediately put to work.

Selling Sustainability: Primer for Marketers [↗](#)

This primer by the Futerra and BSR Sustainable Lifestyle Frontiers Group offers insight into how your company can be more strategic when communicating the functional, emotional, and social sustainability-related values of your products.

5.3 Foster Belonging

DESCRIPTION

A sense of belonging and acceptance at work greatly contributes to employee wellness and a positive work experience. Help to foster a feeling of belonging at work to gives employees the space and opportunity to bring their identities and experiences to work without worrying about exclusion or retaliation. Workplace belonging can contribute to a greater sense of purpose at work, foster connectedness within and to the organisation, and helps to offer a safe space for all employees.

The following actions can foster dignity and belonging in your organisational culture:

- *Create safe and welcoming spaces.*
- *Foster reconciliation in the workplace.*

CREATE SAFE AND WELCOMING SPACES.

Foster psychological safety for employees by encouraging open dialogue, respect, and collaboration without prejudice. Ensure that employees can challenge existing systems and practices without fear of retribution or retaliation and foster mutual respect as a core component of your organisational culture. Normalise safe conversations on key topics such as culture, ethnicity, gender, or race and foster and practice competencies of active listening and learning across all levels of your company. Ensure consistent approaches are available to help your company hold individuals accountable for harmful behaviour, no matter their position in the organisation. Emphasise relevant company policies and culture principles to guide behaviour. Create opportunities for employees from underrepresented groups to build connections and seek peer support, including through employee resource groups (ERGs). And consider if the design of your physical and virtual environments reflects these commitments; provide spaces that encourage connection and create inviting spaces for employees to engage with others as their full selves.

EXAMPLE: Employee Resource Groups (ERGs) at Vancity

Vancity Credit Union has established [six ERGs](#) with ERG focus areas including 2SLGBTQIA+, Indigenous, mental health, persons with disabilities, racial equity, and women's equity. While the ERGs started out as a grassroots initiative, the company recognised the need to clarify roles, scopes, and expectations for the ERGs and the rest of the organisation. This formalisation fostered a safer space for ERG members and gives ERGs the decision on EDI initiatives to advise on and engage in. Employees can join one ERG to balance business objectives with meaningful participation. All ERG chairs receive a stipend, and all members can dedicate set monthly hours to their ERG. The groups have an annual budget for speakers and events to help members to connect and foster a sense of workplace belonging. ERGs have leadership endorsement, and each selects its executive sponsor for a more deliberate process that encourages meaningful participation.⁵

⁵ Source: interview with representatives of Vancity

FOSTER RECONCILIATION IN THE WORKPLACE.

Consider if your company's workplace culture and workforce representation reflect meaningful efforts towards reconciliation with Indigenous Peoples, as well as other efforts towards redress of historic injustices that may be relevant in your context. Ensure your company honours days of cultural observances, as well as time required for traditional practices, such as seasonal subsistence hunting and gathering. Create space for different ways of knowing and Indigenous science, and support different ways of decision-making and governing, where relevant. Foster environments that are open to learning and cultural change to create the conditions for meaningful redress of the challenges faced by Indigenous employees. Engage in meaningful consultation on the workplace experience of Indigenous employees and utilise insights to co-create a culturally safe workplace for Indigenous talent. Work with employees and external groups to co-design a meaningful reconciliation action plan, including with a focus on the workplace. Provide Indigenous-designed cultural awareness and reconciliation training and learning opportunities for employees at all levels. Guide reconciliation through a holistic approach that embraces different worldviews and strengthens community at work.

EXAMPLE: Workplace reconciliation at Calian to support Indigenous recruitment and retention.

[Calian Group Ltd.](#) worked with Indigenous Works, an Indigenous-led non-for-profit, to co-design a strategy for engagement and reconciliation. The company works with various Indigenous communities and hires Elders to deliver Indigenous knowledge training to Canadian Armed Forces across Canada. The company also offers its staff of over 4,000 reconciliation training and is actively working on Indigenous recruitment as a part of its engagement strategy to help increase its proportion of Indigenous employees, who were underrepresented in the company's workforce.

Advancing Truth and Reconciliation as a Company

The practice [Advance Truth and Reconciliation](#) can help your company to understand historical injustices, your company's possible contributions, and how to take action to address this, including by supporting employees' personal reconciliation journeys.

5.3 Foster Belonging

WELL Building Standard [↗](#)

This resource from the International WELL Building Institute can help you create intentional spaces that enhance worker wellbeing.

The Value of Belonging at Work [↗](#)

This article breaks down the importance of belonging in the workplace, addressing how it can positively impact your organisation.

15 Ways Your Organisation Can Create a Safe Space in a Divisive World [↗](#)

This article offers guidance from Forbes Coaches Council on how to make your employees feel included and safe at work.

How Companies Can Break Down Barriers and Empower LGBTQ+ Employees [↗](#)

This article provides guidance practices that foster connection, break down barriers, and empower LGBTQIA+ employees within your organisation.

People are at the Heart of EDI: Why Focusing on the Business Case is Holding Us Back [↗](#)

This article provides insights on how to foster respect, psychological safety, and belonging in your organisation.

Reconciliation Toolkit for Business Leaders [↗](#)

This toolkit by the Congress of Aboriginal Peoples outlines principles to help organisations progress towards meaningful reconciliation and collaboration with Indigenous Peoples in (the country currently known as) Canada.

Women in the Workplace 2023 [↗](#)

This report by McKinsey & Company debunks four myths about women's workplace experiences and provides solutions for organisations to make meaningful progress towards gender equality and belonging.

2 Things Most People Get Wrong About Autistic Talent [↗](#)

This article provides considerations and guidance for fostering inclusive spaces for neurodiverse people in the workplace, including stereotypes to avoid and actions that help team neuroinclusion in your organisation.

5.4 Respect and Include

DESCRIPTION

A respectful and inclusive workplace helps to foster workforce diversity and is typically at the core of company EDI strategies. To advance inclusivity as an organisational priority, ensure your company respects the different facets that make up employees' identities and cultivate an environment where these differences are acknowledged, welcomed, and appreciated. Work to ensure that all individuals have equitable access to opportunities and resources. Embracing and seeking out different perspectives empowers all employees to bring their authentic selves to work without fear of prejudice and can help your company to foster more nuanced insight into its workplace and any business challenges.

The following actions can help your company to ensure employees are and feel respected and included:

- *Respect local and cultural protocols.*
- *Use inclusive language.*
- *Ensure activities and events are inclusive and accessible.*

RESPECT LOCAL AND CULTURAL PROTOCOLS.

Understand regional and local protocols for the various locations where your company operates and demonstrate respect by honouring customs, norms, and traditions. Take time to research and educate your company's workforce on the local culture, heritage, and practices and engage local perspectives to understand where your company may need to adjust its approaches or create space for other practices. Proactively consider what it looks like to respect local cultural protocols if some may misalign with company policies, values, or human rights commitments and communicate your company's approach and expectations clearly to the local workforce. Also consider the cultural and spiritual customs of your broader workforce, including underrepresented groups. Respect spiritual beliefs by offering appropriate spaces for prayer and accommodating for religious holidays. Overall, ensure employees avoid assumptions and personal biases in personal interactions and engage on the basis on mutual respect. Provide territorial acknowledgements where relevant to highlight the importance of recognising historical links and injustices.

EXAMPLE: Ascot Resources and Nisga'a Signage

While working with members of the Nisga'a Nation at its local mine sites, Ascot Resources worked with the Nisga'a Aayuukhl Department responsible for protecting, preserving, and promoting language, culture, and history, to place [signage with both Nisga'a and English wording](#) on mine sites. The initiative offered the opportunity to respect and raise awareness about the local language, while also supporting the preservation of an Indigenous language, many of which are threatened with extinction worldwide.

USE INCLUSIVE LANGUAGE.

Language plays a major role in how employees perceive your organisation and whether they feel comfortable within it. Ensure all your physical, virtual, and verbal communications use inclusive language. Encourage and normalise integrating pronouns into introductions and identity neutral phrasing within the workplace. Consider encouraging employees to include pronouns in their email signature or video conference screen names to increase comfortability and ease of

reference. In formal and informal communications, require affirmative language, such as person with a disability, instead of negative phrasing. And encourage inquiring whether individuals prefer people-first language (person who is deaf) or identity-first language (deaf person), considered equally appropriate depending on personal preference. Encourage the use of wording that is simple to understand and avoids metaphors and culturally-specific expressions or references. Consider any impacts or implications wording or graphics and icons may have, which assumptions or prejudices they may contain, and which employee groups they may be excluding. All employees should feel comfortable, included, and considered in the way your company communicates.

EXAMPLE: Canadian Museum for Human Rights and Inclusive Language.

The Canadian Museum for Human Rights established a [style guide and lexicon](#) to ensure the use of inclusive language throughout the museum's communications. It outlines specific rules and best practices to follow when referring to Indigenous peoples, ethnic or racial groups, persons with disabilities, and people with diverse sexual orientations and gender identities.

ENSURE ACTIVITIES AND EVENTS ARE INCLUSIVE AND ACCESSIBLE.

Ensure that company events and activities are held in easily accessible sites, including but not limited to physical accessibility and transit access. Ask for employee's dietary needs or restrictions and have a range of dietary options available such as vegetarian, gluten-free, and halal foods. Consider how certain activities may be exclusionary – for example, a team building outing to get drinks may not be comfortable or inclusive to those with religious restrictions or in recovery. And impromptu after-work events may not be accessible for employees with child, elder, or pet care responsibilities.

5.4 Respect and Include

Five Ways to Make Your Organisations Language More Inclusive [↗](#)

This article provides key considerations to ensure that your organisation communicates in a way that cultivates an inclusive and welcoming environment.

Inclusive Language Guide [↗](#)

This resource explores how the ways we write can inadvertently reinforce inequalities and the importance of remaining mindful and purposeful with the language we use to make sure everyone feels respected and included in the workplace.

Words Matter: Guidelines on using Inclusive Language in the Workplace [↗](#)

This guidebook by the Government of British Columbia offers best practices and principles for inclusive language for various identities and groups within your workplace.

A Short(ish) Guide to Pronouns and Honorifics [↗](#)

This article explains the importance of pronouns and provides guidance on how to engage in asking about pronouns, unpacking your assumptions, honorifics, and what to do if you make a mistake.

Pronouns Matter [↗](#)

This resource by Pronouns.org is a key source for individual learning on what pronouns are and why they matter.

How Managers Can Make Casual Networking Events More Inclusive [↗](#)

This article breaks down how certain workplace events and activities can be exclusionary to groups and offers considerations to create engaging and inclusive events for all employees.

How to Talk About Religion at Work [↗](#)

This article considers opportunities for leadership to tactfully approach conversation about religious diversity and ways to support meaningful inclusion at work.

6 Steps to Respecting and Accommodating Religion in the Workplace [↗](#)

This blog post outlines modifications and accommodations your organisation should consider fostering respect for spiritual beliefs and support religious diversity.

Diversity, Equity, and Inclusion Event Planning Checklist [↗](#)

This event planning checklist offers key insights, guidelines, and considerations to keep in mind when planning events of any size to ensure it remains inclusive and accessible to a range of groups.

Trans-forming the Workplace to Be Transgender Inclusive [↗](#)

This article includes practices and insights for ensuring your workplace is transgender inclusive, including the importance of pronouns, education, and gender-neutral bathrooms.

5.5 Address Fear and Loss

DESCRIPTION

Your company's efforts to pursue equity and inclusivity in your organisation can sometimes spark feelings of fear or exclusion from people with privileged identities, especially if they feel less familiar with EDI concepts and practices. And efforts towards equity and redress can make individuals feel forgotten, blamed, or as if something is being taken away from them. These feelings may be considered taboo in your organisation and remain unvoiced, but whether your company hears such concerns or not, it is very likely these feelings exist. Change has real impacts, it may provoke feelings and reactions, and your company should acknowledge them and decide how to engage them on its EDI journey.

The following actions can help you approach EDI-related fear and loss in your company:

- *Invite and include privileged identities into EDI spaces.*
- *Meet individuals where they are.*
- *Address resistance with patience, understanding, and firmness.*

INVITE AND INCLUDE PRIVILEGED IDENTITIES INTO EDI SPACES.

Acknowledge that employees with privileged identities are part of your company's journey to create an inclusive and equitable workplace. Don't make assumptions about their position and perspectives as privileged insiders. Instead, invite and welcome their participation and perspectives in EDI-focused conversations, provided their engagement is respectful and does not create unsafe spaces for others (as applies to all participants). Emphasise the importance of support from privileged identities on EDI initiatives, frame their identity as a source for insight in your organisation, and clearly communicate the need for their input in invitations to participate. Create room for employees of all identities to engage in mutual learning. Re-frame opportunities for allyship, advocacy, mentoring, and sponsoring, as spaces for privileged individuals to lend their privilege towards meaningful change.

MEET INDIVIDUALS WHERE THEY ARE.

Understand the background that shapes the experiences of privileged identities and how that may affect the way they view EDI initiatives. Allow individuals explore their identities and privileges at their own pace and help them to understand the harmful legacies they may be inadvertently

perpetuating. Acknowledge feelings about culture change, including fear of saying or doing the wrong thing. Frame EDI as a lifelong learning journey – don't blame or shame individuals and don't force change on your company's schedule, but rather provide opportunities for privileged identities to understand the complex systems that shape their experiences and those of others. Help them build empathy, understanding, and connection through coaching, conversations, and other experiences that help privileged individuals gain first-hand insights to shape their understanding of inequity. Support and connect those who are confronting their complicity to better equip them to chart different paths and clarify their role in EDI within your organisation.

EXAMPLE: Expanding Leadership Vision at Fractured Atlas

When [Fractured Atlas](#) updated its company value statement to include a commitment to becoming an anti-racist and anti-oppressive organisation, the leadership team went through a series of reflective workshops and discussion-based sessions to understand their vision. These discussions helped the leadership team realise and confront that, while their intent to build a great place to work was important, their vision at the time only created spaces for those that looked like them.

ADDRESS RESISTANCE WITH PATIENCE, UNDERSTANDING, AND FIRMNESS.

Cultural change requires change management, meaning that your company will need to foster awareness, understanding, competencies, and the desire for employees to join the company on its EDI journey. Challenging existing norms and changing structures can create discomfort and resistance from dominant identities that may feel disadvantaged or targeted under EDI programs. Promote a listening environment and facilitate intentional discussions that build understanding about the need to cultivate an inclusive workplace. Address zero-sum thinking and the fear of losing status that hinders their acceptance – explain the legacy of historical inequities and counter presumptions of fairness that conflict with pursuing equality. Clarify the long-term vision and how creating an inclusive organisation can benefit them beyond what they may perceive as a loss of opportunity. In practice, efforts to foster pay equity can sometimes result in real reductions in compensation. Ultimately, your company cannot compel its employees to stay, but if they do, remain firm on the requirement for them to advance EDI and participate.

EXAMPLE: Google's Ideological Echo Chamber

In 2017, an internal document titled "Google's Ideological Echo Chamber" written by an employee stated that they believed that Google's diversity initiatives discriminated against dominant groups and created tension within the organisation. In response, Google's Vice President of Diversity, Integrity, and Governance issued [a memo](#) that firmly reasserted the importance of diversity and the efforts of the company towards inclusivity. However, this statement also acknowledged that part of building an inclusive workplace means individuals with alternative views can express their opinions and the importance of open dialogue in driving inclusion. Nonetheless, the employee was later fired for violating Google's Code of Conduct.

5.5 Address Fear and Loss

White Men Are Feeling Left Out of Diversity, Equity, and Inclusion. Why Should We Care and What Should We Do? [↗](#)

This article explores why privileged identities may be feeling excluded from EDI and how to encourage them to participate in meaningful change beyond the fear of loss.

How to Show White Men That Diversity and Inclusion Efforts Need Them [↗](#)

This article provides two practices that can help you overcome defensiveness and resistance to EDI in your organisation.

Managing Resistance to Diversity, Equity, and Inclusion Workplace Initiatives [↗](#)

This article offers a strategies and solutions to keep in mind when getting buy-in for your EDI initiatives from those that may be hesitant or resistant to change.

Becoming an Agent of Change [↗](#)

This guide breaks down how privileged insiders can build on their capacity to be champions for change, including how confronting complicity is a critical step in their journey.

To Overcome Resistance to DEI, Understand What's Driving It [↗](#)

This article breaks down why individuals may resist EDI initiatives, how they respond to different kinds of perceived threats, and offers suggestions for how to work past these feelings of loss.

Understanding Advantaged Groups Opposition to Diversity, Equity, and Inclusion (DEI) Policies: The Role of Perceived Threat [↗](#)

This research article breaks down the different types of perceived threats of EDI and provides an overview of literature on how to mitigate these reactions.

Men Think They are Strong Workplace Allies. Women Disagree [↗](#)

This article and study compared answers from women in male-dominated fields with male colleagues to understand the nuances of workplace allyship.

Confronting "Whiteness" at Work to Improve Diversity Efforts [↗](#)

This article discusses the significance of confronting the ideas of "whiteness" as integral to supporting efforts to create inclusive organisation.

6

REVIEW AND IMPROVE

[6.1 Monitor your progress](#)[6.2 Reflect and revise](#)[6.3 Disclose and communicate](#)

6.1 Monitor Your Progress

DESCRIPTION

Track your progress on EDI to objectively understand and assess the impacts of your commitments, efforts, and investments within the workplace. Identify and celebrate key areas of success, spot missed opportunities, and pinpoint efforts and investments that were insufficient or ineffective at bringing about the changes that your organisation set out to achieve.

The following actions can help you monitor your progress on EDI:

- *Understand how your company monitors progress.*
- *Measure your progress on EDI.*
- *Identify trends and patterns.*

UNDERSTAND HOW YOUR COMPANY MONITORS PROGRESS.

Review what EDI-relevant data your company gathers and assess the methods through which it acquires the information, how it is transmitted, and where it is stored. Review if EDI data is predominantly qualitative, quantitative, or both, and assess the level of confidence in the accuracy of this information, including, as appropriate, with support of your company's internal audit team. Identify if your company monitors progress by assessing budget or timeline compliance, project completion, progress against established targets, or other indicators. Find out which individuals at which levels of the company review the information and how, including graphic dashboards, reports, summaries, or raw data. Consider how frequently your company monitors progress, and evaluate whether your monitoring approaches, data quality, and monitoring cycles support meaningful and timely insights into the success of your company's EDI efforts.

MEASURE YOUR PROGRESS ON EDI.

Review the EDI data and insight needs that your company identified in the [Surface Structures and Patterns](#) section, and design appropriate indicators and metrics to help your company understand progress on its EDI goals and gain other meaningful and actionable insights, including for disclosure. Calculate the investments of time, resources, and other inputs into your company's EDI efforts and quantify outputs and outcomes. Gather employee perceptions and feelings, using both qualitative and statistically relevant quantitative data and integrate this into your company's measurement of outcomes. Ask about feelings and experiences that can support your understanding of EDI in your workplace, such as measuring employee's sense of belonging in annual surveys. Compile data in a consistent way and on a regular timeline to ensure comparability and enable you to understand your progress over time.

EXAMPLE: Measuring Diversity and Inclusion at Adobe

[Adobe](#) measures diversity and inclusion within their organisation in several ways. Employees are surveyed regularly to understand their perceptions and feelings about workplace culture and environment. The company continuously monitors the fairness of hiring and compensation within the organisation through on-demand data analytics across global sites. Progress on different dimensions of EDI is tracked and reported annually.

IDENTIFY TRENDS AND PATTERNS.

Analyse the EDI-relevant data that your company has collected to detect key trends and patterns. Understand, as relevant, where your company is making progress, where EDI outcomes are stagnating, and which indicators reveal possibly worsening performance. Reflect on and investigate which efforts, initiatives, or other factors are contributing to the trends your company has identified. Reflect on patterns across your company's EDI progress and identify areas where your company may need to undertake intentional efforts to support systemic change or to sustain momentum. Aim to understand the feedback loops in your organisation that drive inclusion and what systems or structures need further support or investment to truly embed EDI.

EXAMPLE: Diversity and Inclusion Statistics at Apple

Apple tracks, compares, and publicly discloses [diversity statics](#) for a range of key workforce demographics. The Apple workforce data covers overall and specific units such as tech and retail, further dividing into gender globally and by ethnicity over the years. The company assesses trends in workforce diversity changes, providing data trends from 2014 to 2022 for global female representation and U.S. underrepresented community representation within Apple, its R&D teams, and Non-R&D teams. The trends Apple identifies guide areas for further focus and showcase progress made over the years to create a more diverse and inclusive workforce.

6.1 Monitor Your Progress

How to Measure Inclusion in the Workplace [↗](#)

This article breaks down the complex nature of inclusion and outlines how to use the Gartner Inclusion Index to measure key aspects of inclusion across your organisation.

7 Metrics to Measure Your Organisation's DEI Progress [↗](#)

This article outlines key EDI metrics across the employee lifecycle your organisation should track in the work towards becoming an equitable and inclusive workplace.

9 Metrics to Help You Understand (and Prioritise) DEI [↗](#)

This article offers key EDI metrics to consider, breaking them down into metrics focused on the employee lifecycle, employee experience, and company makeup.

Measuring Progress [↗](#)

This guide by the University of Washington for the American Institute of Architects explains key aspects of measuring progress on EDI and presents ways to understand your improvements towards your goals.

Data Driven Diversity [↗](#)

This article provides a metrics-based approach to EDI that can measure both outcome and process progress throughout your EDI work.

Indicator Design Tool [↗](#)

This tool supports the development of evidence-based targets and indicators through a seven-step process and provides a template workbook.

How to Create a Diversity Scorecard [↗](#)

This article outlines a basic diversity scorecard to help you monitor your progress on EDI and support your understanding of trends resulting from your initiatives.

6.2 Reflect and Revise

DESCRIPTION

Reflecting on your progress or lack thereof and the factors that may have contributed to these outcomes is a crucial step for continuous improvement across the implementation of your EDI efforts and, as needed, adaptation of your EDI solutions, work plans, or strategy. Ensure your policies, investments, and initiatives remain impactful and relevant to your organisation and its specific needs at the current stage of its EDI journey. Identify and rework aspects that may be hindering you in the work towards an equitable workplace.

The following actions can help your company meaningfully adjust its EDI journey:

- *Evaluate progress towards EDI commitments.*
- *Adapt company strategy to refine its approach.*

EVALUATE PROGRESS TOWARDS EDI COMMITMENTS.

Evaluate the progress your company has made towards achieving its EDI commitments and assess if this aligns with the anticipated outcomes and timelines. Use relevant metrics, data, trends, and the insights from previous steps about effective and ineffective or even detrimental tactics to determine key areas for improvement. Revisit employee feedback and perceptions to evaluate if progress is indeed reflected in how employees experience your company's workplace culture. Consider creating a committee responsible for reviewing EDI performance across a broad range of indicators and provide direction to the company on necessary adjustments and refinements. Ensure that this committee's composition is inclusive and representative of different employee groups across your company.

further intersected with evaluated progress on representation goals during the same cycle to align both feedback loops as a way to reduce the pay gaps.

ADAPT YOUR STRATEGY.

Clarify which EDI efforts are currently effective and which are not driving change in your organisation and require pivoting, refinement, or retirement. Using insights from reflections and recommendations from your company's EDI committee, adapt your company's policies and procedures, and/or devise new initiatives to better advance your company's EDI performance. If your company's overarching EDI commitments still align, but the interim steps need to be adjusted, ensure that you do so transparently, explaining your rationale for the change and for the new targets. Also revisit the effectiveness of your company's entire EDI strategy. Connect top-down and bottom-up approaches into your strategy review. And if your company finds its overall approach has been ineffective or if your company has mostly achieved what it set out to do, it may be time to retire the current EDI strategy. Revisit the steps under [Commit](#) to make relevant adjustments or design a new EDI strategy to foster a more equitable, diverse, and inclusive work environment, based on your new understanding of your company's current challenges, EDI performance, and employee needs.

EXAMPLE: Progressing Pay Equity at Citibank

[Citibank](#) discloses unadjusted pay gaps for both women and minorities as a way to stay accountable for progress. The company has so far evaluated the pay gaps twice in a three-year period and has used an analysis of metrics and available data on compensation to make appropriate pay adjustments within the annual compensation cycle. The goals are

EXAMPLE: The Office of the Superintendent of Financial Institutions (OSFI) and Its Evergreen DEI Strategy

OSFI considers its DEI strategy to be an [evergreen document](#) and the organisation is committed to adapting and changing its strategy as the organisation gains new insights from measuring its DEI practices over the years.

EXAMPLE: Elevating Impact Through Insights at Randstad

After launching an initiative to support the economic empowerment of at-risk women, [Randstad](#) continued an analysis of performance and feedback to monitor the program's effectiveness. This brought to light key insights on what was lacking for participants within the program – knowledge that would not be available within the organisation unless this rigorous feedback model was implemented. This allowed Randstad to create specific changes to their offerings in response that resulted in a significant increase in the ability of women to successfully complete the program.

6.2 Reflect and Revise

How to Review your Diversity and Inclusion Initiatives (4 Easy Tips) [↗](#)

This blog article breaks down four simple methods to analyse your organisations D&I efforts to drive meaningful change.

How to Best Use Data to Meet Your DE&I Goals [↗](#)

This article addresses how to use diversity data to empower the right actions, set goals that match your capabilities, and increase follow-through.

Introducing Confidence-Building Measure to PRI Signatories [↗](#)

This paper by PRI offers a three-pronged approach to confidence-building measures to highlight areas of improvement as well as risks and opportunity in internal data collection mechanisms.

Guidance on Improving the Quality of ESG Information for Decision-Making [↗](#)

This guide provides suggestions on how to improve the quality of your ESG information, identify necessary improvement opportunities and make changes to benefit your monitoring process.

6.3 Disclose and Communicate

DESCRIPTION

Inform your company's employees and other stakeholders about your company's EDI performance, challenges, and the actions being taken to foster a workplace culture of inclusivity and belonging. Ensure your company transparently and comprehensively discloses EDI successes as well as shortfalls or setbacks, to remain accountable to its commitments and to foster trust and support for its efforts. Invite feedback and discussion on your company's key metrics and EDI progress and integrate insights back into the business to drive meaningful change and improvements.

The following actions can support effective and meaningful EDI disclosures:

- *Share EDI progress internally.*
- *Transparently disclose performance externally.*

SHARE EDI PROGRESS INTERNALLY.

Communicate new strategies, ambitions, frameworks, and initiatives with employees, both to create opportunities for meaningful input and to ensure workforce awareness and engagement on your company's cultural change journey. Also share progress, successes, and challenges, as well as the outcomes of employee surveys or other input and feedback initiatives. This socialises and normalises the topic of EDI in your organisation, helps employees kept abreast with organisational changes, supports their active participation, and demonstrates your company's commitment to genuine change, instead of performative efforts. Be transparent about what is driving success or where you are facing challenges to ensure employees can understand and connect to the efforts your organisation is making to visible and felt change in their workplace. Also ensure your company prepares relevant and timely internal EDI reporting to senior leadership and the board, to enable them to understand progress, challenges, and evolving company risks and resourcing requirements. Understand your executives' and directors' information needs and prepare concise, decision-useful reports at the requested intervals, and at least annually.

EXAMPLE: Communicating EDI internally at BlackRock

[BlackRock](#) established a Director of U.S. and Canada DEI Client Engagement who creates materials on the company's EDI initiatives and processes for internal and external audiences. In 2022, the Director launched a "DEI 101 Curriculum" to offer employees new information and resources to learn about and engage with the company's emerging EDI efforts.

TRANSPARENTLY DISCLOSE PERFORMANCE EXTERNALLY.

Transparently disclose your performance externally, including your successes and challenges, in annual sustainability or stand-alone EDI reports, on your company's website and social platforms. Share or link or to more in-depth EDI-relevant information and analysis that is accessible to all. Review disclosure expectations to ensure you publish meaningful data on dimensions such as representation, hiring and retention, and pay-gaps across all levels of your organisation. Publish them alongside your organisational EDI targets and past years' performance to enhance transparency. Avoid social-washing (making your company appear

more socially sustainable than it really is) or making disclosure a box-ticking exercise. Consider the language your company uses and the stories it tells in its disclosures, and consider providing data books that include EDI data, so that various audiences can do their own assessments and draw their own insights from your company's performance data.

EXAMPLE: British Land's Gender and Ethnicity Pay Report

British Land produces an [annual report](#) that discloses gender and ethnicity pay gaps as an important component of the company's commitments to transparency on its EDI performance. The report outlines progress against key metrics, challenges that continue to persist, and dive more deeply into the causes and issues that may require further commitments. The report also includes a broad action plan for further closing the wage gap between groups.

6.3 Disclose and Communicate

Sustainability Reporting Frameworks: A guide for CIOs [↗](#)

This report can act as a primer for the most common ESG reporting frameworks. It provides a basic understanding of each framework and their fundamental differences.

ESG Disclosure Handbook [↗](#)

This guide by the WBCSD offers a structured process for your ESG reporting decision-making process and addresses common questions about ESG disclosure.

Diversity of Boards of Directors and Senior Management [↗](#)

These guidelines by the Government of Canada provide information on diversity disclosure requirements for federal distributing corporations.

Advancing Modern Slavery Reporting to Meet Stakeholder Expectations [↗](#)

This toolkit by the GRI and Responsible Labor Initiative includes a practical approach to report on modern slavery within value chains.

EDI Language in Annual Reports is Still Highly Biased [↗](#)

This article presents a discussion with Jacqui Gagnon, assistant professor, and CPA research scholar, on how language patterns within EDI reporting can create trends that perpetuate unconscious bias.

Why You Should Prioritize Sharing DEI Data [↗](#)

This article offers insights on the importance of internal and external reporting as a way to drive strategies, including how internal data sharing can help encourage leadership to prioritise EDI.

Risk Assessment Tool [↗](#)

This tool provides an outline to quickly assess a potential risk for your organisation.

ACKNOWLEDGEMENTS

This research was supported by funding from
QuadReal Property Group and Vancity



And by the Social Sciences and Humanities
Research Council of Canada



Social Sciences and Humanities
Research Council of Canada

Conseil de recherches en
sciences humaines du Canada

Canada

The Embedding Project is hosted by
Beedie School of Business at Simon Fraser University.



The Embedding Project also gratefully acknowledges the contributions of Sally Crane and Marina Starck in the development of this guide as well as helpful input from Ayesha Howitt, Katie Ungard, Andee Uren, and Simon Pek.