Canadian Institute of Diversity and Inclusion
Institut canadien de la diversité et de l'inclusion

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Locking in Your Leadership:

Toolkit for Developing a Diversity and Inclusion Strategy

September 10, 2014.

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Contents.

About the Canadian Institute of Diversity and Inclusion.

The Canadian Institute of Diversity and Inclusion ("CIDI") is a national non-profit organization that is quickly becoming the trusted advisor for all issues related to Diversity and Inclusion, and Human Rights and Equity within Canada's workplaces.

Effectively managing Diversity and Inclusion ("D&I") is a strategic imperative for all Canadian employers. In many organizations human resources and D&I practitioners are responsible for achieving substantial performance goals as well as transforming their organizations into inclusive work environments; however, they are often under-resourced creating challenges in achieving their organization's strategy.

CIDI helps employers, business leaders, human resources ("HR") and D&I practitioners effectively address the full picture of diversity within the workplace by providing innovative and proven strategies, research, tools, events, and educational supports with the goal of helping improve the overall inclusivity of the Canadian workforce.

CIDI's six key areas of focus include the following:

» **Supporting our Members** (individual members and Employer Partners) on their D&I journey. This is done through our monthly webinars, our Community of Practice events (held quarterly in major cities across Canada) which provide engaging, productive networking and promising practice sharing where business, HR and D&I professionals come together to share and learn, and providing ad hoc advice to members on an array of issues related to managing D&I in their organizations.

» **Education.** Providing employers with a library of practical, effective learning solutions for leaders, management teams,

Diversity Councils, ERG leaders, HR and D&I professionals, and all people.

» **Knowledge Repository.** A centralized online library of D&I research, data, and promising practice information, with a specific focus on Canada.

» **Research.** Cutting-edge exclusive research that contributes to the Canadian conversation on diversity and inclusion.

» **Legislative Support.** Providing practical experience to help employers with compliance related to current and future D&I related legislation (Employment Equity Act, AODA, etc.).

» **Consultancy.** Practical, credible, and sustainable consulting services specific to D&I in Canada, provided by a team of subject matter experts with decades of experience delivering D&I work inside organizations.

To learn more about CIDI, please visit our website at **www.cidi-icdi.ca**.

Founding 25 Partners.

CIDI is a member-supported organization, providing services to both individual members and Employer Partners. We would like to acknowledge the exceptional support and dedication of our Founding 25 Employer Partners.

For more information on becoming an Employer Partner with CIDI, please contact us or visit **www.cidi-icdi.ca**.

Advisory Board.

The commitment, drive and passion of our Advisory Board is critical to the success of CIDI. We thank them for their continued support and dedication.

Beverley Aikenhead
Manager, Organizational Development
Region of Waterloo
Waterloo, ON

Cyndy Allen
Team Lead Consulting, Respectful Workplace and Diversity
Bell Aliant
Halifax, NS

Kim Clark
Toronto, ON

Dr. Rick Colbourne
Adjunct/Visiting Professor
Executive Education, Organizational Learning, Indigenous Business
Vancouver, BC

Wayne Cuervo
Senior Manager, CSR and Diversity
Cisco
Toronto, ON

Fiona Easton
HR Manager – Diversity and Inclusion
TELUS
Vancouver, BC

Zohra Halani
Team Lead, Diversity and Inclusion
Husky Energy
Calgary, AB

Tej Singh Hazra
Head of Diversity and Inclusion
HSBC Bank Canada
Vancouver, BC

Mubina Jaffer
Toronto, ON

Wade King
Advisor, Safe Disclosure and Human Rights
University of Alberta
Edmonton, AB

Deanna Matzanke
Director, Workforce Strategies and Employment Relationships
Scotiabank
Toronto, ON

Matt Petersen
Senior Director, Diversity and Inclusion
CIBC
Toronto, ON

Zakeana Reid
Senior Manager, Strategic HR Initiatives
Morrison Hershfield
Calgary, AB

Elizabeth Reynolds
Manager, Diversity and Inclusion
KPMG
Toronto, ON

Pauline Streete
Diversity Leader
SaskPower
Regina, SK

Sandeep Tatla
Chief Diversity Officer
Ontario College of Trades
Toronto, ON

Norma Tombari
Director, Global Diversity
RBC
Toronto, ON

Lisa Vogt
Partner, Chief Diversity Officer
McCarthy Tétrault
Vancouver, BC

Vanessa White
SVP, Human Resources
Sodexo
Burlington, ON

Introduction.

We are pleased to present the second in our series of toolkits entitled: *Locking in Your Leadership* – Toolkit for Developing a Diversity and Inclusion Strategy.

What is a Strategy? The dictionary definition is: "a plan of action or policy designed to achieve a major or overall aim." A strategy is a roadmap, outlining where you want to go and how you will get there.

So, if your aim is to create more inclusive workplaces, then you need a Diversity and Inclusion ("D&I") Strategy to articulate the plan for how you are going to do that.

Strategic planning is an imperative in any organization. Almost all organizations in any industry or sector – whether for profit, public sector, or non-profit – have a strategic plan usually spanning 3 to 5 years, which has measurable goals and timelines, and which is reviewed and renewed on an annual or quarterly basis.

If organizations are managing the goals they want to accomplish this way, it's imperative for D&I practitioners to follow suit.

In 2013, we hosted our first Community of Practice ("COP") events in Calgary, Edmonton, Toronto and Vancouver. We asked participants to identify some of their major "pain points" – the challenges they were facing that affected their ability to succeed when it comes to D&I, or Human Rights and Equity ("HR&E") in their respective organizations.

While many issues were discussed, and there were some regional differences, three themes were identified at every single table group in every city:

- Leadership and/or organizational buy-in;
- Prioritization of D&I and HR&E Initiatives; and
- Resources for successful execution – both human capital and financial.

We heard the message loud and clear: organizational leaders were still not "getting" the business case or imperative for diversity and inclusion, or human rights and equity. So we set out help you articulate the business case for D&I and HR&E in your organizations.

For our next round of Community of Practice events, we engaged participants in developing the ironclad business case for D&I. In January 2014, we released the first *Locking in Your Leadership* report: *'Developing the Ironclad Business Case for D&I'* – a toolkit that walks you through the process of creating a customized business case or imperative document for D&I or HR&E in your organization.

The next step in the process was helping organizations to articulate a D&I Strategy. In early 2014 we engaged over 180 professionals who attended our events at six cities across Canada – Montreal, Ottawa, Toronto, Edmonton, Calgary and Vancouver – to do just that.

The purpose of this toolkit is to give you the framework for creating a D&I Strategy document that can be easily customized to suit your own organization.

A note about verbiage: As in the Business Case toolkit, we recommend that you customize your verbiage so that it will be meaningful and valid in your organization. If Human Rights and Equity

is the more appropriate term in your organization, by all means, use it. However, for ease of reference, throughout this report, we will refer to it as a D&I Strategy – with the understanding that we mean any strategy for D&I or HR&E in an organization.

Why should you align with your organization's established way of doing things? Ultimately, as a D&I practitioner, you are a change agent in your organization, working from within to affect change. If your D&I Strategy resembles the style and format of strategic planning documents used in your organization, your strategy is more likely to be accepted by leaders, managers, and employees as a valid planning document.

For small employers that find this all overwhelming: We recognize how challenging it can be to take on yet another initiative when you're busy trying to keep the lights on.

There are more small employers in Canada than there are large, which means there are thousands of employers trying to figure out this 'diversity thing' without dedicated resources. It's tempting to ignore the imperative (and having a D&I strategy is definitely an imperative), but if you don't act, you run the risk of losing out on a lot, and falling behind your competitors.

Never fear: it doesn't have to be that hard.

Our recommendation is simple. Use this guide to write your D&I Strategy. It doesn't need to

be a huge undertaking and you don't need a team of 15 to complete the process. We've provided you with resources and tools that should help make the process relatively simple.

We hope you enjoy and find value in our second Toolkit of 2014. We look forward to bringing you more such documents as we move forward with engaging hundreds of people across Canada in developing the solutions to our biggest inclusion challenges.

One final note: if you are making use of our Business Case or Strategy toolkits, we would love to hear about it. Please let us know if you are finding these tools useful, and if there are other tools you'd like us to develop in order to assist you and your organization on your D&I journey.

Thanks.

Michael Bach, CCDP/AP
Founder and CEO
Canadian Institute of Diversity and Inclusion
September 10, 2014

Developing this Toolkit.

The Methodology.

Like the first *Locking in your Leadership* toolkit, the contents of this document are derived from a truly collaborative effort—this time with input from over 180 professionals across Canada.

CIDI's Community of Practice ("COP") events bring together human resources and D&I or HR&E professionals, as well as people in other functions of their organizations who are dedicated to improving the inclusivity of their organizations. Participants came from public sector, non-profit, and private sector employers, and represented almost every major industry in Canada. At all our events we engage participants in tackling some of the major challenges facing us in our goal to create more inclusive workplaces in Canada.

At our COP events in January and February of 2014, we presented the results of the Diversity Business Case Toolkit, and asked participants to contribute to the second part of the process: developing a D&I Strategy.

We provided participants with some pre-reading on the basic structure of a strategic plan: the *Strategic Planning Cheat Sheet* from the *Strategic Planning Kit for Dummies.* (See link on next page.)

At the events, we assigned groups different segments of a strategic plan, and asked participants to engage in a group brainstorm and work together on crafting the components of each section of a D&I strategy such that it would be easily customizable and applicable in all types of employers – whether large or small; public, non-profit, or private sector.

Here is the recommended structure of a Strategic Plan from the *Strategic Planning Cheat Sheet*:

- Mission and Vision Statements.
- Values Statement or Guiding Principles.
- Competitive Advantage.
- Long-Term Strategic Objectives.
- Short-term Goals / Priorities / Initiatives.
- Action Items / Plans.
- Scorecard / Measurement.
- Financial Assessment.

We asked attendees if there were any sections missing, and they suggested the following aspects that could or should be included in a strategic plan:
- Critical Success Factors and Dependencies.
- Responsibilities or RACI (Responsible, Accountable, Consulted, and Informed) Matrix.

Similar to the development of the D&I Business Case toolkit, we were delighted with the level of engagement and enthusiasm amongst the participants at our COP Events.

Afterward, we had an abundance of notes from each group at each event that needed to be transcribed, sifted through, analyzed and distilled into the document before you: a template that can be picked up by anyone and used to develop a customized D&I Strategy document for your organization.

Developing a D&I Strategy.

Guidelines for Developing a D&I Strategy.

The purpose of a strategy document is to briefly explain the rationale or reason your organization needs to invest resources in a goal or initiative, and to provide more explicit direction on how you are going to achieve that goal.

While your Business Case document explained *why* you need to focus on diversity and inclusion, your Strategy document lays out *how*. As an overall framework for any strategic planning exercise, you should look at where you are now, where you are going, and how you will get there.

It should be noted that creating the actual D&I Strategy document is the final step in a relatively involved process. This cannot be done overnight. To develop an effective strategy requires significant research and preparation. The final D&I Strategy document should sum up all of that research into one succinct, well organized, easy to read document.

Again, like with the Business Case, when crafting your strategy document, it is essential that you customize the verbiage, style and tone in a way that will resonate with your workplace. Study the style and format of the strategic planning documents that are already used in your organization. The more your D&I Strategy document aligns with accepted and respected approaches, the more likely it will be accepted and implemented within your organization.

Not every section of the toolkit below may be required for your particular organization's Strategy. It's up to you to choose the aspects and format that will be most impactful for your leaders, employees and key stakeholders.

We recommend that you do not develop this Strategy alone. Even if you are the lone person in your organization who is ultimately responsible to build and implement this plan, we recommend you seek input from others within your organization. There are multiple ways to get others involved.

1. Gather your diversity champions and strike a committee specifically for developing your D&I Strategy. Ask each person to take one section of the strategy development. Set a timeline for completion of different sections and completion of the entire strategy.
2. Don't create your strategy in a bubble. Seek input, feedback, or advice from different people in the organization – from different departments, functions, or lines of business.
3. Seek input from both supporters and detractors of diversity and inclusion. It may seem counterintuitive or discouraging to seek input from detractors, but if you identify ahead of time what their objections may be, you can incorporate approaches to mitigate the problems or roadblocks your D&I efforts may encounter.

Final Note: Your D&I Strategy, like any organizational strategy, should be reviewed regularly and updated with your latest data to ensure that it is still relevant and achieving what you want to achieve.

Helpful Resources:
➔ Strategic Planning Cheat Sheet (excerpt from Strategic Planning Kit for Dummies, 2nd Edition by Erica Olsen). http://www.dummies.com/how-to/content/strategic-planning-kit-for-dummies-cheat-sheet.html

Mission and Vision Statements.

Every organization and every strategy needs a mission and vision statement. There are important distinctions between the two. The vision statement should provide inspiration, setting an aspirational goal, also known as the "big hairy audacious goal". While the vision should be ambitious, it should also be technically achievable within your organization.

Your mission statement should articulate the purpose of the strategy document. In one sentence it should encapsulate the *why* and the *how* of your strategy.

Be sure to take into account your employer's current overall mission and vision. It is best to align your D&I mission and vision with your organization's overarching mission and vision. To do this, you may consider how your D&I Strategy can build on, support, or enhance the organization's mission and vision.

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

Mission Statement:
In crafting your mission statement, look at what you want to do and how you will get there. Here are some suggestions around the purpose of a D&I Strategy that could be incorporated into your mission statement.

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

Finally, the mission and vision statements should be reviewed regularly to determine if they are still relevant. Questions to ask yourself when reviewing:
- How has it been received?
- How often is it looked at by others? (not just those of you who wrote it!)
- Is it outdated?
- Do the mission/vision and the strategy still support each other?
- Do your diversity mission/vision statements still support the overall organizational mission and vision?
- Do your diversity mission/vision statements generate broader discussion about diversity and inclusion within the organization?
- Do your diversity mission/vision statements generate discussion about the validity of the company mission?

Helpful Resources:
- ➔ Mission and Vision Statements. http://www.mindtools.com/pages/article/newLDR_90.htm
- ➔ How to Write a Mission Statement. http://sbinfocanada.about.com/od/businessplanning/a/writemission.htm
- ➔ How to Write a Vision Statement. http://sbinfocanada.about.com/od/businessplanning/a/writevision.htm

Values Statements or Guiding Principles.

The Values Statement or Guiding Principles for your D&I Strategy are your enduring, core beliefs. They're guiding precepts that never change and are part of your strategic foundation. Again, use the verbiage that's most appropriate in your organization when choosing the title for this section of your D&I Strategy document.

You should include 2 to 5 values statements or guiding principles; this is not meant to be a long exhaustive list that will cover every possibility.

Some suggestions from our COP participants of potential values statements and guiding principles are listed below:
- The culture of D&I goes deep in the organization and is more than a numbers game.
- Inclusiveness is everyone's responsibility.
- Show linkages to legislative requirements and/or organizational code of conduct.

- Aligned with organizational values and culture, values of stakeholders.
- Include components of respect, inclusion, equity.
- Identify what the values mean with examples.

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

Helpful Resources:
➔ Develop Your Value Statements for Your Strategic Framework.
http://humanresources.about.com/cs/strategicplanning1/a/strategicplan_4.htm
➔ Four Steps to Creating Principles.
http://www.makeadentleadership.com/four-steps-to-creating-principles.html

SWOT Analysis.

SWOT stands for *Strengths*, *Weaknesses*, *Opportunities* and *Threats*. In some organizations, such an analysis may be referred to as Sensitivities, Risks and Contingencies, or Strategic Considerations Analysis, or Risk vs Benefit Analysis. Again always align the verbiage in your D&I Strategy with the terminology that is currently used in your workplace.

This step was already covered in our Toolkit for the D&I Business Case. Yet, most guidelines for creating a strategy recommend completing a SWOT analysis. Therefore, if you have already completed the D&I Business Case, and have conducted a SWOT analysis, you do not need to repeat this step. For your D&I Strategy document, you should include the most salient

points from the SWOT Analysis (for the sake of those who read only the strategy and not the business case).

If you haven't already created a business case document, we strongly recommend that you do so. Furthermore, it will be especially important for you to conduct a SWOT Analysis to articulate your organization's strengths, weaknesses, opportunities and threats in the context of addressing D&I and HR&E in your organization.

At the end of this section, we provide some helpful resources on how to complete a SWOT Analysis. From our COP participants, here are some issues to consider in your SWOT deliberations:

1. Legal Frameworks:
- Business regulations/authorities.
- Employment regulations/authorities.

2. Risks:
- Operational risk. e.g., supplier/vendor efficiency and effectiveness.
- Financial risk. e.g., liability, cost.
- Reputational risk.
- Employees and volunteers. e.g., disengagement, turnover, complaints.

3. Business Benefits:
- Operational.
- Financial – return on investment (ROI).
- Reputational.
- People.
- Customers/clients/service users/patients/students.

4. Critical Success Factors.
- Consider people, processes, or approvals that may be needed or which may become roadblocks or obstacles.

Helpful Resources:
➔ Recent Research on Team and Organizational Diversity: SWOT Analysis and Implications *(Journal of Management)*. http://jom.sagepub.com/content/29/6/801.abstract
➔ SWOT Analysis: How to perform one for your organization (VIDEO). https://www.youtube.com/watch?v=GNXYI10Po6A
➔ SWOT Analysis: What, When and How. http://ctb.ku.edu/en/table-of-contents/assessment/assessing-community-needs-and-resources/swot-analysis/main

Competitive Advantage / Benefits to the Organization.

Generally, a for-profit company has competitive advantage when it can demonstrate some means of differentiating itself from competitors in a way that will create an economic impact for the company. This advantage can manifest as increased market share, increased customers, increased sales, higher levels of customer satisfaction, or increased ability to attract and retain talent, among other things.

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

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

As with all aspects of this toolkit, we recommend using the sections and the verbiage that will resonate within your organization. If the term competitive advantage is not appropriate within your organization, this section could be called Organizational Benefits.

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

Below are some suggestions of ways to frame how your D&I Strategy will contribute to organizational benefits or competitive advantage.

- War for talent: Inclusive employers are more attractive employers.
- Employee engagement: Inclusion has been linked to engagement. Disengaged employees cost money. Engaged employees provide better service, speak more favorably about your organization, go above and beyond more, and have less absenteeism and lower voluntary turnover.
- Succession planning: Invest now for your pipeline of future leaders.
- Think global: Better global picture / context for international or cross-cultural business.
- Market opportunity: Better business development opportunities in a changing marketplace.
- Mirror the marketplace: Reflect your customer, and your customer's customer.
- Breed innovation: Diversity in teams leads to increased creativity; improved products and services.
- Your brand: Set yourself apart, creating employee and customer loyalty.
- Resiliency: Increased ability to respond to change.

- Social Responsibility Requirements:
  - Sustainability/CSR reporting requirements.
  - Diversity reporting for GRI (Global Reporting Initiative) Social Indicators.
  - Social license to operate in some jurisdictions.
  - Reputation, history. Overcoming or mitigating past reputational issues, human rights, discrimination, or harassment cases.
  - Community Partnership/investment/ engagement.
  - External stakeholder perception of your organization (your image).

Helpful Resources:
- ➔ Competitive Advantage: How to Define Your Edge. http://www.inc.com/tom-searcy/redefining-your-competitive-advantage.html

Long-Term Strategic Objectives.

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

As the name suggests, Long-term Strategic Objectives should be high level objectives that will take several years to achieve—generally at least 3 years. Some organizations choose to set goals that may take 5 or even 10 years to achieve.

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

Guidelines.
Again, we recommend that you align your goal planning with the type of goal planning and strategy development that already happens in your organization. If it is common in your workplace to state long-term objectives as 5-year goals, then align to your organization's style so that your document will have more validity.

Caution: we recommend that you avoid idealistic or unrealistic long-term objectives. If they are not realistic or attainable, you're going to have difficulty gaining buy-in for your strategy. Of course, we all share the long-term objective of creating inclusive workplaces. But is it realistic to have a long-term objective such as: transform our organization into an inclusive

workplace? Is that really attainable within 5 or 10 years? And how will you measure success? Keep in mind, some employers have been on their diversity journey for over 20 years and are still struggling with inclusion issues.

Purdue University's Goals and Objectives toolkit (taken from *Strategic Business Planning for Commercial Producers)* provides two excellent frameworks for long-term goals vs short-term goals. They suggest that long-term goals DRIVE you toward your vision (see link at the end of this section).

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

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

Here are some suggested guidelines provided by our COP participants for developing long-term strategic objectives for your D&I Strategy:
- Align to your vision and business strategy.
- Focus on limited number of priorities.
- Engage all levels of the organization with input from all stakeholders.
- Review and revise periodically.
- Share and engage across the organization to foster buy-in and encourage integration in daily activities.

Examples.
Here are some examples of the potential wording of long-term strategic objectives for organizational D&I Strategies:

- 10 years – Become Industry leader on influencing D&I Best Practices.
- 5 years – Outperform D&I industry benchmarks across dimensions (LGBT, women in the workplace, visible minorities, aboriginals, people with disabilities, accessibility, etc.).
- D&I Leadership Council is accountable for driving and supporting D&I initiatives.
- Organization's overall strategic objectives/vision/mission includes D&I.
- Since D&I is a strategic imperative, appropriate budgets and resources are allocated to operationalizing the D&I Strategy.
- Develop organizational culture focused on inclusion through education and communications, using change management and culture change approaches.
- Programs will be in place to attract, retain, and support diverse groups.
- Establish mentoring and sponsorship programs.
- Attract and retain a workforce that reflects the communities we serve.
- Increase employee engagement by X%.
- Increase retention – decrease voluntary turnover by X%.
- Increase representation of (specific underrepresented groups) at X level(s) of the organization by X%.
- Succession planning and talent management process to incorporate diversity goals.
- Establish accountability measures for all leaders and people managers within 3 years, for all employees within 5 years.
- Implicit/unconscious bias training to be completed by employees at all levels.
- Create strong community partnerships with (specific community organizations).
- Create a completely barrier-free and accessible environment for all external and internal stakeholders (employees,

customers/clients/service users/patients/ students).

- Establish a central repository of information on diversity and inclusion with easy access for employees.
- Report publicly on our approach to diversity and inclusion through our public website, annual reports, CSR/Sustainability reports (if applicable), etc.
- Reduction in external/internal complaints by X (specific measure of complaints). *

Specialization.
Many larger organizations find it useful to articulate overall organization-wide long-term strategic objectives, as well as departmental/ divisional or business unit objectives. This can help people understand both the big picture, and what they need to do in their own specific area to support the overall strategy.

Helpful Resources:
- ➔ What are Long-term Objectives?
  http://www.nhcs.net/StrategicPlan/Definitions.pdf

- ➔ Goals and Objectives (by Craig Dobbins, Purdue University).
  http://www.agecon.purdue.edu/commercialag/resources/docs/goalsobjectives.pdf

* *Important note about complaints. While complaint reduction is an excellent long-term goal, employers should be prepared that after launching D&I or HR&E initiatives for the first time, there may be a short-term increase in complaints of harassment and discrimination. While it may seem counterintuitive, this is actually a good thing. It means your efforts to encourage more open discussions about diversity and appropriate behaviour are working. The result is that previously unreported toxic situations are being reported and this provides the organization with the opportunity to identify and address the situations.*

Short-Term Goals / Priorities / Initiatives.

Short-term goals articulate exactly what needs to be done to achieve the long-term strategic objectives. Short-term goals set specific, measurable performance targets that generally can be achieved within one to two years. Some organizations choose to indicate goals year-by-year. For example, if your D&I Strategy spans 5 years, and your long-term objectives indicate what you would like to have accomplished at the end of those five years, then this short-term goals section might lay out specific priorities or initiatives for years 1, 2, 3, and so on.

Guidelines:
For setting short-term goals, we suggest you use the widely respected SMART Goals framework. SMART Goals should be: Specific, Measurable,

Achievable or Agreed-upon, Realistic, and Time-bound (see link at end of this section).

Examples:
From our COP participants, here are some examples of specific short-term goals that may be adopted within organizations:
- Communicate the D&I mission/vision and strategy internally and externally.
- Implement new measures to establish baseline, gather current state information.
- Define Sponsors/Champions.
- Establish a D&I Council led by the CEO or a member of the C-suite, with representation from all divisions/departments and/or lines of business.
- Create a 'D&I lens' framework with which to re-evaluate existing policies and procedures,

and to ensure that new policies and procedures incorporate diversity and inclusion considerations.

- Develop a branding and marketing strategy around D&I.
- Establish working committee(s) to focus on specific areas of D&I.
- Develop partnerships with (specific) outside organizations that support D&I.
- Cultural competency training for all levels.
- Incorporate D&I measures into performance reviews of leaders and people managers.

One group at a COP event provided specific examples of short-term goals, with a 'what, when, who' framework.

- What: Conduct a self-identification survey.
  When: Annually.
  Who: D&I Advisor/onboarding Advisor.

- What: Raise awareness.
  When: Ongoing/ASAP.
  Who: Communications, senior leadership.

- What: Develop a D&I leadership competency.
  When: Next performance cycle.
  Who: HR, Talent Management, D&I Advisor.

Another group of participants at one of our COP events provided an excellent model for developing accountability for D&I. This model, pictured here as Figure 1, suggests that you start with available data, conduct a SWOT

analysis, gather new data, do another SWOT analysis, and so on.

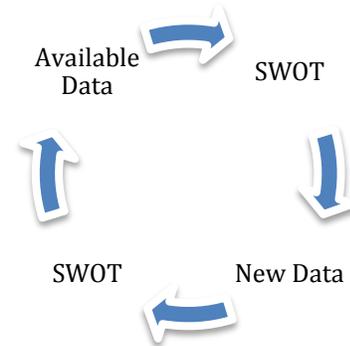They also provided guidelines on what data might be collected for this accountability model.

Figure 1: Model for Developing Accountability

Considerations for developing accountability:
- Baseline data:
  ◦ What do we measure?
  ◦ What are the roles that are available?
  ◦ What roles do we have?
- Data collected:
  ◦ Employee demographics.
  ◦ Community demographics.
  ◦ Customer demographics.
  ◦ Department demographics.

Helpful Resources:
➔ SMART Goals.
  http://www.projectsmart.co.uk/smart-goals.php
➔ Goal Setting Guide.
  http://www.goal-setting-guide.com/short-term-goals

Action Items / Plans.

The Action Items section of your D&I Strategy should contain specific statements about how the short-term goals will be accomplished with an indication of the resources required, who is responsible, and specific deadlines for each action item.

Examples:
Here are some examples from our COP participants of Action Items that could be included in your D&I Strategy. While this is not an exhaustive list, it gives you an idea of some plans that might be included. These have been listed by short-term goals with action items to support the goal beneath.

Remember, your action plans should align to your organization's own particular long-term objectives and short-term goals.

In your D&I Strategy you should flesh out these action items with more detail, specific steps, who is responsible, and deadlines.

- Facilitate a strategic discussion with sponsor(s).
  - Develop a communication plan.
  - Develop a maturity assessment model/tool.
  - Meet with the sponsor to define role and expectations, and validate the D&I Strategy.
- Education and Awareness.
  - Basic communications or training to answer "What is D&I?" and "Why D&I matters".
  - Embed D&I into communications – intranet, email blasts, town hall meetings, leaders' communications, newsletters, etc.
- Training and Development.
  - Diversity and Inclusion 101.
  - Unconscious bias training.
  - Sign language for customer facing employees.
  - Cultural competence training.
  - Embed D&I or cultural competence content into all major training currently offered (i.e., manager training, leadership training, customer service training, etc.).
- Establish and Launch D&I Council.
  - Establish accountabilities and guidelines for Council.
  - Establish list of potential members.
  - Ask sponsor to invite potential members to be part of Council.
- Sub-Committees.
  - Establish D&I Council sub-committees focused on specific strategies, goals, functions, or lines of business.
  - Establish who will be on sub-committees, how often they will meet, what they will be accountable for, and by when.
  - Identify tools and resources (needed vs. have).
- Launch Employee Resource Groups (ERG's).
  - Establish framework for how ERG's will run in your organization with guidelines, approval mechanisms, budgets, etc.
  - Develop communication plan for rollout of ERG's.
- Develop Resource Guides.
  - Accessibility.
  - Recruiting.
  - Hiring and onboarding.
  - Inclusive language guidelines.
- Review or develop policy and procedures.
  - Benefits.
  - HR policies and procedures.
  - Accommodation.
- Talent management strategy.
  - Establish specific goals for recruitment from under-represented groups.
  - Review recruitment/interview processes for potential exclusion/barriers.
  - Provide cultural competence training to recruiters and hiring managers.
  - Provide accessibility training to recruiters and hiring managers.
  - Review performance appraisal process.
  - Review job descriptions through inclusion lens.
- Develop community engagement approach.
  - Establish relationships with outside organizations dedicated to specific segments.

Measurement may be one of your action items, or you may consider having a completely separate section dedicated to measurement.

For greater clarity, many organizations choose to present short-term objectives, action items, and measurements in a table or matrix framework.

Scorecard / Measurement Frameworks.

Measurement should be a consideration for every short-term goal and action item you have. Every time you establish a goal or action item, you should include how you will measure the achievement of that goal.

We recommend creating a formalized diversity scorecard that aligns with your organizational scorecard, dashboard or suite of management reports. Again, like in all other aspects of your D&I Strategy and Business Case, it is best to align with established frameworks in your organization to ensure acceptance and buy-in. However, when talking about D&I it may be necessary to encourage your organization to start measuring things they have never measured before.

If you need support with measurement, please see CIDI's research report *What Gets Measured Gets Done: Measuring the ROI of Diversity and Inclusion* which provides a toolkit for establishing or improving diversity measurements. We also strongly recommend the Assessments, Measurements and Research section of the Global Diversity and Inclusion Benchmarks (see links at end of this section).

As we discussed in our report *What Gets Measured Gets Done: Measuring the ROI of Diversity and Inclusion*, the first step for any organization interested in improving diversity and inclusion is to measure the demographics of the workforce, and if possible, the demographics of the organization's customers/ clients/service users/patients/students.

Guidelines:
Although it can be easier to track activities and numbers, it is more compelling to measure impacts or outcomes. For example, many organizations will report items like this: *450 employees attended diversity training*. That is

interesting and it is indeed a measurement, but it doesn't answer the question: *what was the impact of the training?* Was there a change in attitudes, perceptions, or behaviours of the participants? Were there corresponding impacts in other areas of the organization? As much as possible, we recommend that you incorporate *impact* measurements in addition to *activity* measurements.

It should also be noted that measurements should be both *quantitative* and *qualitative*. We need both hard numerical facts as well as anecdotes and stories to help convey where an organization is on its diversity and inclusion journey.

The list below are some suggestions from our COP participants on ways to measure. There is a more exhaustive list of standard measures in our report *What Gets Measured Gets Done: Measuring the ROI of Diversity and Inclusion*.

Again, we cannot stress enough that measures should be linked to action items, short-term goals, and long-term objectives.

Examples of Internally-Focused Measures:
- Employee demographics (gathered through self-identification survey).
- Hiring rates vs. objectives per group.
- Recruitment, retention, advancement, attrition scorecard by demographic.
- Employee engagement by demographic (and specific inclusion questions analyzed by demographic).
- Tracking of D&I training for managers and employees.
- Impact of D&I training on attitude and behaviour change.
- Measures of cultural competence for leaders and/or employees.
- Internal member/employee surveys.

- Focus groups.
- Exit interviews.

Examples of Externally-Focused Measures:
- Demographics of customers/clients/service users/patients/students.
- Churn or retention rates of customers/ clients/service users/patients/students by demographic.
- Customers/clients/service users/patients/ students satisfaction or engagement by demographic.
- Candidate demographics.
- Media exposure and social media mentions related to D&I.
- Community surveys (most effective with ability to analyze by demographic).
- Partnerships with community organizations.

- ROI of marketing to specific demographic segments.
- Percentage of spend with diverse vendors.

Helpful Resources:
- ➔ What Gets Measured Gets Done: Measuring the ROI of Diversity and Inclusion (CIDI Report). http://www.cidi-icdi.ca/what-we-do/think-tank/research/measurement/
- ➔ Global Diversity and Inclusion Benchmarks. http://diversitycollegium.org/downloadgdib.php
- ➔ Measuring Diversity. http://www.dop.wa.gov/diversity/DiversityManagement/Pages/MeasuringDiversity.aspx

Financial Assessment.

Financial Assessment might be incorporated with the measurement frameworks section of your D&I Strategy or might be listed in a separate section, depending on what is most appropriate within your organization.

In the financial assessment phase of your strategy, you should define the cost of implementation of D&I Strategy, as well as analyze the potential costs and risks to the organization for not doing so. Further, you should calculate the return on investment (ROI) of your D&I initiatives.

The Diversity Scorecard is an excellent book by Dr. Edward Hubbard that provides step-by-step instructions on how to measure ROI on the cost associated with any diversity initiative (see link at the end of this section). Dr. Hubbard contends that the ROI on diversity initiatives is greater than that of almost any other initiative that could be undertaken by an organization.

Some suggestions from our COP participants on financial assessment included considerations of both cost reductions and increased revenues.

Examples of cost reductions:
- Lower turnover rate through increased employee engagement.
- Reduced cost of absenteeism, disgruntled employees, sick leave, poisoned workplace.
- Reduced cost of harassment complaints, tribunals, civil suits, etc.
- Engaged employees are more productive. Disengaged employees cost organizations money. (It has been estimated that each disengaged employee costs the company $10,000. Source: Aon Hewitt 2010.)

Examples of increased revenue:
- Improving sales by adapting products and services to new markets.
- Reaching new markets through having community members on staff.

- Innovation leading to new products or services.
- Shareholder value.

Critical Success Factors and Dependencies.

Critical Success Factors and Dependencies may vary by organization. However, one of the biggest dependencies for any major initiative is ensuring sufficient resources are allocated for successful execution.

Some of the major critical success factors identified by our COP participants are listed below:
- Leadership buy-in of Business Case and Strategy.
- D&I must become embedded in business/organizational strategies, not just an 'HR thing'.
- Appropriate funds and human resources dedicated to rollout, and ongoing management.
- Cascade strategy throughout organization with accountability for the silent middle; tie to individual goals

- Process for review and readjustment.
- Flexibility to foresee or respond to trends in real time.
- Communications as part of a broader change management plan with clear understanding of why.

Creating a RACI Matrix.

A RACI Matrix is a responsibility assignment matrix, a common tool used in project management. RACI is an acronym that stands for Responsible, Accountable, Consulted, and Informed.

When implementing complicated strategies and projects, it is rare that everyone understands the roles and responsibilities of everyone else involved in the project.

Without clearly defined roles and responsibilities, confusion can arise and things can slide. You don't want to get into the 'I

thought you were doing that' scenario. Creating a RACI chart helps to provide clarity around roles and responsibilities.

Responsible: The person who does the work to achieve the task. They have responsibility for getting the work done or decision made. As a rule this is one person; examples might be a D&I manager or equity advisor, a human resources manager, people from communications, marketing, sales, or talent management, etc.

Accountable: The person who is accountable for the correct and thorough completion of the

task. This must be one person and is often the project executive or project sponsor. This is the role that 'Responsible' is accountable to and approves their work.

Consulted: The people who provide information for the project and with whom there is two-way communication. This is usually several people, often subject matter experts.

Informed: The people who are kept informed about progress and with whom there is one-way communication. These are people that are affected or impacted by the outcome of the tasks so need to be kept up-to-date.

➔ How to Create RACI Matrix. http://www.projectsmart.co.uk/raci-matrix.php
➔ Alternate RACI Chart Variations. http://www.brighthubpm.com/templates-forms/53552-constructing-a-raci-matrix/#imgn_1
➔ Downloadable RACI Chart Templates. http://racichart.org/

Wrap Up.

Our mandate at the Canadian Institute of Diversity and Inclusion is to assist Canadian employers in creating more inclusive workplaces.

We've developed both the D&I Strategy and Business Case toolkits because we firmly believe that both are critical components on your organization's D&I journey, and are absolutely required to make progress toward your goals.

You need the Business Case to gain leadership buy-in for your organization's Diversity and Inclusion, or Human Rights and Equity endeavours. It explains why you need to focus on it.

You need the D&I Strategy to provide a roadmap for everyone in your organization to understand what needs to be done to help you move you toward becoming a more inclusive organization.

To drive change, your organizational leaders need to be advocates and champions of D&I and HR&E. Providing your leaders with comprehensive, well-crafted business planning documents backed by research and data will help immensely with getting them to support these endeavours.

We hope that the tools we have provided in this document are valuable and useful in helping you gain that support, delineate a winning strategy and support your business case.