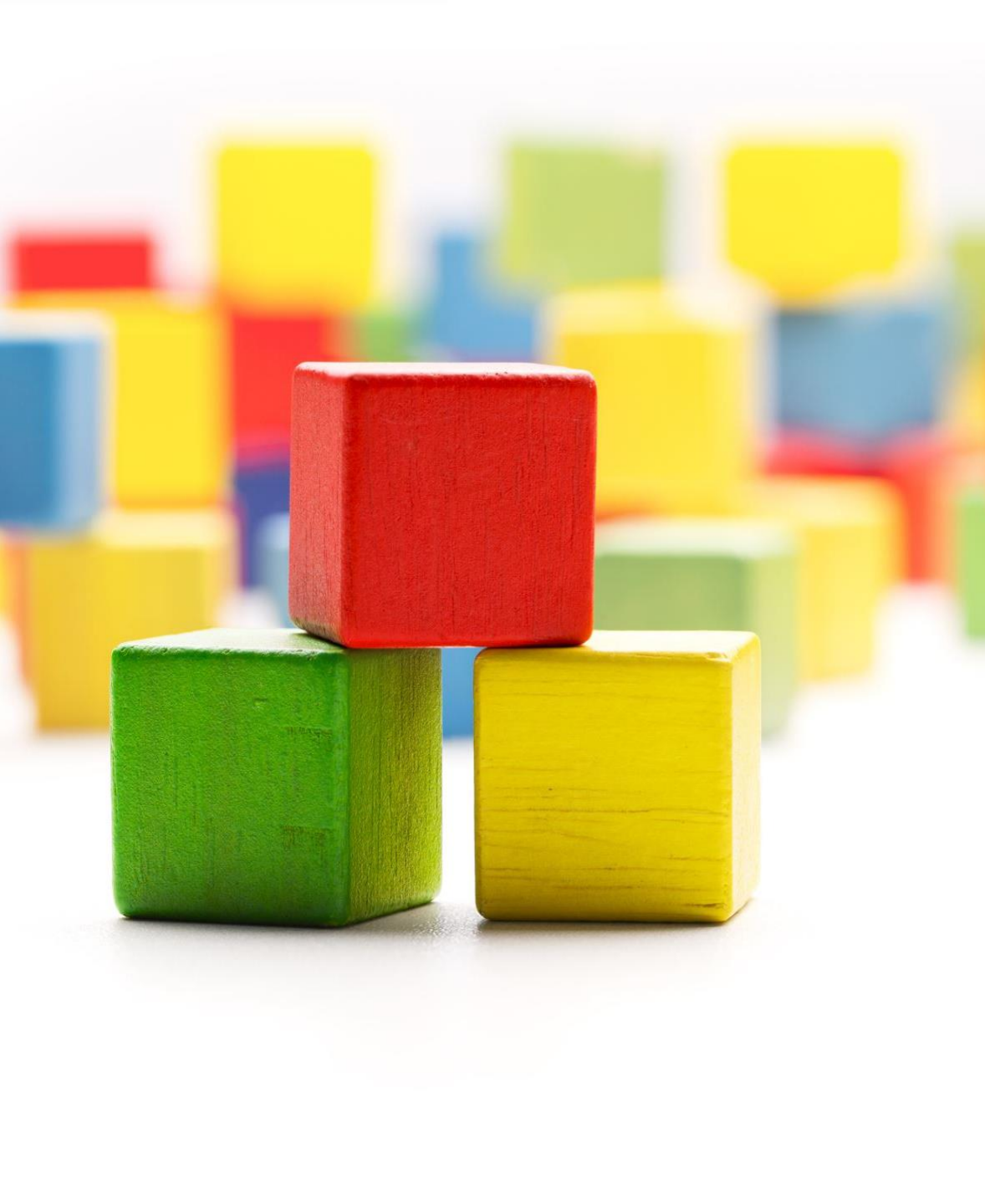




# Creating a Stronger Inclusive Workplace

Presented by  
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Business + Trust & Investment Conference



# Agenda

- Welcome and Session Expectations
- Role of Banking in Diversity, Equity & Inclusion (DEI)
  - ❖ Business Case
  - ❖ Laying the Foundation
- Building Blocks to: (DEI)
  - ❖ Diversity
  - ❖ Equity
  - ❖ Inclusion
- Inclusive Leadership
- What's TOP of MIND for you?
- Employee Resource Group
- Your Opportunities - takeaways

# The Role of Banking in Diversity, Equity & Inclusion (DEI)

“Banking has transformative power to contribute to a more equitable, inclusive and just society”

According to the ABA, “equitable and fair access to financial services improves a country’s overall welfare because it enables people to thrive and better manage their needs, expand their opportunities and improve their living standards”

# Business Case for Diversity, Equity & Inclusion (DEI)

Drives innovation

Brings in diverse perspectives that lead to more creative problem solving

Enhances talent recruitment and retention

Improves employee engagement

Organizations with more diverse teams and leadership tend to outperform industry peers

# Banks' Opportunities to Maximize Diversity, Equity & Inclusion (DEI)

Workforce Diversity,  
Talent Acquisition and  
Retention

Policies and Procedures

Board Governance

Products and Services -  
Delivering to a diverse,  
historically  
underrepresented  
customer base



# Title VII

## Laying the Foundation

### Title VII of the Civil Rights Act of 1964

Unlawful employment practice for an employer to fail or refuse to hire or to discharge any individual, or otherwise to discriminate against any individual with respect to his compensation, terms, conditions, or privileges of employment, because of such individuals “protected class status”, i.e., race, color, religion, sex, or national origin



# Americans with Disabilities Act (1990)

Act established comprehensive national mandate for the elimination of discrimination against individuals with disabilities

## Laying the Foundation





## Dialogue - Name that Policy

Take 5 minutes at your table to list the laws, rules and regulations that you are familiar with that impact the workforce.....from how you hire to how you train and promote

Identify someone at your table who can take notes and report out





# DIVERSITY

What does Diversity mean to You  
as a Building Block to Inclusion?

# Dimensions of Diversity



The four dimensions of diversity:

1. Personality
2. Internal
3. External
4. Organizational

Source: A model developed by Lee Gardenswartz and Anita Rowe in 1991 and revamped in 2003.



Creating an  
Inclusive Culture

# WHAT ARE THE DIFFERENCES BETWEEN THE TWO IMAGES?



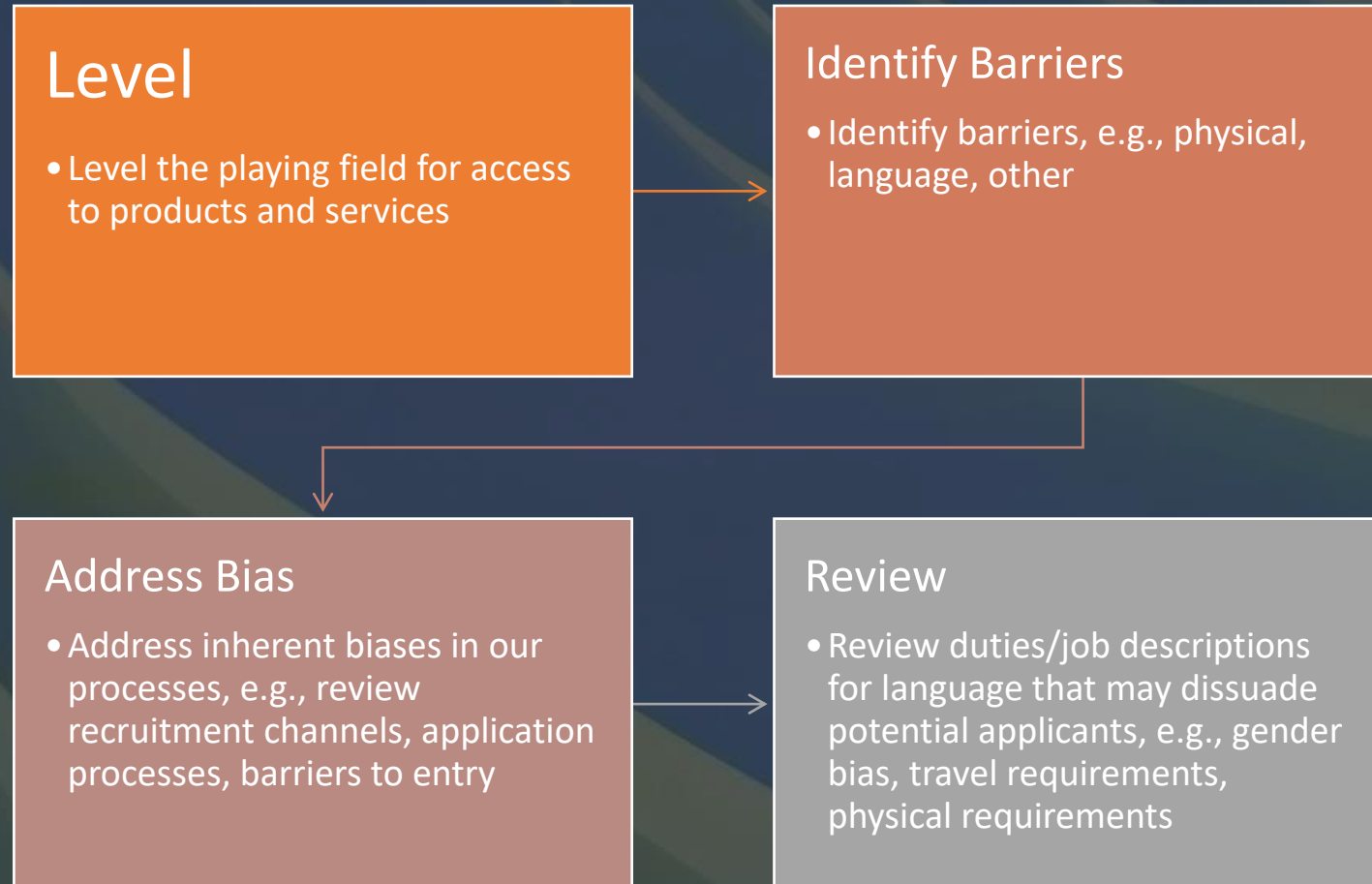
## EQUALITY

When everyone gets or has access to the same

## EQUITY

When everyone gets what they need

# What are some actions you can take to create a more equitable environment?





## Ensure Equity

What are some of the ways this shows up in organizations?

- ✓ Gender equality issues
- ✓ Pay Equity
- ✓ Gender neutral restrooms
- ✓ Access for individuals with disabilities
- ✓ Other...



# Inclusion

The Next Building Block in  
Diversity, Equity & Inclusion

# What is Inclusion?



Creating a sense of belonging, feeling valued by the organization and contributing while being your authentic self



# Inclusive Leadership...

Critical to fostering an environment that is in constant pursuit of valuing and engaging all perspectives for the benefit of the organization

When thinking of **belonging**, it's important to move from all are welcomed here to **this was created with you in mind**.

Crystal Jones, PhD

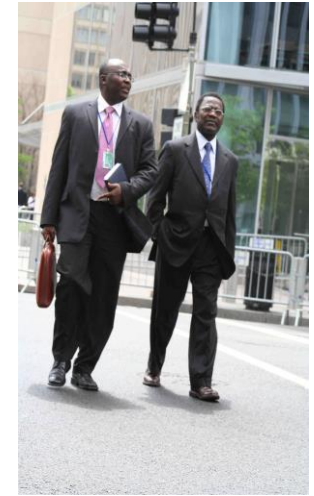


# What is Inclusive Leadership?

- ✓ LEADERSHIP THAT VALUES TEAM MEMBERS
- ✓ INVITES DIVERSE PERSPECTIVES
- ✓ CREATES AN ATMOSPHERE WHERE PEOPLE FEEL THEIR OPINIONS AND THEIR CONTRIBUTIONS IMPROVE THE COMPANY'S WELL-BEING."



# Diversity, Equity & Inclusion Recap



**D**

## DIVERSITY

- *Representative workforce to include gender, race, ethnicity as well as other dimensions; Reflect diversity of communities where services are provided*

**E**

## EQUITY

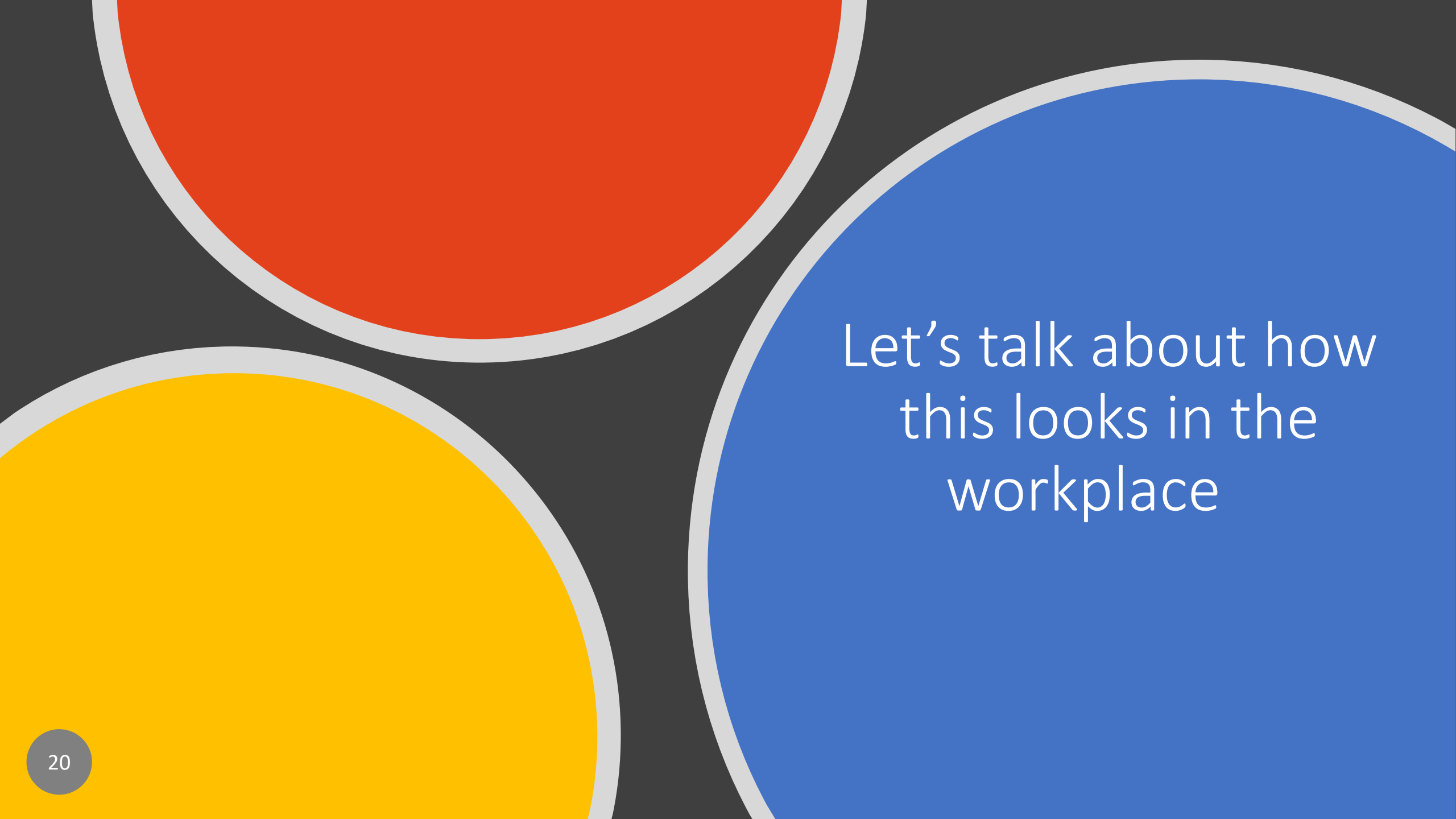
- *Leveling the Playing Field for Everyone; ensuring that everyone gets what they need to succeed*

**I**

## INCLUSION

- *Leveraging the power of individual uniqueness to achieve business objectives; Understanding, Respecting and Valuing all human differences to unlock employee's full potential*





Let's talk about how  
this looks in the  
workplace

Who is in the  
Workforce?

Who is Gen Z?

- 51% White
  - 25% Hispanic
  - 14% Black
  - 5% Asian
- 29% of Gen Zers are children of immigrants or immigrants themselves
  - More likely to have grown up in families that are diverse and are “less fazed by differences” in terms of race, gender identity, sexual orientation

\*Gen Z – those born after 1997

# Being an Inclusive Leader is for Everyone

## 5 Ways to Practice Inclusion:

1. Be transparent in your processes and decision making
2. Invite in diverse opinions, acknowledge and value each person's contribution
3. Create a safe space for all to contribute
4. Embrace the change from a "command and control" approach to one that is collaborative
5. Be aware of who is not in the room or at the table
6. Seek out ways to connect with those who are underrepresented

# The Role of Employee Resource Groups (ERGs)

- ✓ Driven by employee interests
- ✓ Create a safe space
- ✓ Build a sense of community
- ✓ Identify organizational blind spots and recommend solutions
- ✓ Minimize feelings of isolation
- ✓ Provide space to share lived experiences that enhance understanding, empathy, camaraderie

# Characteristics of Employee Resource Groups (ERGs)

- ✓ Employee led
- ✓ Partnered with an executive sponsor who can help to support the goals and activities of the ERG
- ✓ Work with the company's Chief Diversity Officer to ensure alignment with overall DEI strategy
- ✓ Bring together employees of a shared background and/or experience who can provide ideas on ways to positively impact the culture of the organization, highlight issues of concern and offer solutions
- ✓ Help to further educate the workforce on issues that are of importance to diverse employees, e.g., cultural and holiday observances, social and racial justice issues
- ✓ Collaborate with HR on talent acquisition and retention strategies



# Ground Rules for a Successful Employee Resource Groups (ERGs)

## Be an Active Listener



Practice Vulnerability

### *Vulnerability*

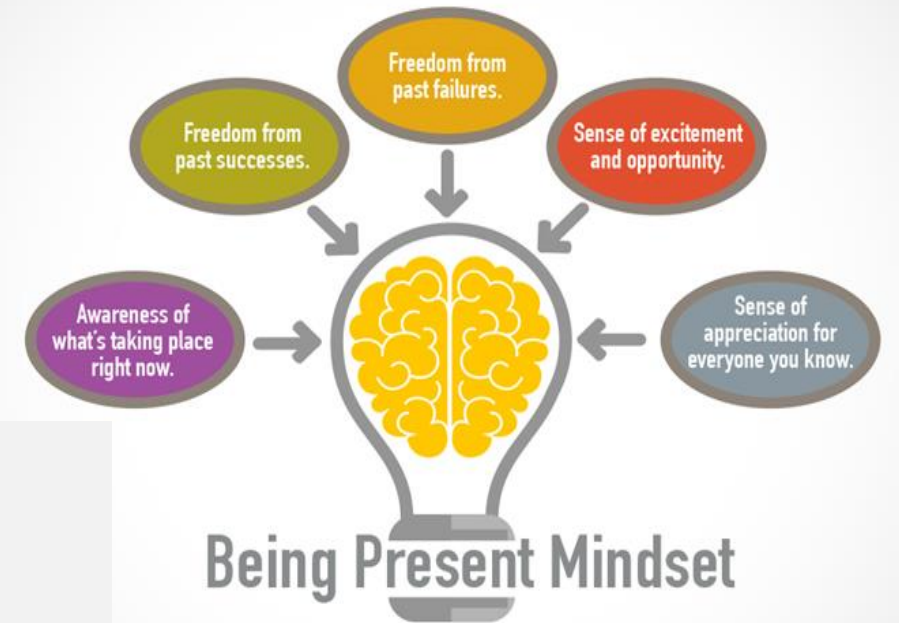
The **Willingness** to show up

And **Be seen** with


No Guarantee of Outcome

# ERGs

## Be Present



## Being Present Mindset



Since 2020, ERGs have become an important way to engage with remote employees as well as introduce new employees to the culture of the organization

# What can you do?

As an individual

As an organization



My Inclusion Champion

# Opportunities

- Institutionalize processes that:
  - Address biases in hiring
    - Blind applicant resume review
    - Standardized interview training and procedures
    - Review job descriptions to remove gender-specific language
  - Ensure diverse perspectives in interview and selection committees
  - Develop standardized procedures for ranking candidate against specific selection criteria
  - Periodically evaluate effectiveness of process

**We don't see things as  
they are**



**We see things as  
we are**