Diversity, Equity, & Inclusion

For dummies®

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- Create a culture of inclusion for your workplace
- Integrate inclusive recruiting, interviewing, and hiring practices
- Develop, lead, and sustain DEI change initiatives

Dr. Shirley Davis

Global workforce expert and DEI thought leader

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by Dr. Shirley Davis

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Introduction

Welcome to *Diversity, Equity, and Inclusion For Dummies.* As I write this, the timing for this book couldn't be more perfect given the predictions about the workplace of the future. I can't tell you what an honor is to write the first-ever book of this type in this series. I'm Dr. Shirley Davis, and I've spent over 30 years in Human Resources and as a Chief Diversity and Inclusion Officer, a corporate executive, and now a global workforce consultant. I believe that all my experiences (both professional and personal) have prepared me to contribute this body of work.

Since the 2010s, the global workforce, marketplace, and communities have undergone significant demographic shifts, making workplaces more diverse than ever before. And research reveals that this trend will continue. Diversity, equity, and inclusion have taken a front seat for organizations seeking to capitalize on new talent — more women, greater ethnicity, five generations, and different abilities, backgrounds, experiences, thinking styles, beliefs, and ways of working — and build world-class cultures. They recognize that in order to attract, engage, and retain top talent and new customers, clients, and members, they must have strong leaders who can work effectively across differences, and they must foster a work environment where *all* talent enjoys a sense of belonging and inclusion and has an equal opportunity to succeed.

Most organizations aren't there yet, though, and most leaders still aren't comfortable or knowledgeable about diversity, equity, and inclusion. Transforming a rigid, hierarchical, and homogeneous culture to a world-class one can take years. The same goes for developing inclusive, first-rate leaders. But you can get there with intentionality and a commitment of time, effort, and resources. And trust me; this new generation of top talent is demanding it.

So leaders at all levels (from the boardroom to the C-suite to the mid-level supervisor) have a unique opportunity right now to embrace these new realities. You can begin by first developing the skills, competencies, and behaviors needed to lead effectively across differences. Then you can start implementing the proven strategies that position your organization to be an employer of choice and a great place to work and do business.

About This Book

Diversity, equity, and inclusion (DEI) work can't be a nice thing to do or a check-the-box exercise that provides a temporary fix until the cameras go away and the noise is quieted. True and sustainable culture transformation requires bold, innovative, and courageous leadership, long-term commitment, and accountability.

Diversity, Equity, and Inclusion For Dummies is the one-stop resource guide you need to get a comprehensive understanding of what this work is all about, how it contributes to the organization's success, what your role is as a leader, and how to implement DEI in every area of your organization. In this book, I explain everything from the common terminology to the continued evolution of DEI to how the demographics continue to change, plus strategies for tasks like the following:

>> Sourcing and recruiting diverse talent and growing the skills to lead a diverse workforce

>> Assessing your organization's current culture and cultivating and sustaining one of inclusion, equity, and belonging

>> Making the business case for DEI and addressing the obstacles to DEI

>> Aligning DEI with your strategic priorities and creating a DEI strategic plan

>> Measuring the success of your DEI efforts

>> Launching DEI councils and employee resource groups

In this book, I share from my 30-plus years of experiences, proven strategies, and results achieved as a human resources veteran and a former chief diversity, equity, and inclusion officer for several large global organizations. I also share from a personal perspective as someone who personally experienced being marginalized, oppressed, discriminated against, overlooked, and undervalued in my rise to the C-suite. And what I've come to realize is that my stories are still the reality for so many workers today who report that they're experiencing these same things in their workplaces and from their leaders.

I also understand the value of building a diverse team and capitalizing on the different perspectives, experiences, and talents of that team (to which I dedicate Chapter 11). So I modeled this mindset and sought out three other DEI thought leaders, researchers, and educators to contribute to this body of work so that it offers even broader and more comprehensive tips, strategies, and proven practices.

One person, whom I've known and worked with in DEI and implicit bias for ten years, brings a unique perspective as a young, white, gay, male educator and consultant who grew up all over the world as the child of a military family. Another contributor identifies as an African American, cisgender, heterosexual, Christian. She holds a PhD and is a college professor and practitioner of leadership development, DEI, and HR, and she came highly recommended through my network. And so did my third contributor, a 70-year-old, white, Jewish, LGBTQ woman from the Bronx in New York. And because of this diverse team of contributors, the final product is much better.

This book contains answers to the many questions that leaders ask and the plethora of concerns and misnomers that exist, and it demystifies DEI to make it practical, understandable, and implementable. It speaks directly to middle managers and leaders at the top who may not have the title of chief diversity and inclusion officer but do have the responsibility to lead diverse teams; recruit, hire, and develop diverse talent; serve diverse customers; and foster a welcoming, inclusive, and high-performing workplace culture. In other words, all leaders at all levels can benefit from this book.

What this book isn't: It isn't meant to represent the views, experiences, and practices of all DEI thought leaders around the world. That's the point of this book and the beauty of this work. Everyone brings different lenses, models, frames of reference, and unique experiences that inform their decisions. This book is also not designed to be a prescription for implementing the strategies and tips in the same way. Every organization is at (and in) a different place, working at a different pace, and has varying degrees of resources, complexities, and levels of commitment. Therefore, this book isn't a one-size-fits-all reference guide. Use to find information, ideas, and guidance for where you are and to help you get to where you want to go on your DEI journey. This book is only one source; I refer to many others throughout the book that can supplement your development.

I also want to quickly point out a few things that may help you better navigate and use this book:

- ❯❯ Whenever I introduce a new important term in a chapter, I place it in *italics* and follow with a quick definition or explanation.

- ❯❯ Keywords and action steps in lists appear in **bold.**

- ❯❯ Sidebars (look for the gray shaded boxes) feature content that is interesting and informative but not essential to your understanding of a topic. If you're wanting to get in and out quickly, you can safely skip them.

Foolish Assumptions

I know what they say about making assumptions, but for the sake of this book I did make a few of them so that I could best serve your needs. I assumed the following:

>> You're working at an organization in a manager or leader role.

>> You recognize that the world of work is changing demographically, and you want to better understand it.

>> You have little or no knowledge and experience in leading DEI initiatives and want to pick up the fundamentals.

>> You may have reservations and discomfort about DEI. You may even wonder why it's getting so much focus.

>> You want to develop into a more effective and inclusive leader.

Icons Used in This Book

Throughout this book, you find icons that help you pick up what I'm laying down. Here's a rundown of what they mean:

This icon alerts you to helpful hints. Tips can help you save time and avoid frustration before, during, and after your transition out of the military.

This icon reminds you of important information you should read carefully.

This icon flags actions and ideas that may cause you problems. Often, warnings accompany common mistakes or misconceptions people have about the transition process.

Beyond the Book

This book contains lots of ideas, strategies, checklists, tools, resources, references, best practices, and other sources that give you more than enough to work with. But there's more! It includes an online Cheat Sheet that provides guidance and tips for spotting and dealing with common DEI barriers, a list of questions to test your cultural competence, and ways to help employee resource groups (ERGs) success so that they can, in turn, help aid your DEI efforts. To access this handy Cheat Sheet, go to dummies.com and type **Diversity, Equity, and Inclusion For Dummies Cheat Sheet** in the search box.

Additionally, if you, your team, or members of your organization need DEI training, coaching, a keynote speaker, or consulting on any of the processes I share in this book, or want to obtain a certificate in DEI, you can access information on my website at `www.drshirleydavis.com`. You can also access a number of free resources as well.

Where to Go from Here

I hope reading this book make you more informed and inspired to become an inclusive leader. I hope that it answers questions you have, clears up any confusion about DEI, and gives you a greater appreciation for the complexity and necessity of this work.

This book isn't linear, so how to move forward depends on you and where you are. But Chapters 1 and 2 will get you off to a great start; they set the foundation for really understanding DEI. Feel free to use the Table of Contents to skip around and use the book to meet you right where you are. One day you may need to know how to establish a DEI Council. If so, go to Chapter 14. Another day you may need to know how your organization goes about hiring a more diverse talent. Head over to Chapter 9. And when you want to know how to articulate the business case for DEI refer to Chapter 4.

You're not expected to become a DEI expert. There are those of us who hold that title. Nor do you have to hold a DEI title in order for you to do great DEI work in your organization. I do hope you sharpen your skills and apply what you read here so you can help those experts help you. Take the time to internalize the information. Be honest with yourself, but also cut yourself some slack. Realize that DEI is a learning process and a journey, and you won't get it right overnight. Make a commitment to change some behaviors and attitudes along the way that you know could be wreaking havoc on an employee's experience. Strive to be that leader that everyone wants to do their best work for because they feel valued, respected, and included.

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Getting Started with Diversity, Equity, and Inclusion

Examine how diversity, equity, and inclusion have evolved from a nice-to-do and compliance-driven activity to being a key driver for achieving a competitive advantage. Explore common terminology and the multiple dimensions of DEI.

Uncover the changing workforce demographics and their effects in the workplace.

Recognize the skills and competencies that every leader should have in order to lead the new generation of talent.

Describe the business case for DEI and the many benefits it offers in the workplace.

Identify the benefits and logistics of hiring a chief diversity, equity, and inclusion officer.

Chapter **1**

Understanding the Fundamentals of Diversity, Equity, and Inclusion

I f you chose to pick up this book, chances are you realize that the workforce is changing, and if you want to remain relevant, competitive, and successful, you and your organization must change too. By now, you've seen or heard how the demographic shifts have already reshaped the workplace, and you recognize that as a leader you must embrace and value diversity more readily, adopt new ways of thinking and working with people who are different from you, and assess your own attitudes and behaviors that can impede workers' experiences. Likewise, organizations recognize that they must foster the kind of work environment that attracts top talent and creates a safe, respectful, and inclusive culture where all talent can succeed and where people want to stay.

This is not a passing fad. The work of diversity, equity, and inclusion (DEI) has been evolving over the past 40 years and continues to expand today in terminology, practices, strategies, and its effects. As such, no one can tout that they know everything there is to know about DEI. I have been in this work for more than 30 years, and I'm still learning new things today. What I can surmise from my experience is that every leader is at a different stage and phase of this work. I've met people who have been on the journey as long as I have and still feel ill-equipped. They've had stops and starts along the way but need to go deeper. I've met some who just recently started their journey (as a result of the George Floyd murder), and they ask the question, "Why didn't I see this before?" referring to the history of inequities, social injustice, and the many aspects of diversity. I've met people who have been advocating and practicing this work for decades and still believe there is a long way to go. And yes, I still meet people who don't see the value of DEI work and believe that it's a distraction in the workplace, and that they have no role to play in implementing it. And this is part of the journey as well. We all see the world differently based on our own upbringing, experiences, beliefs, and values. What's interesting is that I also work with organizations and clients whom I find at these exact phases and stages too.

Re-Shifting the Focus to Diversity, Equity, and Inclusion Work

I write this book at a time when the world is facing some of the most unprecedented and disruptive events in modern history. Throughout 2020 and 2021, life as the world knew it changed dramatically because of the COVID-19 global pandemic. In early 2020, in a matter of weeks and with little time to prepare, schools were forced to shut down, sending millions of kids home to learn entirely virtually. Businesses were required to close offices and send employees home to work; many companies went out of business permanently, leaving millions of people without a paycheck. All public modes of transportation, such as air travel, transit railway systems, taxis, and rideshares, experienced record-low ridership. And the list goes on. Daily life had been upended in ways that were unexpected and unlike anything people had ever experienced.

You may ask "What does this global pandemic have to do with diversity, equity, and inclusion?"

A lot. Contrary to earlier assertions that COVID-19 was the great equalizer, it turned out to be the great revealer. It exposed and exacerbated longstanding and widespread disparities and inequities in healthcare, education, employment, and socioeconomics. Here are just a few examples:

>> When the world had to shelter in place and work from home, those most affected with job loss were essential workers (Black and brown people, and women) whose jobs couldn't be performed remotely (for example, workers in restaurants and hotels, bus drivers, cleaning personnel, warehouse and manufacturing workers, and so on). And a lack of resources, such as Internet/Wi-Fi or a computer, had an adverse effect on others' ability to work from home or for their children to learn virtually.

>> Caregiving responsibilities brought on by school and childcare closures and an increased need to care for sick and elderly family members fell mostly to women. Additionally, women were far more likely than men to be furloughed or terminated altogether.

>> Black and brown people were also some of the demographics hardest hit by the pandemic, with higher death rates due to disparities in access to health-care and treatment.

>> Poverty levels rose significantly during the pandemic, exposing food shortages around the world. Nearly 1 billion people in the world went hungry in 2020, according to the UN report on the *State of Food Security and Nutrition in the World.*

While the global pandemic was devastating millions, another major event of 2020 that I believe will go down in the history books as a tipping point and defining moment in DEI work was the murder of George Floyd. The world watched this unarmed Black man in Minneapolis, Minnesota, being murdered at the hands (or in this case, the knee) of a white police officer on May 25, 2020. With much of the world under stay-at-home orders and able to watch the news coverage replay it over and over for weeks, the event sent shockwaves and launched protests reaching all seven continents.

For me and my DEI colleagues who have been in this work for a long time, we felt the sense of urgency like never before. It was as if we had been thrust to the front lines overnight. For years, we had been hoping for senior-level officers to place a greater focus/priority on DEI work because we observed too many companies becoming complacent; reverting to old ways and habits of being exclusionary and oppressive; and showing a blatant disregard for diversity, equity, and inclusion. We saw how divided and polarized the world was becoming, and our hearts were breaking while wondering whether the years of implementing DEI strategies were all in vain.

But nothing could've prepared us for *how* this re-shifting would happen. George Floyd's murder, along with those of several other unarmed Black people that occurred just a few months earlier (such as Ahmaud Arbery and Breonna Taylor in February and March, respectively), received international news coverage. It changed our collective focus and raised the national consciousness to the racial

inequalities, biases, and prejudices that have existed throughout history. Immediately following the murder of George Floyd, my firm and many others in DEI consulting were inundated with requests to consult with CEOs, presidents, and public relations and communications directors on crafting both public-facing and internal statements of commitment (and recommitment) to fighting injustices and inequities and creating cultures of inclusion and belonging.

My team and I conducted well over 100 listening sessions, focus groups, and staff town hall meetings within a ten-month period and administered countless inclusion and engagement surveys, DEI audits, and training programs on a range of topics such as DEI fundamentals, implicit bias, how to have courageous and impactful conversations, recruiting and building a diverse pipeline, building cultural competence, and cultivating cultures of inclusion and belonging. And for many of us, the demand hasn't slowed down.

And I anticipate that it won't, given the current and impending challenges we face. Leaders around the globe are grappling with the mental toll, the psychological trauma, and the stresses and fatigue felt by workers at all levels. And these effects from the COVID-19 pandemic, the exposed injustices and disparities, and the uncertainty of the economic recovery will be felt for years to come. Additionally, this book is timely and relevant (and, I would add, overdue) with the expected demographic shifts over the next decade, the complexities of working in a global marketplace, the continued advancements in technology that are redefining the way people work, the new kinds of skills that will be needed, and the ongoing war for top talent.

REMEMBER Re-shifting focus to diversity, equity, and inclusion work in times like these not only makes good business sense but also is necessary for creating a new and better world — one that recognizes humanity, celebrates diversity, and makes equity and inclusivity the reality. Diversity, equity, and inclusion should be a priority in every organization and a required responsibility of every leader.

Understanding the History of Diversity and Inclusion in the Workplace

Diversity, equity, and inclusion work isn't new. Human and civil rights movements and laws date back centuries, but understanding the historical context and the many ways that it has evolved over the years is important. This section brings to light the historical societal events that have greatly influenced the diversity, equity, and inclusion shift in the workplace and other institutions.

The Magna Carta (1215), the English Bill of Rights (1689), the French Declaration on the Rights of Man and Citizen (1789), and the U.S. Constitution and Bill of Rights (1791) are the foundations of a long history of the fights for human and civil rights. When they were originally translated into policy, they excluded women, people of color, and members of certain social, religious, economic, and political groups. The Universal Declaration of Human Rights (UDHR) was adopted by the 56 members of the United Nations in 1948, establishing human rights standards and norms.

Since then, more historical events have significantly influenced civil and human rights across the world. In turn, they've brought about awareness to the importance of diversity and inclusion practices in the workplace and beyond:

- **1960 — Sharpeville Massacre (South Africa):** In Sharpeville, South Africa, police fired on a group of Black people participating in an anti-apartheid demonstration without provocation.

- **1963 — March on Washington (United States):** Dr. Martin Luther King Jr. delivered his world-famous "I Have a Dream" speech at the March on Washington. In the speech, Dr. King called for civil and economic rights and an end to segregationist policies and racist acts.

- **1964 — United States Civil Rights Act (United States):** This landmark policy put into law the prohibition of discrimination based on race, color, religion, sex, or national origin. It also banned racial segregation in schools, employment, and public entities and unequal voter registration requirements. This act has been amended to include those with disabilities and the LGBTQ community.

- **1965 — Executive Order 11246 (United States):** This order signed by U.S. President Lyndon B. Johnson became a key milestone in a series of federal actions aimed at ending racial, religious, and ethnic discrimination. Also known as Affirmative Action, it protects the rights of workers employed by federal contractors to remain free from discrimination on the basis of their race, color, religion, sex, sexual orientation, gender identity, or national origin and opens doors of opportunity through its affirmative action provisions.

- **1965 — United States Voting Rights Act (United States):** This law prohibits racial discrimination in voting, as well as acts that prohibit a person's ability to vote.

- **1965 — United Kingdom Race Relations Act (United Kingdom):** This act was the first kind of legislation in the United Kingdom to ban discrimination on the basis of color, race, and ethnic and national origin.

- >> **1969 — Stonewall Riots (United States):** In response to a police raid at the Stonewall Inn (a gay club in New York City), members of the LGBTQ+ community held a number of violent protests.

- >> **1976 — Soweto Uprisings (South Africa):** Black schoolchildren held protests in response to the government's announcement that schooling would take place in Afrikaans, the language based on that of South Africa's European Dutch settlers.

- >> **1987 — publication of *Workforce 2000* (United States):** Among this book's predictions was that the future U.S. labor force would include more women and underrepresented groups. Many experts used it as the impetus for creating and making a business case for diversity training.

- >> **1994 — Don't Ask, Don't Tell (United States):** This U.S. military policy prohibited gay, lesbian, and bisexual people from openly serving in the military. In 2011, this policy was dismantled.

- >> **2006 — Civil Union Act (South Africa):** This South African law established legal civil unions for same-sex marriage and civil unions for unmarried opposite-sex and same-sex couples.

- >> **2013 — Marriage Act (United Kingdom):** Established legal same sex marriage in England and Wales.

- >> **2015 — Equal Marriage Act (United States):** The U.S. Supreme Court legalized same-sex marriage in 50 states and required that all states recognize out-of-state same sex marriage licenses.

- >> **2020 — Crown Act (United States):** This law prohibits discrimination against hairstyles and textures in the state of California.

- >> **2020 — George Floyd murder (United States):** George Floyd, a Black man, was murdered by a white police officer who held his knee on George Floyd's neck for more than nine minutes, cutting off his ability to breathe. This event triggered massive outrage, outcries, and international protests for social justice reform and for greater equity and inclusion.

The laws (from various countries across the globe) have evolved in a sequential process from basic human and civil rights to matters of compliance and then the moral and social imperative. As this book explores, organizations' policies and practices related to DEI matters tend to follow a similar evolutionary process. This similarity leads to a universal experience for diversity, equity, and inclusion programs: They're normally initiated with awareness and affinity programs, followed by the establishment of the business case for diversity practices. Keep in mind the local, regional, and national laws vary depending on your location.