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Diversity and
Inclusion:
Establishing,
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Environment

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Congratulations 2018 Forty Under 40 Award Honorees!

Association Forum and USAE weekly newspaper are pleased to congratulate the association community's 40 most accomplished professionals under the age of 40 for 2018. These association and nonprofit professionals demonstrate high potential for continued success in leadership roles and exhibit a strong commitment to the association management and nonprofit industries. We congratulate the winners for their professional accomplishments, commitment to the industry and leadership skills and potential!

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The “I” Before the “D”

Each year, I become more excited about the annual Welcoming Environment™ issue of *FORUM*. It is the time of year when we share research, articles and stories that celebrate and reiterate the importance of unity, inclusion and equity for all.



Michelle Mason,
FASAE, CAE
President & CEO
Association Forum

I recently had the opportunity to attend a speech by Johnny C. Taylor, Jr., SHRM-SCP, president and CEO of the Society for Human Resource Management (SHRM). He shared many provocative insights, but the one that struck me the most was that we are viewing diversity and inclusion through the wrong lens. It is really inclusion and diversity—the “I” before the “D.” As organizations, we need to start hiring without bias or we will risk losing out on valuable employees.

We often remind members through our inclusion efforts that when an association values differences and creates a Welcoming Environment™—one that is comfortable, inclusive, and empowering—it opens the door for innovation, increased participation and an elevated sense of community and belonging.


Welcoming Environment is defined as the creation of a sense of belonging and connectedness that engages individuals in an authentic manner in which uniqueness is valued, respected and supported through opportunities and interaction.

In Chicago, we are fortunate to have a vibrant community of amazing members from diverse backgrounds, ethnicities, ages, gender, ideologies, sexual orientations and more working towards common goals and objectives. We simply want to make the world a better place through advancing the missions of our associations.

In a recent research study released by McKinsey & Co. (January 2018), Delivering through Diversity, companies in the top quartile for ethnic/cultural diversity on executive teams were 33 percent more likely to have industry leading profitability. The research suggests that inclusion of highly diverse individuals beyond gender can be a key differentiator.

For this issue of *FORUM*, we are proud to feature the voices of respected thought leaders to continue the conversation around diversity and inclusion. The goal is to not only stress the cultural importance of a Welcoming Environment, but to make the business case for these initiatives. As Greg Jones, chief diversity officer for United Airlines, says in his interview on page 30, “Genius and creativity come in different forms.” By pursuing and valuing diversity, we open ourselves and our organizations to amplified levels of success.

Associations are in a unique position to be catalysts for change in the industries we represent. It is up to us to be leaders in diversity and examples for inclusion both for our staff and for our members.

In the words of the great, Dr. Martin Luther King, Jr., “Our lives begin to end the day we become silent about things that matter.” 

Michelle Mason



La “I” antes que la “D”

Cada año, me emociono cada vez más con la edición anual de Welcoming Environment™ de FORUM. Es la época del año en la que compartimos investigaciones, artículos e historias que celebran y reiteran la importancia de la unión, de la inclusión y de la igualdad entre todos.



Michelle Mason,
FASAE, CAE
Presidenta y directora
ejecutiva de
Association Forum

Hace poco tuve la oportunidad de asistir a una charla de Johnny C. Taylor, Jr. SHRM-SCP, presidente y director general de la Society for Human Resource Management (Sociedad para la Gerencia de Recursos Humanos (SHRM)). Él compartió muchas ideas interesantes, pero la que más me llamó la atención fue la visión equivocada que tenemos sobre la diversidad y la inclusión. Se trata realmente de inclusión y diversidad: la “I” antes que la “D”. Como organizaciones, debemos comenzar a contratar sin prejuicios o correremos el riesgo de perder a empleados valiosos.

A través de nuestros esfuerzos de inclusión, a menudo les recordamos a nuestros miembros que cuando una asociación valora las diferencias y crea un Welcoming Environment™ (Entorno acogedor): cómodo, inclusivo y empoderador, se abren las puertas a la innovación, una mayor participación y un gran sentido de comunidad y pertenencia.

Welcoming Environment™ se define como la generación de un sentido de pertenencia y conexión que involucra a las personas de manera auténtica, en la que la singularidad se valora, respeta y apoya a través de las oportunidades y la interacción.

En Chicago, somos afortunados de tener una comunidad activa que reúne miembros increíbles de diversos orígenes, etnias, edades, géneros, ideologías, orientación sexual y más, que trabajan para alcanzar objetivos y metas comunes. Simplemente queremos hacer del mundo un lugar mejor, progresando según las misiones de nuestras asociaciones.

Según un reciente estudio de investigación publicado por McKinsey & Co. (enero del 2018), *Delivering through Diversity* (Cumpliendo a través de la diversidad), las empresas ubicadas en el cuartil superior respecto a la diversidad étnica o cultural encontrada en sus equipos directivos,

tuvieron un 33 % más de probabilidades de obtener una rentabilidad mayor en la industria. La investigación indica que la inclusión de personas muy diferentes, más allá de cuestiones de género, puede ser un diferenciador clave.

Para esta edición de FORUM, nos enorgullece presentar las ideas de líderes de opinión respetados para continuar el debate acerca de la diversidad y la inclusión. El objetivo no es solamente reiterar la importancia cultural de un Welcoming Environment™, sino también presentar los argumentos comerciales para estas iniciativas. Como afirma Greg Jones, director de diversidad de United Airlines en su entrevista en la página 30: “El ingenio y la creatividad vienen en diferentes empaques”. Mediante la búsqueda y la valoración de la diversidad, nos abrimos a nosotros mismos y a nuestras organizaciones hacia mayores niveles de éxito.

Las asociaciones se encuentran en una posición única para actuar como catalizadores del cambio en las industrias que representamos. Nos corresponde ser líderes para la diversidad y ser ejemplo de inclusión, tanto para nuestro personal como para nuestros miembros.

En palabras del gran Martin Luther King, Jr., “nuestras vidas empezarán a terminar el día que guardemos silencio sobre las cosas que realmente importan”. ■

Michelle Mason

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The Last Mile: Developing Programs & Products that Solve Problems

By Sheri Jacobs, FASAE, CAE

I often see associations make small changes in an attempt to fix big challenges. They adjust the price of membership when the core issue is a lack of value to members. They redesign their websites but don't improve the accessibility and usability of content, which is often the cause of members' frustrations. When associations see a stagnation or decline in membership dues, they talk about membership models and pricing, but without value, people won't give their money or their time.



Sheri Jacobs, FASAE, CAE
President & CEO
Avenue M Group

Sheri Jacobs, FASAE, CAE, is president and CEO of Avenue M Group. This article is adapted from her book *Pivot Point: Reshaping Your Business When It Matters Most* (published in August 2018), which is available at the ASAE bookstore.

As attitudes and values shift from ownership to access and flexibility, members will be drawn to organizations that provide real solutions that address their challenges and meet their needs. And while a passion to advance a cause or support a chosen industry still drives some individuals and companies to join an association, most organizations will need to find new ways to appeal to those who seek a transactional relationship or who simply wish to find a resource that quickly resolves an issue.

While many organizations view these changes in behavior and attitudes as threats, I believe these changes instead create opportunities for organizations to expand their reach and advance their missions. But this will require organizations to be nimbler in how they operate, make decisions, and deliver value. For some, that might mean a shift from a revenue model based on membership dues to alternative sources of value and revenue. Others may need to focus on creating new experiences, new methods and tools for providing education, and new ways to provide value in a rapidly changing environment. Associations need to think beyond membership models and consider how membership fits within a more comprehensive business model that includes education and other programs, products, and services.

The Perfect Business Model ... Doesn't Exist

For my recent book *Pivot Point: Reshaping Your Business When It Matters Most*, I conducted 17 interviews with association executives and thought leaders. All of the executives were facing challenges I've observed among many associations: technology changes, the need for more accessible information and education, the desire for more flexible customer service options, etc. The solutions these association executives implemented were as varied as their industries, and these interviews demonstrated a key insight I share with my clients: There is not one ideal business model out there. You can identify effective practices and insights by evaluating the models being used by other associations—in fact,

this type of benchmarking or competitive analysis is an important step. But replicating a successful organization's business model or strategy will not guarantee that your association will thrive in the future. Your association must use research to reveal the unique problems faced by the professionals and profession you serve and to develop solutions that address those problems. Moreover, you need to consider the last mile: how your audience integrates those solutions into their lives to address daily challenges.

The Last Mile

The game changer for most organizations will be improving how content is delivered and providing solutions that fit the situation in which they will be used. And while it is important to provide trustworthy and unbiased information, organizations that can deliver information that has been optimized to get the job done will become essential to their members and customers. Unfortunately, some of the characteristics that strengthen an organization's brand reputation also create some challenges for the delivery of benefits. In a recent study conducted by my company, Avenue M Group, for a medical organization, we found that when selecting a resource to stay informed or find an answer to a question, the physician respondents view those developed by the professional society as being trustworthy and scientifically rigorous/graded but not necessarily easy to use. In fact, the study revealed these physicians are more likely to use UpToDate, a software system that is a point-of-care medical resource, in some situations because it offers a broader range of topics, offers better search functionality, and is easier to use.

Where should organizations begin to address such a challenge? The first step in understanding members' and customers' needs is to dive deeper into specific situations or challenges they face in their daily work and to identify the resources they use to help solve problems. For example, you can ask members and customers to identify the resource

they are most likely to use in a variety of situations (see Table 1). For healthcare professionals, it may be a resource used at the point of care. For a restaurant owner, it may be a solution that is easy to use in the kitchen or when managing the front of the house.

Next, organizations need to determine how responses differ by audience segment. This may include demographics such as experience, work setting, location, or other factors. It should also include a review of the issues being faced by underserved markets. Disruptive innovations in the consumer world frequently arise from providing products and services to individuals who have been ignored or disregarded because they are not as profitable or are not central to the core audience (Christensen, Raynor, McDonald, 2015).

Consider the following scenario: It's been two years since you launched a new educational program, and your attendance or revenue has fallen far short of projections. The organization's leadership is considering pulling the plug on the initiative. Prior to the launch, you conducted a survey to identify interest in the topic, barriers to attendance, pricing thresholds, and the best time and location to host the program. Anecdotally, you've heard your volunteer leaders express how important it is for the organization to be a thought leader and the leading source of information on this topic. You've used multiple channels to promote your program, and you feel confident the issue isn't a lack of awareness. So, what went wrong? If this scenario sounds familiar, you are not alone. In fact, nearly every organization I've worked with has shared a similar story

Table 1: Which resource are you most likely to use in each situation?

	Association	Competitor	No resource
I need an answer to a specific question to make a decision.			
I need to review all facets of a specific topic to inform decisions.			
I don't have a lot of knowledge or experience with a topic and need to learn more about it.			
I want to access only evidence-based guidelines to inform decisions.			
I need to access "how tos" to gain more experience on a specific topic.			
I need to find a quick answer to a question to resolve an immediate concern.			

Keep in mind, members and customers can only express their opinions on how they currently access information and resources. What's missing from this type of research is how likely they are to use a product or service that doesn't yet exist. To create new products and services or develop a better business model around your current portfolio, you need to examine the reasons why the problems exist. It's the why behind the what.

about a program, product, or service that failed to launch, break even, or turn a profit even if the data supported its existence.

To figure out what went wrong, let's begin with time to market. If your organization requires new programs or products go through an extensive vetting process that hinges on quarterly committee meetings, extensive research, and approval from the volunteer leaders before they can be launched, it's

“As attitudes and values shift from ownership to access and flexibility, members will be drawn to organizations that provide real solutions that address their challenges and meet their needs. And while a passion to advance a cause or support a chosen industry still drives some individuals and companies to join an association, most organizations will need to find new ways to appeal to those who seek a transactional relationship or who simply wish to find a resource that quickly resolves an issue.”

likely that your new idea was no longer new when it hit the market. The same is true for updating products as well as creating new delivery channels to bring products to market. And while you may argue that some ideas require a high level of rigor before your brand can be associated with the product, slowness to market may also blemish your brand reputation.

A second constraint that could cause a failure to launch is zero or low tolerance for failure. Most organizations operate on a lean budget, one that must be submitted, reviewed, and approved well in advance of the start of the fiscal year. Projections for revenue and engagement are submitted, and programs are evaluated based on the likelihood they will achieve the necessary targets. However, what if your organization budgeted for failure? What if you set aside 3 to 5 percent of your budget to beta test new ideas with the goal of fail fast, learn, improve, and rebuild? Most successful entrepreneurs will tell you they had more ideas fail than succeed. A quote commonly attributed to Thomas Edison is, “I have not failed. I just found 10,000 ways that won’t work.” Associations do not need to test 10,000 ideas, but they should at least be allowed to succeed at the same rate as a professional baseball player who bats .300. In other words, if you develop and launch 10 ideas and three succeed, you are far better off than if you are too slow, too late, or not even in the game.

It’s the last mile of the journey that many organizations pay too little attention to when developing programs, products, and services for their members and customers. If your benefits do not help members address or solve a problem, then they will be passed over for another resource that does. Create and provide the tools and information needed—and deliver it in a way that is most accessible. Just creating and offering tools and information, even ones that are highly rated and well respected, are not enough in today’s market. To build a sustainable business model based on relevancy, connectedness, diversity, and inclusion, your organization must remove barriers to using your programs, products, and services and continually invest in new ideas and solutions that can be easily accessed at the point of use.


How to Get 80 Percent of the Research You Need

It is crucial to make data-driven decisions, though you shouldn’t wait until you have 100 percent of the research before acting on an idea. As Robert E. Gunther writes as truth number 29 in his book *The Truth About Making Smart Decisions*, “Get 80 percent (or less) of what you need, and then act on it.” Examining the behaviors and motivations of members and customers through research and data mining is the key to developing programs, products, and services that provide value. However, if your association waits too long before acting, it is not

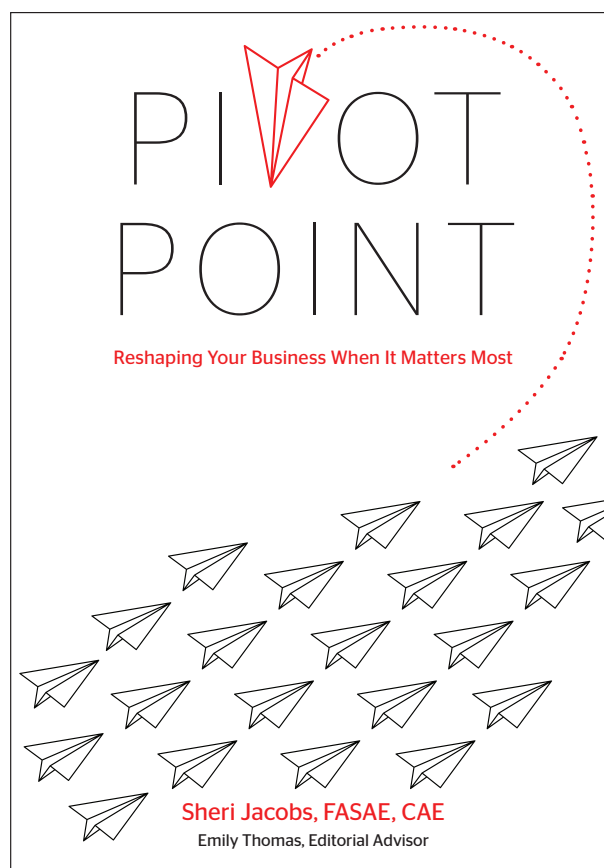
able to keep up with changes in the profession or industry it serves.

Ultimately, if your organization wishes to increase the reach and use of its programs, products, and services, it must consider a nimble business model that leverages the organization's strengths, eliminates barriers and addresses the changing needs of its audiences. Below is a partial list of questions to guide the research needed to address these goals:

- Are members aware of your benefits? How satisfied are they when engaging with the organization, either by accessing information or expanding their knowledge and education? How does satisfaction with key benefits affect renewal rates?
- What are the next best alternatives in the marketplace, and how do they compare to your offerings? Are the next best alternatives more affordable or accessible?
- What are the top challenges and issues facing members, and how does that impact the decision to use your organization's resources? What issues do they expect to influence their work in the next three years?
- What are the unserved segments within your community? Do they have different needs than your core audience? Would they be interested in your current programs, products, and services if these were made accessible?
- How do members currently consume information? What trends are emerging in the consumer world that could affect how members and customers wish to interact with your organization? How does this differ by audience segment?
- What programs, products and services could be enhanced, changed or improved to increase the value of membership? Are there gaps in the current solutions offered that could be filled through creating new benefits?
- Who do you engage in the decision-making process when the organization is considering developing new products or updating existing ones? Do your committees, councils, and task forces reflect the diversity of your audience? If you include early career professionals or individuals from outside your country or region, do they have an equal voice in the decision-making process?

A nimble business model enables your association to pivot when needed; this includes adapting your programs, products, and services to meet the changing needs of the community you serve. 

Sheri Jacobs, FASAE, CAE, is president and CEO of Avenue M Group. This article is adapted from her book *Pivot Point: Reshaping Your Business When It Matters Most* (published in August 2018), which is available at the ASAE bookstore: <https://www.asaecenter.org/publications/109896-pivot-point-reshaping-your-business-when-it-matters-most>. ASAE member and quantity-purchase discounts are available.



Association Forum will be hosting a Meet The Authors reception on October 18 with Sheri Jacobs, FASAE, CAE, and Gary LaBranche, FASAE, CAE.

Job Ads and Social Media

Q: My association is eager to use social media to attract a diverse pool of candidates for a new position we are creating. Any pitfalls we should be aware of?

A: While an employer's goal in using social media may be to create a more inclusive, diverse, and "Welcoming Environment™" organizations always should be careful to comply with all applicable local, state and federal anti-discrimination and other employment laws. Social media has proven to be a great platform to connect with members, potential members, donors, vendors, employees and potential employees, but there are potential traps for the unwary. Many organizations have started to use Facebook, Google, LinkedIn and other platforms to advertise job openings. Social media platforms are understandably attractive to employers because they offer the ability to establish a "target audience" for their job ad.

The landscape of federal laws that protect job candidates is broad. Title VII of the Civil Rights Act of 1964 prohibits employers from discriminating against employees on the basis of race, color, religion, sex or national origin in all aspects of employment—from recruitment to termination.

The federal Age Discrimination in Employment Act of 1967 prohibits employers from imposing bias against people 40 or older in hiring or employment decisions. The Americans with Disabilities Act (ADA) prohibits employers from discriminating against individuals protected under the ADA in hiring or other employment related decisions. There also are state and local employment laws that employers must be mindful of.


All of these laws apply to how employers solicit job candidates—including through the use of social media. In particular, Facebook and other social media platforms offer employers the ability to select a highly targeted demographic market for their job ads. Facebook, for example, offers employers the ability to select the audience for a job ad and then Facebook finds the chosen audience with the extensive data it collects about its members. Facebook can determine which ads its users are shown based on their age, interests and other criteria. Specifically, employers could post a job ad to be run only on the Facebook feed of users 25-36 years old who live in Chicago (or have recently visited there) and have demonstrated an interest in healthcare. That means that anyone over the age of 40 would not be shown the employer's ad.

And therein lies the potential problem. By limiting the ad's reach only to job candidates under the age of 40, the employer may be in violation of the Age Discrimination in Employment Act.

These concerns are not just speculative. Last December, the Communications Workers of America (CWA) filed a lawsuit alleging that companies were violating the federal Age Discrimination in Employment Act by creating job ads targeted to Facebook users within a limited age demographic. The CWA's lawsuit names some of the nation's largest employers, including Amazon and T-Mobile, along with "hundreds of other larger employers and employment agencies" identified in the lawsuit as a defendant class. CWA also filed complaints against dozens of employers with the Equal Employment Opportunity Commission.

Employers (and Facebook) have countered the allegations made in CWA's complaint by comparing targeted employment ads with running job ads in magazines targeting younger (or older) readers (such as *Teen People*, *Teen Vogue*, *AARP* magazine and others). While the case is still pending, and these issues have not yet been resolved, commentators nevertheless have rejected the compari-

son by pointing to the fact that anyone can purchase any magazine they want, but it is literally impossible for older persons to see a Facebook ad targeted specifically to young users.

The CWA lawsuit serves as an important reminder to associations and other employers to carefully consider local, state and federal anti-discrimination laws when determining how best to promote its hiring practices—including where and how they publish job ads. In the end, targeted job ads may not be the best way to achieve inclusion and diversity in the workplace. 

The answers provided here should not be construed as legal advice or a legal opinion. Consult a lawyer concerning your specific situation or legal questions.

This Law Review was written by Kimberly A. Pendo and edited by Jed Mandel, both of whom are founding members of Chicago Law Partners, LLC. CLP serves as the Association Forum's general counsel.





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Why I Stopped Thinking Diversity Was Enough

By **Simon T. Bailey**

Last year I visited Association Forum to share my latest thinking with 40 leaders under 40 years of age. Although an open invitation was sent out, only women showed up. I recognized a golden opportunity to explore and understand issues specific to women in the workplace. I asked questions and listened hard to the answers.



Simon T. Bailey
Founder
Brilliance Institute

Simon T. Bailey is one of America's top 10 most booked corporate and association speakers on change, leadership, and customer experience. He's worked with more than 1,500 organizations in 45 countries. Before founding Shift Your Brilliance, Simon held the role of sales director for the world-renowned Disney Institute and worked in hospitality and tourism for 20 years.

I came to teach, but instead, I learned. I left Chicago with a new understanding and appreciation for what women wish men in the workplace really knew.

Associations, leaders and individual contributors must all contribute to a more diverse workplace. According to a study by the Bank of Montreal's Wealth Institute, women control \$14 trillion of American personal wealth. Wake up. All businesses will excel further and faster if men participate in closing the gender gap and embrace an inclusive work environment for all.

In her book, *Inclusion: Diversity, the New Workplace, and the Will to Change*, author and HR consultant Jennifer Brown defines diversity as the "who and the what: who's sitting around that table, who's being recruited, who's being promoted, who we are tracking from the traditional characteristics and identities of gender and ethnicity, and sexual orientation and disability—inherent diversity characteristics that we're born with."

Inclusion, Brown explains, is the how. It's the behaviors that welcome and embrace diversity. In a perfect world, Brown states that she would wish to have every leader say, "Where is the diversity in this conversation?"

In an inclusive organization, everybody matters. Everyone has a voice and everyone's opinion counts. No matter who you are, your ideas, background and what you bring to the table are important.

In today's global economy, it's the only way to get the edge you need to survive.

It's been proven that inclusion promotes productivity and even innovation. Sociologist Martin Ruef analyzed outcomes from 766 graduates of the Stanford Business School, and his findings showed that those with the most diverse friendships earned higher marks on innovation.

If diversity drives success, inclusivity takes it a step further toward that most desired of outcomes: innovation.

Times are changing, and with them comes a new generation of employees with a very different outlook toward work. Collaboration and teamwork are the keys to their engagement, and inclusion is the necessary component for this workflow. Associations need to engage in thoughtful and deliberate conversations about inclusion NOW if they're going to stay relevant.

In an inclusive work environment, energized employees will embrace their naturally curious natures, organically driving innovation.

Inclusion is no longer limited to gender and race—age is now a factor as generations of workers come together in a way they never have before. People of all ages are learning to work together—sharing new ideas and unique perspectives and gaining from each other's life experience. This goes beyond simply working toward increased diversity. For many associations, it's going to mean a culture shift from the top down.

Here are some ways to implement inclusion today and lead your association to greater engagement, productivity and innovation:

1. Don't wait—get initiatives in place now! Create an "inclusion team" to own this initiative. Gather both leaders and employees together on a regular basis to discuss issues that impact the organization.
2. Design a place where employees are free to be their best selves at work. They'll be set free to approach problems differently and create a culture of belonging. Provide positive feedback to underline the fact that everyone's voice matters. Foster a culture where all ideas are welcome. Authentic recognition costs nothing but goes a long way—and the rewards you reap will be priceless.
3. Give your employees the freedom to find their true purpose—the permission to honestly answer these three questions:
 - What would I do if I knew I couldn't fail?
 - What would I do even if nobody paid me to do it?
 - What makes me come alive?

In an inclusive workplace, your employees will live their true purpose. They will wake up every morning excited. The moment their feet hit the ground, they'll be stoked to make a difference in the life of another. Excited to find solutions and problem-solve, they'll go to bed at night with the internal satisfaction that they were their most productive selves that day.

Your employees will bring their best selves to work and give you 100 percent. ☑

Simon T. Bailey is an author, speaker and the founder of the Brilliance Institute. *FORUM* readers can get **Bailey's Shift Your Brilliance System** kit for just \$97. To receive this offer, email hello@simontbailey.com or call (888) 592-1820.

People Matter: Great Associations Deserve Great HR

By Johnny C. Taylor, Jr., SHRM-SCP

Many of the headlines today are about “people” issues. From immigration, pay equity and paid leave policies to sexual harassment, diversity and inclusion, and living wages, workplace issues—people issues—are placing HR at the center of national debates. While HR departments in businesses everywhere have been working to improve their work milieus, nonprofit associations are increasingly having to do the same in this ultra-competitive market for talent.

People matter more than ever, which means great organizations need great HR. Here are three reasons why every association needs strong human resource management.

Competing for Top Talent

The most vexing issue facing association employers today may be talent—attracting it, keeping it and developing it. Competition is fierce when you are up against private sector employers with bigger compensation budgets. This is where having a strong HR presence and employer brand can put you ahead.

Associations typically have an advantage over the private sector—the ability to offer a flexible, employee-centered work environment with a mission at its heart. Your smaller size enables a human-scaled management focus, including HR-driven best practices that encourage teamwork, flexibility, work-life balance, employee appreciation, learning opportunities and inclusivity.

Hiring without Bias

One pitfall associations may fall into is recruiting and retaining people who tend to look and act the same. Perhaps in the past it was seen as an advantage to have a workforce that shares a background in the industry, profession or cause your members care about. By clinging to longstanding hiring biases, however, associations risk losing out on valuable employees who don't fit the mold. These days, “diversity” also means embracing talent from nontraditional educational and work backgrounds. Would your organization consider talented applicants who don't have college degrees, a straight-line employment history or a squeaky clean criminal record?

Employers may think they are playing it safe by sticking to specific requirements; instead, they may be locking themselves into hiring the same kinds of people time after time. Seeking people “just like me/you/us” overlooks talent at the expense of real diversity. Associations can't afford bias in a time of shrinking applicant pools and pressure to innovate work.

I urge association employers, led by HR, to start conversations about inclusive hiring at their organizations. For our part, SHRM is actively encouraging


employers to change their hiring processes to focus primarily on skills and competencies.

Growing Up Your Company Culture

Skilled HR is also a boon to small associations that are experiencing a growth spurt in today's robust economy. As your workforce expands, so will your need for smart, evidence-based workplace policies, procedures and training.

Further, you will face new demands on your organizational culture. You may not notice that you are outgrowing some workplace customs and expectations enjoyed by small, close-knit, “family-feel” organizations—and that's when trouble can happen. More people mean more problems, and it will be time to revisit your culture.

An employer's culture means more than having a nice place to work. It's what keeps talented employees in place and performing. It can protect you from complaints and allegations. In fact, every decision your organization makes strengthens or weakens your culture.

There's never been a more critical moment to have skilled, credentialed HR professionals on your association team. As member-driven organizations, we associations need to “walk the talk.” For better or worse, we set the example for how a good organization operates and how a healthy culture performs. Investing in expert HR today can pay off for your mission in the years to come, creating better workplaces, better associations, and a better world. 

Johnny C. Taylor, Jr., SHRM-SCP, is president and CEO of the Society for Human Resource Management.



**Johnny C. Taylor, Jr.,
SHRM-SCP**

*President & CEO
Society for Human
Resource Management
(SHRM)*

Johnny C. Taylor, Jr. is president and CEO of the Society for Human Resource Management (SHRM), the world's largest HR professional society. He is the immediate past president and CEO of the Thurgood Marshall College Fund and was named one of *Ebony Magazine's* “Power 100” in 2011. Previously, Taylor held executive HR and legal positions at McGuire-Woods, LLC, Compass Group USA, Paramount Pictures Live Entertainment Group and Blockbuster Entertainment Group.

OMAHA -

New Convention District Development

Omaha plans to invest \$290 million in its downtown convention district along the city's riverfront. This transformational 90-acre project will include many "wow" features that will make the area even more attractive for meetings, convention and events throughout the year. Features of the project include a substantial sprawling green space in the middle of downtown with a performance pavilion, botanical gardens, cascading waterfalls, park-side cafes, a sculpture garden, a water cove, urban beach, boardwalk, and a promenade that leads to cantilever overlooks suspended over the river.

This will add to an already robust convention district that includes Omaha's 346,000 square foot convention center with an attached 18,300-seat arena, and more than 3,000 downtown hotel rooms, including two full-service properties directly across the street—one connected via skywalk.

Within blocks of the convention center are two distinctive entertainment districts. The Capitol District, right across the street, provides an outdoor town square area surrounded by pubs and restaurants. A few blocks away is Omaha's Old Market Entertainment District - where locally-owned restaurants, pubs, craft cocktail bars and cafés line cobblestone streets. Performances by street musicians and artists add to the fun as you wander in and out of the many boutiques and galleries that make this district one of Omaha's top attractions.



Conveniently located in the center of the country, Omaha offers easy accessibility from either coast, with non-stop service to more than 26 of the nation's busiest airports. Once you land, you'll be in good hands; Omaha's airport (OMA) is ranked #1 in customer service. The ease continues with complimentary direct shuttle service - 4.7 miles to be exact - to Omaha's downtown convention district.

Perhaps the biggest payoff though is time. Not only will you save a lot of it, but you'll also enjoy more of it. With a Walkability score of 85, twelve blocks per mile means you can walk an Omaha block in a New York minute. An average of 212 days of sunshine per year adds to the appeal of exploring the downtown convention district by foot. Just ask the 40,000+ attendees who travel from across the globe for billionaire Warren Buffett's Annual Berkshire Hathaway Shareholders Meeting, or USA Swimming which will hold the U.S. Olympic Swim

Trials in Omaha for the fourth time in 2020, or the NCAA which just finished hosting its 69th Men's College World Series in Omaha.

With millions of dollars being invested in Omaha's downtown convention district, and the city's hotel supply continuing to grow, Omaha's value as a meeting destination is only getting better.

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A photograph of three people (two men and one woman) smiling and toasting with glasses of beer and wine. They are in the foreground, with a busy street scene in the background. The street is lined with shops and restaurants, including 'Havana', 'Ahmad's', and 'Mr. Toad's Courtyard'. The scene is lively and colorful, with people walking and outdoor seating.

A QUICK WALK TO, WELL, EVERYWHERE.



The Old Market Entertainment District

Around here, walking distance is king. A mere six blocks separates the downtown convention center from Omaha's Old Market Entertainment District. Farm-to-fork restaurants, friendly pubs and eclectic shops line the cobblestone streets of this sophisticated urban playground, which is close to more than 3,000 downtown hotel rooms. So you can grab a drink (or two) after your meeting, then walk back to your hotel with ease.

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Unconscious Bias and its Impact on Leadership Decision Making

By Dr. Shirley Davis

It couldn't be a more appropriate time to address unconscious bias at a time when we are experiencing significant demographic disruptions, polarization and divisiveness, globalization, and political discord. This article introduces this topic as a leadership competency as well as an organizational strategy.



Dr. Shirley Davis

Dr. Shirley Davis is a well-respected thought leader and keynote speaker on the changing global workforce and culture transformation. She is the author of *"The Seat: How to Get Invited to the Table When You're Over-Performing and Undervalued."*

Learn more about her at www.drshirleydavis.com.

Everyone has bias. It's a part of the human make up. We need bias to protect us from danger. Biologically we are hard-wired to prefer people who look like us, sound like us and share our interests. But when left unchecked, biases can have a negative impact in every interaction. With the vast amount of diversity that makes up our global workforce, including more women, people of color, LGBTQ individuals, veterans, introverts and extroverts, immigrants, people with different abilities, thinking styles, and personalities, and five generations, to name a few, the level of complexity and potential conflicts that can arise from unconscious bias is sure to increase. Every day, decisions are made in the workplace—including sourcing, selection, development, pay, promotions, terminations, assigning projects, constructing teams and creating business strategy. Whether we recognize it or not, unconscious bias enters into every one of these decisions.


Having worked in human resources for more than 20 years, I am intimately aware of how leaders think, behave, and make decisions about all aspects of the employee experience. In particular, I've worked with hiring managers as they reviewed candidates from diverse backgrounds and I've heard comments such as, "She didn't look me in the eye or shake my hand with a firm handshake so I don't think she's cut out to lead this team," or "We need a Millennial for this new project on technology," or "This job requires a demanding schedule and I don't think she could be available." In other instances, leaders may assign special projects to team members who think like them, or invite only the guys to the golf outing assuming the women on the team wouldn't be interested, or delegate administrative tasks such as notetaking or ordering lunch to the only female in the meeting. These are both overt and subtle forms of bias and both can have a negative impact on the workplace culture and perceptions of fairness.

Unconscious bias is an opinion, positive or negative, we have about a group or person. It occurs when we make spontaneous judgments about people or situations based on our past experiences, culture, background, or exposure to media. These spontaneous judgments occur within 3-5 seconds of encountering a person. The attitudes or stereotypes that develop early in life (as early as 1-6 years old), are reinforced over time, and affect our understanding, actions, and decisions in an unconscious manner.

What Can Leaders Do?

It is not enough to become aware that everyone has bias and therefore assume we are off the hook. All leaders, particularly people managers, have a responsibility to ensure that their biases don't negatively impact employment-related decisions. They should practice mindfulness—STOP, PAUSE, and THINK before making these decisions and be more intentional about valuing diversity and learning how to LEAD across differences. They should learn how to leverage the gifts and talents of ALL employees, recognizing that great talent comes in all shapes, sizes, colors, preferences, backgrounds and ethnicities.

What Can Organizations Do?

The first step in managing unconscious bias in the workplace is to ensure employees understand exactly what unconscious bias is, when it happens, and the ways in which it can impact the how they work and treat each other. Educating employees formally through training and informally through multiple communication methods is the start of what should be a continuous learning process. Employees should also know that they are a part of shaping the culture into an inclusive, welcoming, and collaborative workplace. 

Learn more at www.drshirleydavis.com.

Ascending to the Summit

Construction begins on Washington State Convention Center's expansion project.

Visit Seattle has broken ground on the Summit Building, a new facility in downtown Seattle that will double the size of the Washington State Convention Center (WSCC). The \$1.7 billion project, due to be completed in 2022, will give Visit Seattle the opportunity to accommodate larger conventions, as well as increasing their ability to book more business simultaneously. The Summit is expected to be Gold LEED Certified and will provide \$93 million in community improvements.

"Meetings mean business in Washington, and our Convention Center's Arch and Summit buildings are an economic catalyst for Seattle as we now have the ability to fulfill excess demand for meeting space in our city," Visit Seattle president & CEO Tom Norwalk said. "Thoughtfully designed and centered in the heart of our downtown, both buildings will provide an atmosphere that foster future innovation."

Once completed, the Summit will catapult the WSCC into the elite class of convention centers that boast more than 1 million square feet of space. In the past five years, limitations on space have led Visit Seattle to turn down more than 350 event proposals. Combined with a rapidly growing hotel inventory, Seattle is primed for a massive influx of new business, new jobs and increased economic benefit.

"Convening is critical for social progress, education and pioneering breakthroughs. We are proud that association meetings are the cornerstone of our business at the Washington State Convention Center and that our existing Arch building on Pike Street has been at the heart of so many breakthroughs for these groups," Visit Seattle vice president of convention sales Kelly Saling said.

The project also has earmarked funds to improve the neighborhood and continue the convention center's 30-year commitment to providing affordable housing in the area. The pedestrian and transit infrastructure in the area around the Summit will be enhanced through widened sidewalks, protected lanes for pedestrians and cyclists and safety improvements for drivers. 



Photo credit: Visit Seattle/LMN Architects



(L to R) WSCC president & CEO Jeff Blosser, PCMA president & CEO Sherrif Karamat, Association Forum president & CEO Michelle Mason and Visit Seattle president & CEO Tom Norwalk.

Photo credit: Alabastro Photography



Congratulations to ASAE on a record-breaking Annual Meeting & Exposition!

Association Forum is proud to have taken part in the ASAE Annual Meeting & Exhibition, held August 18-21, 2018 in the greatest city in the world: Chicago! A total of 6,092 association professionals and industry partners gathered at McCormick Place, breaking the previous attendance for the conference (set in 2007, when the conference was last held in Chicago).

Thank you to our members who attended the Association Forum Member Meet-up at the Park Grill in Millennium Park. We are so grateful for the strength and connectedness of our community. We are always excited to convene and engage with our members.



We look forward to continuing the tradition of celebrating the Chicago association community at Holiday Showcase 2018 on December 13.



ASAE Epilogue & Idea Swap

On August 22, Association Forum members gathered to swap ideas learned at #ASAE18. Here are some of the takeaways:

Association Culture for Members and Staff:

- Always ask, “How can we make this member/customer experience with our association meaningful.”
- Have a photography contest with your members to get them to engage with your brand on social.
- Invest in personality assessments for your staff to build to their strengths.
- It’s important to focus on your staff strengths and build diverse teams that play to those strengths.
- Send quarterly reminders to your staff about the importance of cybersecurity and PCI compliance.
- The option to telecommute is increasingly common at associations.

At Your Events

- Consider a ribbon-cutting ceremony to “open” your show floor. It’s a great opportunity for press and sponsor engagement.
- Create opportunities throughout your conferences for various interest groups to come together. #ASAE18 had a lot of lounges and meet ups.
- Don’t forget about your first-time attendees. Use behind-the-scenes tours, pre-event webinars, ribbons on name badges and mentors to ensure that your first-time attendees have a great experience.
- Having booths or exhibits outside of the show floor, such as the smoothie area, were a great way to engage attendees throughout the conference.
- Phone charging stations that you can lock allow attendees to stay focused on the education and tradeshow while staying connected.
- Share more event metrics to drive engagement and attendance.
- Social responsibility and engagement are critical for all associations at annual meetings. #ASAE18 weaved social responsibility throughout the conference and it was noticed.
- Speaker preparation is key! Ensuring that speakers understand the room set up can ensure that they design a program to fit the space.
- Use beacon technology for your tradeshow. Exhibits gain high value from the data reported.
- Use the data in your event app—capturing attendees’ interest using the “My Schedule” tool is great intelligence.
- Weave the theme for your annual conferences throughout the entire show. The #ASAE18 Get Focused theme was successfully woven into videos and talking points.

Creating an Environment for Innovation

- Before brainstorming specific ideas, start with listing the 10-15 questions you need to consider with the brainstorm. This will help you think broadly and comprehensively when brainstorming.
- Data shows that the numbers of products purchased by customers is what drives engagement with your association. The purchase of membership, is weighted equally with other purchases.
- Diversity. Diversity. Diversity. Diverse opinions drives innovation.
- Steal the “hackathon” idea from software companies and have your members and stakeholders “hack” challenges your association is facing. Teams of five can gather for a day to explore solutions to the challenges. Don’t forget to give them a prize!

Inclusion is a Leadership Competency

By **Gloria Castillo**



Over the last year we have heard that the country is deeply divided, yet in the workplace we persist in coming together in common purpose. It is clear that intentional action is needed now, more than ever, to implement leading inclusive business practices. Expanding diversity and inclusion requires committed intentional action from senior officers.

The Business Case

There is good reason for this focused commitment. We begin with the business case. Groundbreaking global research conducted by McKinsey & Company in 2016 looked at over 1,000 companies in 12 countries, including the U.S., and affirmed the correlation between diversity, a greater proportion of women and ethnically/culturally diverse individuals in the leadership of large companies, and financial outperformance. According to McKinsey, “In the U.S. there continues to be a linear relationship between ethnic/racial diversity and better financial performance,” when using two measures of financial performance—profitability (measured as average EBIT margin) and value creation (measured as economic profit margin.)

Leadership

As President and CEO of Chicago United for the last 15 years, I've worked to assist companies as they take deliberate actions towards change, through relevant research, actionable tools and leadership insights to advance diversity and inclusion (D&I) within Chicago corporations. Chicago United was founded in 1968 following the tragic death of Dr. Martin Luther King Jr., with the aim of discussing solutions to local economic instability and racial unrest. For 50 years, Chicago United has maintained the dialogue between multiracial senior leadership driving corporate and minority-owned businesses and civic and non-profit leadership with the common goal of creating a strong social and economic climate for everyone.

What I've learned is that leadership is the critical lever, and those firms with deeply inclusive cultures are differentiated from their competitors in important ways that drive success. McKinsey recommends that leadership explicitly define

priorities based on what will drive the business growth strategy. Leading companies do this in a data-driven way, by creating baseline benchmarks and regularly evaluating progress and correlations to success. Chicago United's annual, “Inside Inclusion Featuring the Corporate Diversity Profile,” evaluates top-level findings on gains and losses in diverse representation in leadership in the top 50 publicly held corporations in Chicago. The Profile provides a roadmap to improving areas critical to D&I advancement

The Multicultural Context and Cross-Cultural Competency

In today's environment, leadership takes place within a multicultural context. These environments include employees who represent different ethnicities, geographies, generations, religions, genders, etc. There are varying degrees to which work teams and organizational units will reflect this spectrum of diversity. However, whether one leads a multicultural team directly or has ultimate accountability for a multicultural organization, understanding and effectively addressing issues and opportunities within this context is inextricably linked to organizational effectiveness.

The top level of leadership will articulate the vision and strategy to set the culture of inclusion, but it will take inclusive leaders at every level of the organization to embed the culture and drive success. For that reason, a cross-cultural competency model must be structured into the leadership competency models.

Cross-cultural competency models are comparable to general leadership competency models. Ask an industrial-organizational psychologist or organizational development practitioner what leadership competencies refer to and you will most likely get a framework that includes knowledge, skills, abili-

“As these elements of cross-cultural competency are integrated, we embed inclusive practices that transform the organizational culture and create sustainable diversity and inclusion. The rewards include talent attraction and retention, organizational relevance to new and expanding markets and innovation in process and products.”

ties, traits and other characteristics. While there are some schools of thought that describe competencies as simply the technical skill sets a leader demonstrates, organizations that fail to recognize the power of a person's soft skills will lose the full leadership capacity to harness the engagement of their teams. We are better served to view leadership competencies in a more holistic sense rather than solely focusing on technical skills.

It's evident that there is an overlap between the framework that defines leadership competence, in general, and those that define cross-cultural competency. Specifically, the ability to demonstrate self-awareness, emotional intelligence and adaptability is foundational to strong leadership as well as to navigating in a multicultural environment.

How do we translate these models into usable tools for performance management, succession planning or career mapping within our organizations? In comprehensive competency models, there are specific behaviors aligned with each competency, and expected levels of performance spelled out for specific job levels or roles. Breaking down a competency model into these behaviors helps individuals understand what the organization values, and how it interprets each competency within its organizational context. This can be a useful tool for many practices, including performance appraisals and career mapping.

The expanded definitions of these competencies guide employee behavior. Cross-cultural competence comes to life through consistent and visible behaviors. One visible behavior is engaging in dialogue that leads to understanding other cultures and beliefs. For instance, Chicago United recently facilitated a dialogue on strategies for engaging Muslim colleagues. The introspective and collaborative discussion addressed education, solutions and benefits to engaging Muslim team members and clients while fostering an inclusive environment

There are accessible areas in which we can begin to build the muscles of our cross-cultural competencies as leaders. We can demonstrate open mindedness as a cross-cultural skill by surrounding ourselves with individuals or groups from different backgrounds, both cultural and functional, to stimulate learning and new ways of thinking. We can also intentionally include multi-level and cross-functional groups to address organizational challenges and opportunities. A tolerance for ambiguity is key and is demonstrated by reaching out to others with known differences in perspectives to help identify our cultural blind spots. This allows us to acknowledge what we don't know or what we would like to learn more of. We can intentionally facilitate discussions in a manner that enables all team members to contribute, even those who may be reticent to offer opinions.

Best Practices for Inclusive Workplaces

As we strengthen our ability to embrace inclusion as a leadership competency, we actively seek to understand how different groups are impacted by institutionalized practices and begin to challenge practices, policies and behaviors that do not promote an inclusive workplace.

Chicago United, which is celebrating its 50th anniversary this year, offers these behaviors or leading practices for leaders of multicultural teams:

- Configure teams that reflect balance in terms of strengths and diverse insights.
- Delegate work that compliments each direct reports' strengths and capabilities to successfully contribute to team goals.
- Craft developmental and stretch assignments for direct reports to help them improve their level of contribution and performance.

- Hold direct reports accountable for creating diverse and inclusive team structures.
- Hold ongoing conversations with direct reports to gain understanding of the strengths and unique contribution potential of indirect reports.
- Be proactive in giving constructive feedback to those from different cultural backgrounds in a manner that is respectful and mindful of individual needs.
- Challenge the status quo of the work group to encourage new ways of thinking and accomplishing tasks and encourage others to do the same.
- Encourage the group to address conflict openly and respectfully.

- Address disrespectful team behavior immediately.
- Speak up in a supportive manner when specific individual views are being ignored or disrespected.
- Encourage the team to challenge their assumptions before drawing conclusions or making decisions.

As these elements of cross-cultural competency are integrated, we embed inclusive practices that transform the organizational culture and create sustainable diversity and inclusion. The rewards include talent attraction and retention, organizational relevance to new and expanding markets and innovation in process and products. 

Gloria Castillo is the president and CEO of Chicago United.



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Learning to Fly: Creating a Worldwide Welcoming Environment

By Michelle Mason, FASAE, CAE

For Greg Jones, creating a Welcoming Environment is a global effort. As chief diversity officer for United Airlines, Jones oversees diversity and inclusion (D&I) initiatives that span from United's headquarters in Chicago to the over 300 destinations in which their fleet touch down. Jones believes that an organization's business goals and its D&I strategy are inherently connected, since broadening the scope from which a business seeks talent allows for a wider influx of genius, creativity and leadership. But it's not just about opening doors, it's about reaching out, encouraging and guiding new people from all demographics to join your organization, as well as continuously providing them with the resources to succeed.

Michelle Mason, president and CEO of Association Forum, spoke with Jones for a candid conversation about how a Fortune 100 company builds a Welcoming Environment and how those tactics can be applied to associations.

Mason: What is the business case for diversity and inclusion? How do D&I initiatives contribute positively to the bottom line?

Jones: It has changed over the years, but in the current state, the business case for diversity and inclusion is that the world has changed, and this country has changed. There are more and more people participating in business, education and non-profits across the board. Women and people of color are participating as employees, executives, managers and customers in a way that they never have before. So, there is a need for change in how we do business and I think it goes directly to the bottom line. The business case for diversity and inclusion is almost like the business case for marketing in organizations. There is a different dynamic at play, so you adapt to the dynamic. In this case, it happens to be the demographics of people.

Mason: What actions can an organization take to bolster their D&I initiatives?

Jones: It's important that D&I is not treated as a program or as some sort of initiative that is done just for the sake of being done—you've probably heard the phrase "checking off the box." The fact of the matter is that the customer base and the employee base of organizations are changing, and

your actions need to be very deliberate. Whether it is about finding diverse employees, visiting certain schools such as historically black colleges and universities or all-women colleges, or recruiting in different markets.

On the customer side, what are you providing in terms of products and services that accommodate those changing demographics within your customer base? The diversity department at any company should be partnering with the marketing department, the community affairs department and the sales department to make sure that mindset is permeated throughout the organization.

Mason: How does that alignment occur? What would you say would be the first step for an organization to get started?

Jones: It would vary based on the organization and its structure, but I would say it starts with the diversity leaders themselves. I do believe that the diversity leader in any organization has to have a broader view of his or her role and the impact he or she can have, as well as the impact that it can play. I've had the experience of being perfectly comfortable knocking on the door of the sales team or the marketing team and making sure it's clear the impact and the role that diversity plays, or can play, within their teams. A diversity leader should be able to understand in a broader sense the business needs and the business role of what they do. For instance, I ask the questions, "How do we make money? How is customer satisfaction attained? How is employee satisfaction attained?" I have to think about what role diversity plays in that overall equation and then deliver.

“The world has changed, and a lot of organizations haven’t been able to keep up with the changes that are coming. So, [Generation Z] is going to come into the workforce as the people with opportunities to change things to be in alignment with their life experiences.”

Mason: When you say diversity leader, that clearly would be someone who’s responsible for the organization’s overall strategy. So, what is the CEO’s role as it relates to D&I?

Jones: I don’t think it’s any different whether diversity and inclusion was in there or not. The CEO plays the role of the strategist and the big leader. They are the conductor of the orchestra that is the company. Sometimes when they are conducting, they’ll give the way for the violins and sometimes they’ll have the oboe pretty pronounced and sometimes the flutes will have the main part in the composition. That same thing plays within the organization. Sometimes they are pushing hard for the sales team, sometimes they are pushing hard for the marketing team or operations, and sometimes they are pushing hard for diversity. It’s knowing that you’re sitting at the table and being acknowledged and that they are saying that all of the components make the whole. The role of the CEO is to make sure that diversity is in the overall orchestration.

Mason: Let’s talk about Generation Z, (people born between 1995-2015), who will be entering the workplace within the next couple of years. What do you think their impact on D&I will be?

Jones: These younger generations are coming in with an incredibly inclusive orientation and with a very diverse mindset that is to some degree

based on their experiences through social media and social interaction. But what’s really interesting about them is that they’re going to run into institutions that aren’t in alignment with their life experiences. They’re going to run into old systems. I think their challenge will be to take the time to understand those systems and bring the mindset that they grew up with to those systems.

One can only hope that once they go into these institutions that haven’t fully changed yet, they will have the patience to know that they’re bringing something that is needed versus saying “Oh my goodness, I can’t believe what they’re saying. I have to get out of here.” The role that they’re playing is the role of change agents. We need them. The world has changed, and a lot of organizations haven’t been able to keep up with the changes that are coming. So, [Generation Z] is going to come into the workforce as the group with opportunities to change things to be in alignment with their life experiences.

Mason: How do you ensure a Welcoming Environment for your employees as well as your customers?

Jones: At United, we have our shared purpose and values. They’re almost familial. As a company, we move more than 150 million people a year. We operate almost 4,600 flights a day, and we touch over three hundred destinations all over the world. Almost by the nature of what we do, we’re diverse and we have to be welcoming as best as we can on a day-to-day basis. It’s inherent in what we do as a business.

There are values and parts of our leadership model that determine how we treat people—how we treat our employees and people that are

onboarding to make sure that they're treated well. Employee engagement and customer engagement is a big deal for us. Our Business Resource Groups are a big part of that. Some organizations may call them affinity groups or employee resource groups. These groups are very much a part of our corporate infrastructure now. These groups help us to set up a welcoming environment for all that come onboard, regardless of their background. Our leaders, employees and managers all participate in these in one form or another. Our CEO is very much in alignment with all of these things. You'll hear him talk about what United means and what being a part of the United family means. It is a part of our culture and that environment is something that we talk about every day to the point where it drives a mindset and it drives behavior.


Mason: Let's say you were king of the world and you were able to set what the ideal state. What does that look like and what would you say is required to get us there?

Jones: This is going to sound a little bit Pollyannaish, but I do believe there's a certain kind of open-mindedness that needs to occur for individuals or organizations to be as effective or impactful as they can. It turns out that leadership, talent, creativity and all these things come in a lot of different packages. Sometimes, we get stuck on what they look like. Some of the most intensely creative or disciplined people, or the best leaders in the world, may not be what we think leaders historically look like in the corporate space. So, the ability to have an open mind and accept talent in the package in which it comes would be the ideal state.

Mason: What advice would you have for an association CEO?

Jones: I would tie it to my last answer, that genius and creativity come in different forms. Having the courage to go outside of what you

think or what is traditional is something that leaders should take on. It speaks to the diversity and inclusion situation, but it also speaks to that next thing that leaders are looking for. I would encourage leaders of associations not to be afraid to look at those things that may be a little bit different than they historically have interacted with, because the solution may be there.

I would say that they have people in their organizations that are burning like 40-watt light bulbs, because they've been treated like 40-watt light bulbs. It turns out that with a few connections and some conversations, you can turn the bulb all the way into the socket and it turns out that you've been missing out on a 100-watt light bulb. Engage with your people. Go and meet people who are different than you, and find those new things that you probably have been talking about for the last few years. It's one of the hardest things to do but go outside of what's comfortable to discover that next talent. 

Michelle Mason is the president and CEO of Association Forum.



Greg Jones
Chief Diversity Officer
United Airlines

Greg Jones, a Chicago native and Navy veteran, is the chief diversity officer for United Airlines. He is charged with developing strategic and executive plans for embedding diversity and inclusion principles, policies, training and behaviors throughout the airline. His work in the field of diversity and inclusion landed him on the 2017 Ebony Power 100 list. He serves as a member of the board of directors for the Thurgood Marshall College Fund, advisory board member for the Organization of Black Aerospace Professionals (OBAP), member of the Executive Leadership Council (ELC) and distinguished visiting professor at Johnson and Wales University. Jones attended Tuskegee and Stanford Universities, where he received his undergraduate and graduate degrees, respectively in electrical engineering.

Diversity and Inclusion: Establishing, Building and Maintaining a “Welcoming Environment”

By **Troy Cicero**

Troy Cicero
President
MulticultuReal
Communications, Inc.



Affectionately known as America's Chief Skill Officer, Troy Cicero has created a formula and framework for individual and institutional accountability which encompasses seven strategic focus areas: Leadership Development, Diversity & Inclusion, Service Excellence, Team Building, Conflict Resolution, Stress Management and Motivational Speaking.



People make choices. Businesses and organizations win or lose, many times, based on the choices people make. People want “welcoming environments” at which to work, spend their money, invest their time, volunteer, donate to a cause, be a member of, solve problems, join like-minded individuals, bring their talents, receive treatment and so much more. What choices are people inclined to make when they think about or experience your organization?

“There is a courtesy of the heart; it is allied to love. From it springs the purest courtesy in the outward behavior.” Johann Wolfgang von Goethe

I have been in the Diversity and Inclusion (D&I) space professionally since 1994. I have coined the phrase: **Culture** is the environment; **Diversity** is the vehicle; **Inclusion** is the engine; and **Cultural Competence** is the fuel that we need to make it to our destination on the journey.

Establishing, building and maintaining a “welcoming environment” requires an acceptance of differences, an attitude of empathy (versus an attitude of apathy) and emotional intelligence. It also requires an acknowledgment of unconscious bias and efforts to challenge the insidious nature of these biases. You must consistently live the Golden Rule (treat people the way you want to be treated) and the Platinum Rule (treat people the way they want to be treated) and honor good core values.

A “welcoming environment” is a workplace where all cultures and all people feel heard, valued and respected, and there is open communication and understanding (i.e., culturally competent organization). When people feel heard, valued and respected, they realize they are part of an inclusive organization, and they are willing to commit their full talents, gifts and skills (i.e., performance and productivity) to the success of the organization. When people feel heard, valued and respected as customers, members, etc., they want to stay, pay, come back, tell others, et al.

Maya Angelou once stated: “I’ve learned that people will forget what you’ve done, people will

forget what you’ve said, but people never forget how you make them feel.”

When something goes wrong or when conflicts arise in a “welcoming environment”, there must be a willingness (even eagerness) internally within the organization to address an issue (i.e., accountability). If something goes wrong externally, there is a willingness to give the benefit of the doubt to your organization by those you serve, because there is healthy, respectful and productive relationship. We need more people to choose to participate in the work of creating “welcoming environments,” especially during these tumultuous times throughout our nation and world.

Guess where it all starts? That’s right... everywhere with everyone, but most certainly, yes...it starts at the top. Leaders often view their role as approving the D&I process versus being a champion and leading it. This ambiguity can create obstacles and frustrations for those accountable for establishing, building and maintaining a “welcoming environment” in the organization. There needs to be a collective energy of empowered individuals performing a myriad of roles in an authentic manner throughout the organization.

Today’s leaders must possess genuine D&I leadership traits. The ultimate goal of a D&I leader is to lead by example while valuing diversity and creating inclusion, so that others are clear of the standard and expectations set that




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honor organizational vision, mission and values. Diversity and Inclusion leaders embrace twelve traits:

- 1. Self-awareness.** Understanding oneself is integral to self-discipline. It also builds the bridge to understanding others. Exploring our upbringing, experiences, values and beliefs helps us to understand how our personal identity influences our view of others. The assumptions we formulate about others ultimately impact the decisions we make. If we rely solely on our point of view, we will make mistakes in judgment as a result of ingrained biases, stereotypes or prejudices.
- 2. Empathy.** People trust and respect leaders who seek to understand where others are coming from. Listening with your heart as well as your head creates collaborative and cohesive relationships. Empathy, in my opinion, is the great equalizer. You can say you care, but empathy conveys you care. You can say you respect, but empathy conveys you respect. It's not what you say that matters, it's what you convey that counts.
- 3. Emotional Intelligence.** There will be resistance and possibly tension on a diversity and inclusion journey. Emotions and feelings have the tendency to manifest our attitudes, actions and behavior. You can be extremely intelligent, but if you can't get along with people, then how can you possibly be successful? To be effective, leaders must exhibit proactive behavior, while managing and regulating their emotions and personalities. Reactive behavior is reckless and certainly not conducive to a “welcoming environment.”
- 4. Broad Perspective.** Diversity and inclusion leadership involves an awareness of others and the environment. Leaders must make unpopular decisions and choices, particularly in crises. Maintaining a broad perspective affords you a keen sense of direction when formulating decisions and enables you to minimize dissent.
- 5. Cultural Competence.** We operate in a multicultural world, society, community and workplace. Every culture in the world has rules or guidelines about specific areas that tell members how to behave the right way. A danger sign that may predict a lower level of cross-cultural skill is a belief that “there is only one right way to do things.” Leaders must maintain their willingness to engage and to see things from another person's perspective, as well as be aware of the impact of their assumptions, attitudes and actions. Leaders must be mindful to acknowledge within and challenge their biases and rules

they live by. Challenging assumptions is a key skill for people in 'welcoming environments.'

6. **Communication.** Open and honest communication enables you to connect with people who feel fear, anger, stress, anxiety and uncertainty. People respect leaders who share information, acknowledge feelings, present facts, give and seek feedback, manage expectations and provide support. Diversity and inclusion leaders are open to hearing and acting upon the input of those they lead.
7. **Compassion.** Compassion is the heart of leadership. Being attuned to other people's emotions and needs gains people's respect and loyalty. Exclusionary behaviors or actions cause people to walk away and never return.
8. **Commitment.** Leaders must commit fully to implementing diversity and inclusion efforts. People will not follow an uncommitted leader.
9. **Vision.** The ability to assess and understand the impact of diversity and inclusion on the organization, the business case and benefits of diversity and inclusion on the organization, and a leader's role and influence on the culture and direction of the organization is a great value to an organization. John Stuart Mill once wrote: "One person with vision is greater than the passive force of ninety-nine people who are merely interested in doing or becoming something."
10. **Conscious responsibility.** Complacency and denial endanger progress. Diversity and inclusion leaders need to deal with potential dangers or deficiencies. Leaders who view diversity and inclusion as a program, rather than an ongoing strategy and responsibility, jeopardize growth and profitability.
11. **Accountability.** Defined as: An obligation and willingness to accept responsibility and account for one's actions. All stakeholders must be accountable on a diversity and inclusion journey. The leader sets the tone. Accountability is measured through business systems, strategy, standards, mission, vision, values, goals, and objectives, as well as, on a personal level... thoughts, emotions, attitudes, actions, and behavior.

12. **Tangible engagement.** A diversity leaders' character is reflected not by the spoken or written word, but by their actions and behaviors. Effective leaders remain active in diversity and inclusion initiatives and walk the talk. The leaders' behavior and actions, in the end, become the determining factors for success or failure in establishing, building and maintaining a "welcoming environment." 

Troy Cicero is president of MulticultuReal Communications, Inc. He can be reached at troy@multicultuReal.com or 815-726-7750.



Association Forum's Commitment to a Welcoming Environment® (WE)

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The
Value
of Equity,
Diversity,
and
Inclusion

By **Brooke Morris**



Equity, diversity, and inclusion (EDI) has become a major workplace interest within the past few years. With the rise of social movements such as Black Lives Matter and the #MeToo Movement, organizations are becoming aware of the need to have the conversation about inequalities that exist both domestically and globally. The increase of social justice awareness is not the only reason why companies and organizations need EDI. From staff to members, most non-profit organizations bring together people of various races, ethnicities, genders, religions, and sexualities, therefore, they must incorporate and utilize EDI in their mission and values, staffing, and member programming.

In their article “Why Diversity, Equity, and Inclusion Matter,” authors Monisha Kapila, Ericka Hines, and Martha Searby maintain that organizations that prioritize EDI create an environment that respects and values individual differences, fostering a culture that reduces bias and recognizes and addresses systemic inequities that cause disadvantage for certain individuals. “This is not a human resources issue, it is a strategic issue,” says Kapila, Hines, and Searby, “These efforts should be reflected in organizational mission, vision, and values; incorporated into strategic plans; and cascaded throughout the organization.”

Advocating for EDI

“For some organizations, the moral imperative of equity may be enough to spur action,” states the National Council of Nonprofits. Other organizations, however, may be moved to action by data indicating that EDI can boost their membership and staff diversity. At the American Library Association (ALA), equity, diversity, and inclusion are fundamental values of the association, and the organization uses a social justice framework to ensure the inclusion of all individuals within the library profession and the association. As part of its efforts to promote EDI, ALA developed key initiatives such as programming advocating diversity, outreach to underserved populations, and workforce development that focuses on diversity.

Not all organizations have elements of EDI within their strategic plans or missions and mak-

ing the case for incorporating EDI into an organization’s values means appealing to the moral, economic, service, and performance aspects of the organization. From a moral standpoint, non-profits are created to improve society and should therefore be diverse, inclusive, and equitable.

According to Kapila, Hines, and Searby, each person has value to contribute, and we must address the barriers and historical factors that have caused unfair conditions for marginalized populations. Economically, it is beneficial for companies and associations to implement EDI in their workplace culture and policies because having a diverse workforce means leveraging skills and talents from a range of populations. Similarly, organizations will better serve their members and customers by utilizing EDI as maintaining these values shows customers and clients that they are represented and the organization cares about them and is truly invested in their well-being. Having a well-represented, diverse, inclusive staff also increases productivity, as diverse groups of problem solvers offer different opinions and viewpoints, making them better equipped at solving problems than groups made up of individuals who are all the same.

Understanding EDI

To properly advocate for EDI, organizations must fully understand the meaning of the terminology. According to ALA’s Office for Diversity, Literacy, and Outreach Services, equity “...assumes difference and takes difference into account to

“Organizations that prioritize EDI create an environment that respects and values individual differences, fostering a culture that reduces bias and recognizes and addresses systemic inequities that cause disadvantage for certain individuals. “This is not a human resources issue, it is a strategic issue,” says Kapila, Hines, and Searby, “These efforts should be reflected in organizational mission, vision, and values; incorporated into strategic plans; and cascaded throughout the organization.”

ensure a fair process and, ultimately, a fair (or equitable) outcome. Equity recognizes that some groups were (and are) disadvantaged in accessing educational and employment opportunities and are, therefore, underrepresented or marginalized in many organizations and institutions.” It is important to recognize that the language used in diversity work is significant and may vary from region to region or organization to organization. To help your organization create the most beneficial diversity plan, it is best to clearly identify what your organization means by diversity and to distinguish that from other EDI terms.

Diversity recognizes, embraces, and gives value to differences among individuals, while inclusion means creating an environment in which all individuals are treated fairly and respectfully; are valued for their distinctive skills, experiences, and perspectives; have equal access to resources and opportunities; and can contribute fully to the organization’s success. By understanding these terms, associations are better equipped to start the conversation of equity, diversity, and inclusion within their organizations.

After clearly defining EDI, organizations must then explore bias and the role it may play within the organization. This is often accomplished by looking at bias through a social justice lens. Defined as a way of seeing and acting that is aimed at critical self-reflection, social justice focuses on how people, policies, practices, and organizations may be used to oppress underrepresented

communities. Some organizations such as the National Association of Social Workers have a social justice framework that is already ingrained in the culture of their organization. Others must adapt the definitions to meet their organization’s needs.

Integrating EDI in Your Organization


Associations today are not just adapting EDI values and including them in their mission and strategic planning and hiring practices, they are developing EDI initiatives for their membership and customers. Whether it be a task force or committee or training for their professional communities, organizations are bringing the culture of EDI to their members and customers, and to the professions they serve.

In 2012, ALA began working to establish and integrate the values of EDI throughout the organization. In response to the murder of Trayvon Martin and Florida’s stand-your-ground law, and ahead of its 2016 annual conference in Orlando, ALA formed a task force to identify and define EDI and its implications on the organization. “Diversity work is often approached from an emotional, gut feeling, and hence is most often motivated by a negative incident,” says Jody Gray, director of ALA’s Office for Diversity, Literacy and Outreach Services. “There can and should be thoughtful, strategic structure to building a

culture that not only values, but engages in creating equitable, diverse, and inclusive experiences at all times.” The ALA Task Force on Equity, Diversity, and Inclusion helped ALA develop an EDI strategic direction and implementation plan to assist staff and association members with using EDI within the organization, the profession, and the library community. In addition to holding workshops and training sessions for staff, ALA’s Office for Diversity, Literacy, and Outreach Services works with libraries on how to introduce EDI in their communities.

The National Association of Social Workers formed the National Committee on Racial and Ethnic Diversity (NCORED) in 2015 to promote conditions that encourage respect for the diversity of cultures with particular focus on groups that have historically experienced racism. The National Art Education Association (NAEA) also formed a special group to foster and sustain a diverse professional community. The National Task Force on Equity, Diversity & Inclusion was launched to review NAEA’s history through the scope of EDI, identify similar initiatives occurring in other professional organizations, study the implications of NAEA’s work, and gain knowledge about the demographics of the profession across the NAEA community and throughout the field.

With the formation of these committees and task forces, member-based organizations are ensuring that their members and customers feel included and well represented within the organization and are provided with the tools necessary to use and promote EDI within their professions and workplaces.

With the diversification of the landscape of both non-profit and for-profit organizations, associations are discovering the need to incorporate equity, diversity, and inclusion in all aspects of the workplace and within their professional communities. As a result, these organizations must design and institute a proper plan that pinpoints all facets of EDI. Clearly defining what equity, diversity, and inclusion means for your organization, assessing the need and justification for EDI, creating a mission or vision for EDI, and developing priorities and goals for your organization’s EDI plan are integral in establishing a solid foundation for equity, diversity, and inclusion within your association. 

Brooke Morris is program officer, communications, for the Association for Library Collections & Technical Services (ALCTS), a division of the American Library Association (ALA).



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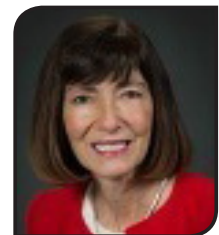
Register Now!

**ASSOCIATION MANAGEMENT ESSENTIALS:
INS AND OUTS OF ASSOCIATION LAW**

September 26, 2018
9 a.m. - Noon

This course is designed for non-legal professionals and will give you an understanding of laws impacting your work and your association. Learn about governance, tax, contracts, intellectual property, and antitrust.

Presented by:



Paula Cozzi Goedert
Partner
Barnes & Thornburg, LLP



October 2018

November 2018

OCT
4

Book Publishers Conversation Circle
9 – 10 a.m.

OCT
4

Webinar: School's Back in Session: Maximize your Forum Plus Membership
11 a.m. – Noon

OCT
11

Webinar: Uncovering the Influence of Unconscious Bias
11 a.m. – Noon

In this session participants will learn the unbelievable influence that Unconscious Bias has on all of us and our organizations too. Using real life examples and individual challenges we will take a deep dive into the impact bias continues to have and how we can use bias to better attract, retain, and promote the best talent.

OCT
17

AMC SIG: How to Develop and Strengthen a Scarce Resource: Your Board Leadership Relationships
9 – 10:30 a.m.

OCT
24

Public Policy & Advocacy SIG: Building Engagement Through Effective Government Affairs Communication
9 – 10:30 a.m.

OCT
25

Association Management Essentials: Membership 360
9 a.m. – Noon

NOV
6

Fundraising SIG
9 – 10:30 a.m.

NOV
7

Association 101
9 a.m. – 4 p.m.

NOV
7

Webinar: Managing People in Today's Competitive Workplace
11 a.m. – Noon

NOV
8

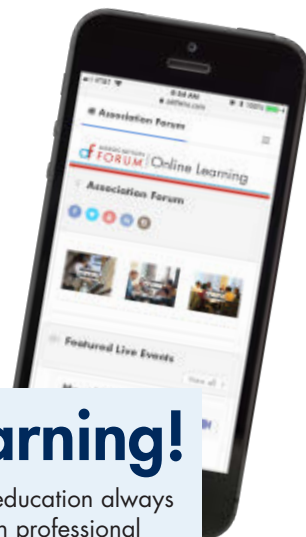
Membership SIG: Suburban Location!
9 – 10:30 a.m.

NOV
15

Meeting Professionals SIG
9 – 10:30 a.m.

NOV
15

Association Management Essentials: Your Leadership Potential
1 – 4 p.m.



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Events listed here are Association Forum programs. Further details and registration information can be found at www.associationforum.org. Programs are subject to change.

Calendar Legend

● Education Events ● Shared Interest Group Events ● Webinars

Location is Association Forum, 10 S. Riverside Plaza, Suite 800, Chicago, 60606, unless otherwise noted.

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Promotions and Changes



Denise Freier has been named CEO of the Strategic Account Managers Association (SAMA). She replaces longtime CEO **Bernard Quancard**, who will continue to serve as president emeritus and spearhead new business development in Europe. Freier joins SAMA after more than 40 years of executive and sales leadership at IBM, where she served recently as an executive leader for one of the largest global sales transformation initiatives in IBM's history and led IBM's CRM implementation. She has a BS in Management Science from the University of Illinois and an MBA from the University of Chicago.



Mena Sokoryasny has joined Association Forum as office concierge. In this position, Sokoryasny is responsible for welcoming guests, ensuring program and meeting rooms are staged appropriately and assisting her teammates in various capacities. She

has previously held administrative positions at Regus and other companies.



Million Dollar Round Table (MDRT) has appointed **Ross Vanderwolf, CFP**, and **Randy L. Scritchfield, CFP, LUTCF** to its 2019 Executive Committee. Vanderwolf will serve as the organization's 93rd president and Scritchfield will serve as secretary. Their one-year terms began September 1, 2018.



News and Awards



Oliver Yandle, JD, CAE, executive director and CEO of the Association of Legal Administrators, has been named one of Chicago's Notable LGBTQ Executives by Crain's Chicago Business. Yandle has previously held leadership positions at SmithBucklin, the

International Bridge, Tunnel and Turnpike Association, and the Commercial Law League. Yandle was the chair of the Association Forum board of directors for 2012-13 and currently serves on the Nominating Committee.

New Association Forum Members

Individual Members

John Bajkowski, American Association of Individual Investors

Pam Blauvelt, The Newport Harbor Hotel and Marina

Dirk Breiding, Akron/Summit Convention

Linda Brookhart, State Universities Annuitants Association

Vincenzo Dal Pozzo, American Supply Association

Mitch Divens, Markey's Rental & Staging

Denise Freier, Strategic Account Management Association

Stacy Harper, American Camp Association, Illinois

James Jessie, Travel Portland

Hanna Lakew, American College of Surgeons

David Martin, Sterling Martin Associates

Chris McDonnell, AIF, CFP, McDonnell Capital Management

Matt Rohrer, Higher Logic

Ayesha Salman, American Supply Association

Susan Smolarek, VISIT Lake Geneva

Ken Testani, Supershuttle/Execucar

FORUM Plus Members

Tracy McNealy, Academy of General Dentistry

Drew Summers, American Academy of Sleep Medicine

Daniel Cox, American Burn Association

Elizabeth DeWolfe, American College of Occupational and Environmental Medicine

Tami Craig, American College of Osteopathic Family Physicians

Anita Mechler, American Library Association

Robyn Foster and Nicole Peavy, American Specialty Toy Retailing Association

Mark Dorn, Millicent McIntyre, Barbara Savani and LaDonna Williams, APICS

Cara Alexander, Association Management Center

Larry Guthrie and Ryan Hernandez, CCIM Institute

Kathleen Gehrig, Emergency Nurses Association

Nancy Upke Gargula and Maria Velissariou, Institute of Food Technologists

Matt Ensenberger and Jenny Friedman, National Roofing Contractors Association

Karen Boman, Precast/Prestressed Concrete Institute

Laura Barker, REALTORS Land Institute

Conor Burton, Alexandra Campbell, Chase Culp, Tracy Fleshman, Kate Jacobson, Leah Laskowski, Doree McNulty, Juliet Osazemwinde, Scott Parker, Jennifer Sanders, Madeline Stanke, Viv Tran, Jennifer Welby and Veronica Wilson, SmithBucklin

Forum PLUS Organizations

American College of Osteopathic Family Physicians

Call for Nominations for Open Positions on the 2019-2021 Association Forum Board of Directors

Please read the Call for Nominations carefully and in its entirety to ensure full understanding of the process. All recommendations for nomination and any information collected as part of the process are strictly confidential.

In 2019, Association Forum's Nominating Committee will elect two association professional members and one industry partner to serve on the Association Forum Board of Directors for the term spanning 2019-2021. We encourage you to nominate qualified candidates.

Board member duties are as defined in the Bylaws, Article V: Board of Directors.

Bylaws Article V: BOARD OF DIRECTORS

Section 1. Authority and Responsibility. The affairs of the Forum shall be managed by the Board of Directors, which shall have supervision, control, and direction of the Forum, shall determine its policies or changes therein within the limits of these Bylaws, shall actively promote its purposes, and shall have discretion in the disbursement of its funds. The Board of Directors may adopt such rules and regulations for the conduct of its business as shall be deemed advisable and may, in the execution of the powers granted, appoint such agents as it may consider necessary.

Section 2. Composition. The Board of Directors shall be composed of thirteen (13) voting members as follows: Chair, Chair-Elect, Secretary-Treasurer, Immediate Past Chair, six (6) additional Regular Members (collectively, "Regular Member Directors"), and three (3) Supplier Partner Members (collectively, "Supplier Partner Directors"). In addition, the President & Chief Executive Officer shall be an ex-officio, non-voting member of the Board.

Section 3. Qualifications. Only Regular Members and Supplier Partner Members shall be eligible to serve on the Board of Directors.

Section 4. Term. Officers shall serve a one (1) year term in office, or until such time as their successors are duly elected, qualified, and assume their position. Directors shall serve a three (3) year term in office, or until such time as their successors are duly elected, qualified, and assume their position. In order to provide for a staggered term, two (2) Regular Member Directors and one (1) Supplier Partner Director shall be elected each year. Officers and Directors shall take office on April 1 of the year in which they are elected. Terms shall run from April 1 to March 31, or until such time as successors are duly elected, qualified, and assume their position. Regular Member and Supplier Partner Directors completing a full term in office shall not be eligible for re-election to the Board until at least one (1) year has elapsed. Notwithstanding the foregoing, Regular Member Directors completing a full term in office shall be eligible for election as an Officer of the Forum and may serve on the Board in such capacity.

Section 5. Manner of Election.

a. Nominating Committee Recommended Slate. At least sixty (60) days prior to April 1 of each year, the Nominating Committee shall recommend a slate of qualified candidates to the Board of Directors to fill each seat on the Board of Directors that is either vacant or set to expire. Members of the Nominating Committee are ineligible to stand for election to any office.

b. Publication of Slate. The Nominating Committee's recommended slate shall be announced to all members.

To learn more, visit www.associationforum.org or contact executiveoffice@associationforum.org.

Timetable and Key Actions

September 7, 2018: Call for Nominations Opens

November 23, 2018: Completed applications are due by 11:59 p.m. CT

December 21, 2018: Members selected for interviews will be notified.

January 18, 2019: Candidate interviews are conducted

March 20, 2019: Board of Directors approves 2019-2021 Candidate Slate

March 25, 2019: Approved Slate for 2019-2021 is announced to members





Digital Extra

To access *McKinsey & Company's* "Delivering Through Diversity," visit the digital or mobile versions of *FORUM*.

Delivering Through Diversity

"Delivering Through Diversity" is a follow-up to McKinsey & Company's landmark 2015 study "Why Diversity Matters." For this study, they increased the number of companies surveyed from 341 to more than 1,000. In addition, they re-surveyed those companies that were included in the initial study.

In the past, the catalysts for D&I initiatives have been traditionally intangible or superficial: social justice, regulatory mandates, legal compliance, etc. However, "Delivering Through Diversity" shows there is a strong business case for D&I. When companies achieve a balance of gender or ethnic diversity, it has a concrete positive effect on the bottom line. The study notes that a lack of quantitative data on other forms of diversity, such as LGBTQ or international experience, precludes them from inclusion; however, the qualitative data supports a similar effect on business success.

The results of the study show that while D&I in leadership is tied to profitability and value creation, businesses have been slow to improve their diversity, although the pipeline for diversity exists. In the U.S., African Americans make up 10 percent of all college graduates, yet hold only 4 percent of senior executive positions. On the flip side, white/caucasians hold 68 percent of college degrees and 85 percent of C-Suite positions.

Key findings:

"Companies in the top quartile for gender diversity on executive teams were 21% more likely to outperform on profitability and 27% more likely to have superior value creation." The highest-performing companies on both profitability and diversity had more women in line (i.e., typically revenue-generating) roles than in staff roles on their executive teams.

"Companies in the top-quartile for ethnic/cultural diversity on executive teams were 33% more likely to have industry-leading profitability." That this relationship continues to be strong suggests that inclusion of highly diverse individuals—and the myriad ways in which diversity exists beyond gender (e.g., LGBTQ+, age/generation, international experience)—can be a key differentiator among companies.

"Companies with the most ethnically/culturally diverse boards worldwide are 43% more likely to experience higher profits."

"Overall, companies in the bottom quartile for both gender and ethnic/cultural diversity were 29% less likely to achieve above-average profitability."

Source: McKinsey & Company, "Delivering Through Diversity"

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